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August 10, 2016

**REQUEST FOR PROPOSAL (RFP) FOR
California Metropolitan Planning Organization (MPO) Cooperative Household Travel
Survey Dated June 21, 2016**

QUESTION AND ANSWER DOCUMENT #1

- Q1:** On page 18, under the Task 2.2 deliverable, that stakeholder engagement timeframe is listed as January 2016-December 2017. Are we right in assuming that it should be January 2017-December 2017? We would also assume that there would be no objection to additional stakeholder engagement in early 2018 before the final report in May of that year.
- A1:** That is correct. Please see Addendum No. 1, Item 3.
- Q2:** Which of the Appendix Federal forms are required? I would assume that the Debarment (F-1) and Lobbying (F-2) forms are required. I do not see a separate Debarment form for the prime contractor.
- A2:** That is correct, Appendix F-1, Debarment and Appendix F-2, Lobbying are the required federal forms that must be submitted as part of the proposal response.
- Q3:** I could not locate a Disadvantaged Business Enterprise (DBE) goal or a discussion of Federal funding, although on page 30 it notes that MTC will establish DBE goals for each Task Order. Should we complete the Federal DBE forms with overall budget amounts?
- A3:** No. Because DBE goals will be set for each Task Order, the Federal DBE forms will be completed and submitted as part of the Task Order execution process. However, the proposers should assess each task in the scope of work and assemble a team of consultants accordingly.
- Q4:** Which of the forms require “wet” signatures for the proposal submission?
- A4:** An original, “wet” signature is only required on the transmittal letter. All other signatures may be electronically signed or copied.
- Q5:** Is the study intended to focus on the industries benefiting most from the study?
- A5:** No. MTC would like the study to include a wide range of sectors and industries in the cluster analysis. For example, manufacturing and customer service industries would be likely involved. The goods movement cluster encompasses about one-third of the jobs in the region. But, MTC is interested in seeing the approach presented by proposers. MTC would like to engage employers and workforce development stakeholders in this process.

Q6: You mentioned five to ten geographic areas of study. Do those include port or metropolitan areas?

A7: Yes. There are three different metropolitan planning organizations (MPO) involved in this study, which cover a large geographic area. To ensure meaningful outcomes, MTC would like this study to look for a handful of priority areas where all three MPOs should target their investments. Since the scope of the study ranges from transportation investments to land use and workforce development strategies, multiple entities will be involved, each expecting a stronger focus on their local issues. This makes it even more important to focus on a handful of priority areas that are significant at the mega-regional level.

Q7: Are state and regional studies going to be as much of a focus on this study?

A7: This study seeks to drill-down into the firms that are in this cluster, as well as reach out to the firms that are involved in the process to see what more can be done at that level.

Q8: Will proposals that exceed the \$450,000 budget be considered for evaluation?

A8: No. Please see Addendum No.1, Item No. 2.

Q9: Are travel expenses reimbursable?

A9: Yes. Please see Page 23 of RFP, Appendix C, MTC Standard Consultant Contract.

Q10: Will the report be coming out at one time?

A10: No. The report will be released in progressive stages.

Q11: Is a technical advisory council (TAC) envisioned for this study?

A11: A TAC is not currently envisioned but there is room to revisit this question. A mega-region working group does exist. It meets quarterly and is composed of commissioners from the Metropolitan Transportation Commission (MTC), San Joaquin Council of Governments (SJCOG), and Sacramento Council of Governments (SACOG). This working group is expected to oversee this project. But, one of the tasks is for the proposer to determine a stakeholder plan. Therefore, establishing a TAC may be explored.

Q12: Is MTC willing to take an exception to or modify Appendix D, MTC Standard Consultant Contract, Section 6A, Termination for Convenience, that discusses that in the event MTC were to terminate the contract for MTC's own convenience, MTC will only reimburse profit up to 4%.

A12: No.

Q13: Am I correct in understanding that subs must meet the MTC insurance requirements as well, such that if we have any potential subconsultants, we should ask them to review the MTC insurance requirements and confirm that they can comply. ?

A13: No. Please review Appendix D, MTC Standard Consultant Contract, Attachment E, Insurance and Financial Security (Bond) Provisions, Section 1A. Minimum Coverages. Specifically, Paragraph 2 which states (with emphasis added):

“CONSULTANT is also required to assess the risks associated with work to be performed by Agents under subcontract and to include in every subcontract the

requirement that the Agent maintain adequate insurance coverage with appropriate limits and endorsements to cover such risks. To the extent that an Agent does not procure and maintain such insurance coverage, CONSULTANT shall be responsible for said coverage and assume any and all costs and expenses that may be incurred in securing said coverage or in fulfilling CONSULTANT's indemnity obligation as to itself or any of its Agents in the absence of coverage.

Q14: Is MTC willing to take an exception to or modify Appendix D, MTC Standard Consultant Contract, Section 4, Key Personnel that discusses that the consultant cannot substitute any staff person listed in the contract or reduce any staff person's hours by more than 10% without prior MTC approval?

A14: No.

Q15: Does Appendix D, MTC Standard Consultant Contract, Section 11 mean that MTC becomes the exclusive owner of everything prepared or developed under this contract, the proposer gives up all rights to re-use anything proposer produces for MTC, and proposer will not be able to retain any rights to re-use anything prepared for MTC?

A15: Yes; however, MTC may provide the right to the selected consultant to use work product related to this project on a case by case basis.

Q16: Is MTC willing to modify Appendix D, MTC Standard Consultant Contract, Section 11, to add the following language to the final paragraph:

“Provided, nothing herein shall prevent CONSULTANT from using pre-existing materials in the performance of its services or purchasing or licensing data or other materials from third parties which are not in the public domain, and which may be provided under the terms of a license agreement and/or nondisclosure agreement.

A17: No. However, MTC will be willing to add a provision along these lines in MTC's sole discretion if the necessary legal rights to use such data or other materials are provided to MTC.

Q17: Does the task budget presenting a breakdown of hours and expenses by task and deliverable in each phase of the project; and line item budget presenting a breakdown of costs by cost categories, including billing rates for key personnel and job classifications account for the annual escalation rate in the rates we provide?

A17: Please see Addendum No. 1, Item No. 4.

Q18: Is there an overall DBE goal, or will DBE goals be set at the task order level?

A18: Please see Appendix F, Federal Requirements on page 30 of the RFP. MTC will establish DBE goals for each task order issued under any contract entered into as a result of this procurement.

Q19: The cost proposal accounts for 30% of the evaluation points, which is a pretty large percentage. Is that figure correct?

A19: Please see Page 12 of the RFP, Section VII. C. Evaluation and Evaluation Criteria. Cost is 20% and Cost effectiveness is 15% of the total evaluation score.