

**MAG REQUEST FOR PROPOSALS:**  
**STATEWIDE TRANSPORTATION SURVEY**

**PRE-PROPOSER'S CONFERENCE**

*A pre-proposer's conference was held at the MAG offices on Friday, January 18, 2008. The purpose of the conference was to provide information regarding a Request for Proposals from qualified consultants to conduct a Statewide Transportation Survey. A PowerPoint presentation outlining the purpose, goals and tasks of the Statewide Transportation Survey was presented and is available for download at <http://www.mag.maricopa.gov/rfp.cms?item=8316>.*

*The following represents a summary of the presentation as well as questions received following the PowerPoint presentation and the answers that were provided.*

**Pre-proposer's Conference: Presentation**

Kelly Taft, MAG communications manager, stated that the purpose of the conference was to provide information about the proposal process. She noted that all of the information provided, as well as the questions and answers received, would be summarized in writing and posted to the RFP section of the MAG Web site. She stated that all questions received during the bidding process will be summarized and posted to the Web, to ensure that no consultant has an unfair advantage in the process. She noted that, with the exception of the current meeting, all questions must be posed in writing so that the question and answer can be posted.

Ms. Taft noted that most of the information presented today can be found within the RFP. The pre-proposer's conference is an opportunity to pull out the key elements of the process and give potential bidders a chance to ask any questions.

Ms. Taft stated that the agenda would include some brief background about MAG's role in the region as well as some of the background that led MAG to determine that a statewide transportation survey was needed. She noted the presentation would cover the purpose of the poll, budget & time period, scope of work, evaluation criteria and schedule, and then she would take questions.

MAG is the designated Council of Governments (COG) and Metropolitan Planning Organization (MPO) for transportation planning for the metropolitan Phoenix area. MAG is also the designated Air Quality Planning Agency for the region.

MAG has 32 members. The MAG membership consists of 25 cities and towns, 3 Native American Indian Communities and Maricopa County. The Regional Council, MAG's governing board, also includes representatives from the Arizona Department of Transportation and Citizens Transportation Oversight Committee.

Ms. Taft stated that MAG was formed to provide a regional forum for the discussion and study of regional problems. Having municipalities work together ensures the pooling of resources, allows local governments to find solutions to regional problems, adopt common policies, and prepare for future growth.

As one of nine regional planning agencies in the state, MAG is also a member of the Arizona COG/MPO Association, which is made up of all of the Councils of Governments and Metropolitan

Planning Organizations in the state. Over the past year, the Association has been meeting to discuss growth and transportation issues.

Using history as a guide, Ms. Taft noted there is strong evidence that Arizona will more than double in population by 2050. Projections show the state will grow from our current 6 million population to 15 million by 2050, while the Maricopa region will grow from 3.7 million to 8.1 million. Additional statewide funding for transportation infrastructure is anticipated to be necessary to accommodate this growth. Growth will occur in the urban core of the state to a “megapolitan area” stretching from Flagstaff to Nogales.

To address this growth, in 2006 the COG/MPO Association launched a project known as Building a Quality Arizona or “BQAZ.” The key concerns of BQAZ are to:

- Plan for the growing population
- Identify transportation infrastructure needs
- Put a cost figure on those needs
- And in times of shrinking budgets, determine how to pay for infrastructure that is increasing in cost every year.

BQAZ began with a Statewide Mobility Reconnaissance Study last year to frame the issues, to look at existing and future demand for the system, identify bottlenecks and develop a travel demand tool to provide a consistent method of analysis.

One recommendation of the reconnaissance study was to conduct additional subarea “framework” studies to identify key transportation corridors and develop mobility strategies. The statewide transportation survey for which MAG is requesting proposals will be used to inform those studies regarding public attitudes on transportation priorities, future demand, and potential financing strategies.

Ms. Taft reported that on December 19, 2007, the MAG Regional Council recommended that a public attitude survey be conducted to help provide that important public input.

She stated that the purpose of the poll is to develop and conduct an independent, scientifically valid household telephone survey of likely voters to measure regional and statewide public attitudes, opinions, and interests relevant to addressing transportation mobility needs. It will also provide important input about voter support of funding options as well as election timing. Proposals need to be constrained to a cost not to exceed \$55,000. It is anticipated the project will be completed in 90 days from the notice to proceed.

Ms. Taft discussed major tasks of the RFP. As necessary, the consultant will refine the Scope of Work for this project based upon professional experience and input from MAG. This may include additional tasks or refinements to the scope or schedule.

Working with MAG and utilizing transportation research nationally and statewide, the consultant will prepare the draft survey instrument. Questions may include, but are not limited to, public attitudes on transportation choices; transportation needs both regionally and statewide; methods of funding; and voter attitudes regarding election timing, growth, and open space preservation.

The consultant will conduct a workshop for identified stakeholders to review the draft survey instrument and the sampling and survey methodologies and processes. The consultant will then determine whether refinements to the survey instrument are necessary based upon stakeholder comment.

The consultant will conduct a statewide transportation poll that will encompass an appropriate universe of likely voters to be statistically valid. The survey must be conducted in a manner to enable the analysis of the findings statewide as well as by the following subareas: Maricopa County, Pima County, and the balance of the state.

Finally the consultant will tabulate survey results, key findings, detailed findings, conclusions and recommendations. Findings will be analyzed for the entire state and by the subareas noted above. The findings will be compiled into a Final Report.

Ms. Taft noted that consultants may want to recommend additional approaches, such as focus groups, targeted stakeholder interviews, etc. Maybe the consultant will recommend a larger sample universe. Or maybe they want to recommend additional geographies such as Pinal County or Legislative districts. Or they may want to bid at a lower amount. Of course any additional tasks must be completed within the approved budget amount of \$55,000.

Ms. Taft stated the deliverables that would be required:

Working Paper 1, Revised Scope of Work and Project Schedule, listing specific project tasks and a schedule for completion of each task.

- Working Paper 2, Draft Survey Instrument.
- Working Paper 3, Final Survey Instrument
- Working Paper 4, Final Survey Report with Executive Summary

Ms. Taft discussed evaluation criteria. Proposers must demonstrate understanding of the project through a well-defined work plan consistent with program objectives. Proposals will be evaluated on the clarity of proposal, realistic approach, technical soundness, and enhancements to elements outlined in the RFP. They will also be evaluated on the experience of the project manager and other project personnel in similar studies, as well as a proven track record in this area of study. Proposers should identify the principal people who worked on past projects and the amount of time they devoted to the work effort.

Key personnel need to be available throughout the project effort. The maximum budget amount is \$55,000. Proposals can come in under the budget amount. Or the team will look at what the value is for the cost and any "value added" elements of the proposal. The team will also consider the consultant's ability to complete the project within the specified time period, meet all deadlines for submitting work products, and ensure quality control. The consultant needs to demonstrate recognition of work priorities and flexibility to deal with change and contingencies.

MAG may use additional evaluation criteria, such as whether the proposal meets all requirements of the RFP.

All proposals will be evaluated by an independent team of seven panel members, who will include representatives from MAG, Valley Metro, METRO, Phoenix, Glendale, Mesa. MAG may bring in for interview bidders who are reasonably likely to be selected for award.

Ms. Taft outlined the schedule for the proposal process.

January 31, 2008 is the key date. Proposals must be at the MAG office by 12 NOON. Bidders can bring them to the receptionist on the 3rd floor. There are no exceptions. MAG encourages hand delivery of proposals and reminded participants to take into account the heavy construction in the office area.

Proposals will be recorded and publicly opened that same day (January 31, 2008) at 12:05 in the Cholla Room. Ms. Taft noted proposals will be delivered on February 1, 2008, to the evaluation team for review.

On Feb 5, 2008, the evaluation team will meet as a group to determine if oral interviews are warranted. We will give about a week's notice to finalists, so Ms. Taft strongly urged bidders to reserve the consultant interview date in advance. February 12 is the date that has been set aside for consultant interviews. There is no flexibility in this date, therefore, she suggested that all key project personnel prepare accordingly.

On February 13, the MAG Management Committee will meet at 12:00 PM in the Saguaro Room. The Management Committee potentially recommends consultant. On February 20, at 4:00 PM in the Saguaro Room, the Transportation Policy Committee potentially recommends consultant.

On February 27, the Regional Council will be requested to give final approval to the recommended consultant. That meeting is at 5:00 PM in the Saguaro Room. A notice to proceed would then be anticipated around March 5, 2008.

That concluded the presentation and the meeting was opened for questions.

### **Questions Received at the Pre-proposers Conference January 18, 2008.**

#### **1. You mentioned that the poll would encompass "likely voters." How do you define "likely voters?"**

One goal of the survey is to determine whether statewide voters support various elements of a statewide transportation plan. We would rely on your expertise to advise us as to whether the database of respondents includes only registered voters, or others who may be likely to vote in the election, but are not yet registered. We want the end result to be a valid indication of what is likely to happen at the polls.

#### **2. You say the consultant will need to review other regional and statewide transportation surveys. Would you provide us those surveys or is that something you would ask us to find on our own?**

We could point you to several recent transportation studies from Arizona, but we would also expect you to find similar national polls to inform your study approach. We will not require extensive secondary research, but enough so that we are not "reinventing the wheel" and duplicating work already done. We want an independent study that will provide the information we are seeking.

#### **3. What is the size of the stakeholder group for the workshop?**

It will probably be fairly large. When we held a similar workshop for Prop 400 we had members of the business community as well as elected officials providing input to ensure that the survey garners the information necessary to meet their needs. We have not identified the stakeholder list yet, that is something we will be doing in the next few weeks.

#### **4. When you say you want the survey to include statewide statistics as well as Maricopa County, Pima County, and balance of state, what level of reliability are you seeking?**

We need the samples to all be statistically valid. We did not include specific confidence levels, we leave that to your expertise, but we need to know that we have a valid survey consistent with the

true feelings of the voters, so we need the sample universe for each of those geographies to be stand-alone, statistically defensible, as well as for the entire state to be statistically valid.

**5. Do you have any thoughts on whether you would like it to be broken down by male/female?**

Once again, we would seek your expertise, but off the top of my head I do not see any specific reason that we would need to break it down along those lines. I think for the purpose of an election we would be more concerned about specific geographies. If we had an unlimited budget, we might have asked it to be broken down by regions so that there is buy-in in all of the specific subareas of the state, or even by legislative district to help inform elected officials. Our goal is to have a statewide plan that has "ownership" by all areas of the state, both rural and urban, but we recognize there are financial constraints, so we've picked the most important geographies needed.

**6. What about English/Spanish? For the general population, we typically conduct Spanish language interviews, but for likely voters, we tend not to conduct Spanish interviews. What is your preference?**

That is not something we had considered within the RFP. We would certainly rely on your expertise. Let us get back to you on that.

*NOTE: (In discussion following the meeting, MAG determined that previous transportation surveys have been conducted in both English and Spanish.)*

**7. The DBE (Disadvantaged Business Enterprise) portion of the RFP says your target is 11 percent?**

The participation goal for MAG as an organization for DBE contracts is 11 percent. It does not mean that every contract needs to have DBE participation, so if you do not qualify as a DBE, you do not need to let that deter you from proposing.

**8. So if we can do everything in-house we would just let you know that if we need to?**

DBE eligibility is not a requirement. However, any subconsultant that you anticipate using should be identified as part of your RFP response, and be budgeted as part of the proposal. Because once we get to the contract stage, everyone involved in the project needs to be identified within the contract. If additional personnel are required, a contract amendment would be necessary. In addition, each task in the contract must have an identified budget amount.

**9. Does the 25 page maximum for the proposal include a cover page?**

Yes. Consultants are encouraged to review the proposal requirements carefully. For example, each proposer must submit a proposer's registration form (page 14 of the RFP). The proposals can not exceed 25 pages including cover letter, resumes, charts, appendices everything. Cover letters must be signed by someone authorized to bind the entity submitting the proposal. We recognize that can be constrictive but we want to ensure the evaluation team has time to thoroughly review each proposal.

No other questions were asked. Ms. Taft reminded future questions can be addressed in writing to her at [ктаft@mag.maricopa.gov](mailto:ктаft@mag.maricopa.gov), or via fax at 602-254-6309. More information is available on the RFP section of the Web site.