

ANSWERS TO POTENTIAL OFFEROR QUESTIONS

Below are the answers to questions that have been sent in by potential offerors between Wednesday, May 13 and Friday, May 22. The overall proposal request and submission deadline have not been modified.

Q1. We are concerned that the current estimated contract value of above ten thousand dollars (\$10,000) and below fifty thousand dollars (\$50,000) will not be sufficient given the scope of work outlined. Is the high end of the estimated amount also the maximum amount available for this contract?

A1. It is the County's intent to stay within the \$10,000 to \$50,000 range for this contract, but all bids up to the Informal maximum contract value of \$100,000 will be considered. Should bids come in above \$50,000, the County may be able to fund work up to \$80,000 for the total life of the contract. When placing a bid that is above \$50,000, it is recommended to show in your draft scope of work the amount of work that can be completed under \$50,000 and what work would be accomplished above \$50,000.

Q2. Will the successful contractor have an opportunity to negotiate the County's General Conditions of Contract between Count and Contractor? Should exceptions be included in the Contractor's proposal?

A2. It is highly unlikely that the County's General Conditions of Contract will be modified. These terms are standard for County contracts and are designed to protect the interests of the County and its taxpayers. If a potential offeror would like to seek an alteration to the Conditions, it should be specified in the proposal.

Q3. What specific information do we need to provide from subconsultants?

A3. Information should include: The legal name and address of the organization, contact person, phone number, and e-mail address. In addition, include the proposed team members and their qualifications as you would for the prime contractor.

Q4. Can we provide an additional reference form for the subconsultants, should be combine sub references with the prime references on one form, or should the reference form be only for the prime?

A4. Please provide references for the subcontractor on an additional reference form.

Q5. What is the structure of the workgroups, and what Montgomery County departments/organizations will be involved?

A5. While we are still forming the workgroups, here is what we are planning: The 3 workgroups will consist of 15-20 members. The membership will be a mix of government subject matter experts from city, county, and state government. The organizations involved will be: Cities of Rockville, Takoma Park, and Gaithersburg, Department of Transportation, State Highway Administration, Maryland Highway Safety Office, Montgomery County Public Schools, Health and Human Services, Montgomery County Police, Public Information Office, Fire and Rescue Service, County Council, County Executive's Office, Montgomery County Parks, and Montgomery County Planning.

Q6. Section 1.5.1-staffing provides that there may be more workgroups than the three identified. How many more potential workgroups do you anticipate?

A6. At this time, I anticipate only 3 workgroups, but as the 3 groups start to meet they made decide to create subgroups. If they do break off or create subcommittees, the County will be responsible for staffing those breakouts. Another option would be to reallocate the meeting maximum of 15 and have it so that, for example, 5 groups meet 3 times covered by the contractor.

Q7. Section 1.3.3 refers to expertise in transportation planning and engineering; yet, this element is not a part of the evaluation criteria. Can you explain or give guidance here?

A7. The link between transportation planning and engineering is covered by evaluation criteria 3 "Describe prior experience and knowledge with Vision Zero or other traffic safety programs." I expect Offerors that would score high on this criteria item would provide evidence of working on traffic safety programs which typically requires a background in transportation planning and engineering. There may be other routes to scoring higher in this area, but the experience in transportation planning and engineering is the most likely way to get there.



PROPOSAL REQUEST
INFORMAL SOLICITATION # 1116559
VISION ZERO 10-YEAR STRATEGY WORKGROUP SUPPORT
Montgomery County, Maryland

Office of the County Executive

May 22, 2020

ISSUE DATE: May 13, 2020

SUBMISSION DEADLINE: May 29, 2020 at 6PM

SCOPE OF WORK SUMMARY: The selected contractor will assist the Montgomery County Office of the County Executive in facilitating workgroups that will develop the objectives, strategies, action items, and performance metrics for the Vision Zero Ten-Year Strategy and 2021-22 Action Plan. The following pages contain the scope of work, terms, and conditions for this Solicitation.

The County anticipates the estimated contract value to be above ten thousand dollars (\$10,000) and below fifty thousand dollars (\$50,000). The total contract value cannot exceed the Informal threshold (below \$100,000), including any potential renewal years. Payment will be based on the negotiated fully-burdened hourly rate approved under the resulting contract.

NOTE: All offerors must have proposal responses signed by an authorized representative of your firm responding firm.

Proposals must be submitted to the e-mail address below by the closing date and time:

VisionZero@montgomerycountymd.gov

with the subject line "Proposal for Solicitation #1116559 Vision Zero 10-Year Strategy Workgroups."

Should you have questions regarding this Informal, please contact Wade Holland, Vision Zero Coordinator, at (240) 777-2623 or Wade.Holland@montgomerycountymd.gov.

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I. SCOPE OF SERVICES

I.1. BACKGROUND

Montgomery County adopted Vision Zero via a County Council resolution in 2016 and the County Executive has sponsored two action plans, the 2018-19 Two-Year Action Plan and the 2020 Action Plan, to implement Vision Zero. Both of the County Executive's Action Plans called for the creation of a long-term Vision Zero strategy that would guide County Government towards the elimination of serious and fatal collisions for pedestrians, cyclists, and motor vehicle occupants by the year 2030. The Action Plans can be found at: <https://montgomerycountymd.gov/visionzero/action.html>.

With the ambitious and wide breadth of the Vision Zero initiative, the Office of the County Executive is seeking contractual support to facilitate workgroups of government subject matter experts that will build upon the 2018-19 and 2020 Vision Zero Action Plans and create a 10-Year Strategy and a Two-Year Action Plan to guide the County's workforce and resources towards eliminating serious and fatal traffic crashes. External, public engagement will not be undertaken in this phase of the 10-Year Strategy development as that scope of work will be issued under a separate proposal.

I.2. PURPOSE AND INTENT

The purpose of this solicitation is to solicit proposals for facilitating at minimum three (3) workgroups of government subject matter experts. The Contractor will support the workgroups in building and finding consensus on objectives, strategies, action items, and performance metrics for a 10-Year Vision Zero Strategy and 2021-22 Action Plan.

The County is seeking to enter into a contract with one (1) highly qualified Offeror to support the County in facilitating workgroups that will develop the objectives, strategies, action items, and performance metrics for the Vision Zero Ten-Year Strategy and 2021-22 Action Plan as described in the Scope of Services below. Due to the on-going public health emergency, it is the intent of the County to keep County employees and Contractors safe and will work with the Contractor to establish virtual meetings as described in the Contractor's responsibilities and County's responsibilities below.

I.3. SCOPE OF SERVICES/SPECIFICATIONS/WORK STATEMENT

I.3.1. Submit Project Plan – The Contractor will ensure that project tasks and resources are utilized so that each of the three (3), or potentially more, workgroups meet at least five (5) times from September 1, 2020 to January 15, 2021 and that the end product meets the County's requirements. The County requires that each workgroup develop a set of objectives, strategies, and performance metrics for the Vision Zero 10-Year Plan and action items to complete during the 2021-22 Action Plan. The Action Plan will be a set of actions the government will take during Fiscal Years 2021 and 2022 to begin implementing the strategies outlined in the 10-Year Plan. Prior to the workgroup's first meetings, the Contractor should plan at least two (2) meetings – one in late July and one in August, to gather the County's requirements for the workgroups and prep for the workgroup sessions. As part of the Contractor's proposal, the Contractor should provide a draft scope of work with

tasks, timelines, deliverables, and staffing levels to detail how the Contractor anticipates meeting the County's requirements.

- I.3.2. **Project Management** – This project will be conducted in close coordination with the Vision Zero Coordinator and the Vision Zero Steering Committee. The Contractor will be responsible for the daily management of the project team and will assign a Project Lead that meets or exceeds the requirements listed under *Contractor Qualifications* listed below. At minimum, monthly progress updates will be provided by the Contractor to the Vision Zero Coordinator and Steering Committee that will identify tasks that have been accomplished, issues encountered, and how those issues are being resolved. The Contractor's project management will include quality assurance and quality control for all deliverables.
- I.3.3. **Facilitate workgroup sessions** – The Contractor will take direction from the Vision Zero Steering Committee and the co-chairs of each workgroup about general topics and ground rules for running each workgroup session. The Contractor will provide, at minimum, one (1) staff member at each workgroup meeting to aid the discussion. The County is not requiring a unique staff member to be assigned to each workgroup. If Contractor staff are assigned to multiple workgroups, the County will work with the Contractor to find amenable meeting dates and times for all involved parties. By the end of the fifth meeting, each workgroup will have developed the objectives, strategies, and performance metrics for the Vision Zero Ten-Year Strategy and linked action items for the 2021-22 Vision Zero Action Plan. The Contractor will be responsible for recommending facilitation techniques and materials that the Contractor, in its experience and knowledge, will lead to productive workgroup meetings. The Contractor will offer their experience and expertise in transportation planning and engineering to help the workgroups define and prioritize the strategies and action items.
- I.3.4. **Provide administrative support for the workgroups** - The Contractor will provide resources that will help the County administer the workgroups. Facilitation and administration roles do not have to be split among the Contractor's assigned staff. Administrative support includes, but is not limited to, drafting agendas, taking meeting notes, and publishing meeting notes and follow-up items.
- I.3.5. **Final reports from workgroups** – At the conclusion of the workgroup meetings, the Contractor will provide to the County a summary of all meetings and the groups' consensus on the objectives, strategies, performance measures, and short-term action items that align with the County's Vision Zero goal of eliminating serious and fatal traffic crashes by 2030.

I.4. CONTRACTOR'S QUALIFICATIONS

- Experienced firm and project team that can successfully facilitate and administer workgroup meetings with participants coming from diverse levels of experience, backgrounds, and perspectives to find consensus under prescribed deadlines. The Project Lead should have five (5) or more years of experience for this qualification.
- Experience and knowledge of strategic plan development including creating objectives, strategies, performance metrics, and action items. The Project Lead should have five (5) or more years of experience for this qualification.

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- Experience and knowledge of Vision Zero, Complete Streets, Safe Systems Principles, and/or other traffic safety programs. The Project Lead should have three (3) or more years of experience for this qualification.
- Provides and can adhere to a project proposal with deliverables, timelines, milestones, and staffing plans that align with the timelines, budget, and expectations set in the Scope of Work above. The Project Lead should have five (5) or more years of experience for this qualification.
- While minimum qualification thresholds are set for the Project Lead, the Contractor should detail the experience and qualifications of its proposed team members.
- The Contractor must provide a list of at least three (3) professional references that can validate the Contractor's experience in providing services of similar scope and nature to the ones included in this solicitation. See Attachment B – References to provide your references along with your proposal.

I.5. CONTRACTOR'S RESPONSIBILITIES

The Contractor must provide services to the County in accordance with the terms and conditions of the Contract. Services will be provided within the fully burdened hourly rates agreed to in the Contract that is inclusive of overhead, cost of benefits, profit, multipliers, travel, etc. Billable hours and work performed shall be documented and submitted to the County's Contract Administrator when submitting a request for payment.

- I.5.1. **Staffing** – The contractor is responsible for providing the necessary staff to provide the services to the County. The staffing plan should provide uniform support to the three (3), or potentially more, workgroups, with at minimum one (1) staff member assigned for each workgroup. The County does is not requiring a unique staff member to be assigned to each workgroup. If Contractor staff are assigned to multiple workgroups, the County will work with the Contractor to find amenable meeting dates and times for all involved parties. The Contractor will notify the County in writing of any changes to staffing and the County reserves the right to reject substitute staffing if the substitute is deemed not eligible to provide the service as set in the Contract and/or does not have equal or better qualifications.
- I.5.2. **Meeting Materials** – If meetings are held in-person at County facilities, the contractor will provide printed agendas and materials to facilitate the discussion and brainstorm ideas such as, but not limited to, butcher paper, sticky notes, or printed activities. Materials to be provided by the County are listed in Section I.6 below. If in-person, Contractor must also adhere to the County's COVID-19 operational requirements, including social distancing, etc.
- I.5.3. **Virtual Meeting Requirements** - Workgroup meetings may be held completely virtually, in-person at County buildings, or hybrid virtual/in-person. The Contractor must ensure its staff have the technology and internet bandwidth to live-stream video from their computer, view live video from meeting participants, and share documents, presentations, and collaboration space (such as a virtual white board) with the workgroup in real-time. The County will provide a platform (Microsoft Teams) for meeting virtually, but the Contractor may substitute its own virtual meeting platform at its own expense if the Contractor's platform meets the needs of

the workgroup and is approved for use by the County Government's Department of Technology Services.

I.6. COUNTY'S RESPONSIBILITIES

- I.6.1. Provide regular guidance to the Contractor through, at minimum, monthly in person or virtual meetings and e-mail. Guidance will be given from the Vision Zero Coordinator, Vision Zero Steering Committee, and co-chairs of the workgroups.
- I.6.2. Develop the structure, scope, assign co-chairs, and list of attendees of the three (3), or potentially additional, Vision Zero 10-Year Strategy workgroups.
- I.6.3. Schedule the date, time, and location of the workgroup meetings that will be facilitated by the Contractor. Workgroup meetings will typically be held during the traditional County workday, but may require early morning (before 8:30AM) and afternoon (after 5:00PM) meetings to meet the needs of all participants.
- I.6.4. Provide the Contractor with the work completed under Phase I of the Vision Zero 10-Year Strategy to ensure successful start to the Phase II workgroups. Phase I materials provided will include results from community and County Government surveys, data analysis, and stories, feedback, and ideas received from the County's outreach efforts to ensure the workgroups' recommendations reflect the larger community and founded in evidence and are data-informed.
- I.6.5. If meetings are held in-person, the County will provide meeting rooms to accommodate the discussions. The rooms will include computers connected to the internet and a projector or screen to share content in the room and with virtual participants, white boards, and tables and chairs.
- I.6.6. The County Government subscribes to the Microsoft Teams virtual meeting platform that allows for sharing video, audio, and meeting materials (such as slide deck presentations) in real-time. The County will create and set-up the virtual meetings. The County's virtual meeting solution will not require the Contractor to procure licensing or access the County's network to join the meeting. If there are issues with virtual meetings, the County will provide a conference call option for all meeting participants and facilitators.

I.7. REPORTS/DELIVERABLES

- Monthly status reports to the Vision Zero Coordinator and Vision Zero Steering Committee.
- Meeting notes for all workgroup meetings.
- Final report with a summary of all meetings and the workgroup's consensus on the objectives, strategies, performance measures, and short-term action items that align with the County's Vision Zero goal of eliminating serious and fatal traffic crashes by 2030.

II. EVALUATION CRITERIA AND AWARD METHOD

- Each proposal will be reviewed and evaluated based on the **EVALUATION CRITERIA** listed below.
- The Contract will be awarded to the highest ranked Offeror that achieves a score of at least 60 out of 100 points, based on the scores of the written proposal evaluation. An Offeror will also be checked for responsibility.
- Interviews will not be conducted.

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- At its sole discretion, the County reserves the right to cancel this solicitation, to extend the time for all Offerors to request additional information in the County’s best interests, in any manner necessary, to serve the best interest of the County.

EVALUATION CRITERIA

POINTS

The County will evaluate the written proposals based on the following criteria.

1. Describe prior experience with facilitating workgroups of diverse experience, backgrounds, and perspectives to find consensus under prescribed deadlines.	<u>30</u>
2. Describe prior experience and knowledge of strategic plan development including creating objectives, strategies, performance metrics, and action items.	<u>20</u>
3. Describe prior experience and knowledge with Vision Zero or other traffic safety programs.	<u>20</u>
4. Project proposal includes project management deliverables, milestones, and staffing plan that align with the timelines and resource expectations set in the scope of work.	<u>20</u>
5. Price	<u>10</u>
Highest possible score for written proposal evaluation:	<u>100</u>

III. SUBMISSION REQUIREMENTS

Proposals are due by or before **6:00PM on Friday, May 29, 2020. FAILURE OF AN OFFEROR TO SUBMIT ALL REQUIRED PROPOSAL SUBMISSIONS MAY RENDER ITS PROPOSAL UNACCEPTABLE.**

III.1. Offeror’s must submit their proposals in an electronic format (.pdf document format preferred) to:

Wade Holland, Vision Zero Coordinator
VisionZero@MontgomeryCountyMD.gov

III.2. The subject line of the e-mail with the attached proposal should state: “Proposal for Solicitation #1116559 Vision Zero 10-Year Strategy Workgroups”

III.3. Proposals must include, at minimum, the following sections:

III.3.1. A one-page cover letter of introduction which includes the following:

- III.3.1.1. The date of the proposal submission;
- III.3.1.2. Contractor’s legal name and address of the organization (Offeror);
- III.3.1.3. Contact person, phone number, and e-mail address

III.3.2. The Offeror will detail its experience successfully facilitating and administering workgroup meetings with participants coming from diverse levels of experience, backgrounds, and perspectives to find consensus under prescribed deadlines.

III.3.3. The Offeror will detail prior experience and knowledge of strategic plan development including creating objectives, strategies, performance metrics, and action items.

III.3.4. The Offeror will detail its experience and knowledge of Vision Zero, Complete Streets, Safe Systems Principles, and/or other traffic safety programs.

III.3.5. The Offeror will provide a draft project proposal with deliverables, timelines, milestones, and staffing plans that align with the timelines, budget, and expectations set in the Scope of Work above.

III.3.6. Acknowledgement Page, Attachment A

III.3.7. References, Attachment B

III.3.8. Cost Proposal Sheet, Attachment C

IV. COMPENSATION

IV.1. TOTAL CONTRACT VALUE

The total contract value cannot exceed the Informal threshold (below \$100,000), including any potential renewal years. Payment will be based on the negotiated fully-burdened hourly rate approved under the resulting contract.

The County anticipates the estimated value to be above ten thousand dollars (\$10,000) and below fifty thousand dollars (\$50,000).

IV.2. PAYMENT FREQUENCY

The Contractor will be paid on a monthly basis, within 30 days after the County's receipt and acceptance of an invoice submitted by the contractor and in a form approved by the County. The monthly invoice will include progress updates and identify tasks that have been accomplished, issues encountered, and how those issues are being resolved.

V. TERM

The effective date of the Contract resulting from this solicitation will begin upon signature by the Director, Office of Procurement. The period in which Contractor must perform all work under the Contract begins on the Contract effective date (or upon a Notice to Proceed issued by the County) and ends after a one-year period. Contractor must also perform all work in accordance with time periods stated in the Scope of Services. Before this term for performance ends, the Director at this/her sole option may (but is not required to) renew the term. Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise his/her option to renew this term one time for one year.

VI. CONTRACT ADMINISTRATOR

VI.1. AUTHORITY

The Director, Office of Procurement, is the delegated contracting officer. Therefore, the Director, Office of Procurement, must approve amendments, modifications, or changes to the terms, conditions, or minority, female, and disabled subcontractor plans in writing.

VI.2. USING DEPARTMENT

The contract administrator's duties are defined in the General Conditions of Contract between County and Contractor, Section J, item #6A.

VI.3. CONTRACT ADMINISTRATOR

The Contract Administrator for any contract resulting from this solicitation is Wade Holland, Office of the County Executive, 101 Monroe St, 2nd Floor, Rockville, MD 20850, 240-777-2623, wade.holland@montgomerycountymd.gov.

VII. ETHICS

As a result of being awarded a contract resulting from this solicitation, the successful contractor may be ineligible for the award of related contracts. In this regard, Montgomery County Code Sections 11B-52 (b) and (c) state the following:

A contractor providing an analysis or recommendation to the County concerning a particular matter must not, without first obtaining the written consent of the Chief Administrative Officer:

- (a) Assist another party in the matter or another person if the person has a direct and substantial interest in the matter;
or
- (b) Seek or obtain an economic benefit from the matter in addition to payment to the contractor by the County.

VIII. MONTGGOMERY COUNTY CODE AND PROCUREMENT REGULATIONS

The Montgomery County Code and Montgomery County Procurement Regulations are applicable to this solicitation and any contract awarded pursuant to this solicitation. Additionally, the County's General Terms and Conditions (Section IX below) will be incorporated into the contract resulting from this Informal Solicitation.

IX. GENERAL CONDITIONS OF CONTRACT BETWEEN COUNTY AND CONTRACTOR

(see link below)

<https://www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/PMMD-45.pdf>

ATTACHMENT A - ACKNOWLEDGMENT PAGE

1) ACKNOWLEDGMENT

The offeror must include a signed acknowledgment that all the provisions, terms and conditions of this solicitation are agreeable to the offeror and may, at the County's option, be made applicable in any contract issued as a result of this solicitation. Offers that do not include such an acknowledgment may be rejected. Executing and returning (with the offer) the acknowledgment shown below will satisfy this requirement.

The undersigned agrees that all the provisions, terms and conditions of this solicitation may, at the County's option, be made applicable in any contract issued as a result of this solicitation.

Business Firm's Legal Name
(printed):

Printed Name and Title of
Person Authorized to Sign
Proposal:

Signature:

Date:

2) NAME AND SIGNATURE REQUIREMENTS FOR PROPOSALS AND CONTRACTS

The correct and full legal business name of the offeror must be used in proposals received and on all contracts issued as a result of this solicitation. A trade name (i.e., a shortened or different name under which the firm does business) must not be used when the legal name is different. Corporations must have names that comply with State law, which requires a suffix indicating the corporate status of the business (e.g. Inc., Incorporated, etc.). Trade names may be indicated by individuals or corporations with the individual or corporate name followed by "t/a" (trading as) or "d/b/a" (doing business as), respectively. The offeror's signature on the proposal, contract, amendment(s) or related correspondence, must conform to the following:

All signatures must be made by an authorized officer, partner, manager, member, or employee. The signing of this offer or a contract is a representation by the person signing that the person signing is authorized to do so on behalf of the offeror or contractor.

ATTACHMENT B - REFERENCES

(submit at least three)

You are requested to provide references to the County with your proposal. The three (3) references must be from individuals or firms for whom work of a similar scope has been performed within the last three years. Names for references shall be of individuals who directly supervised or had direct knowledge of the services or goods provided.

NAME OF FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT PERSON: _____ PHONE: _____

EMAIL: _____ CELL PH _____

NAME OF FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT PERSON: _____ PHONE: _____

EMAIL: _____ CELL PH _____

NAME OF FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT PERSON: _____ PHONE: _____

EMAIL: _____ CELL PH _____

ATTACHMENT C - FEE SCHEDULE

The Offeror must provide fully burdened hourly rate, which must include all cost for overhead, cost of benefits, profits, etc. for the following services outlined below. The following job titles are illustrative of the expected roles performed by the Contractor, but the Offeror can submit alternative job titles as long as the alternative job titles can provide the services described in the Scope of Services:

LABOR CATEGORY	FULLY BURDENED HOURLY RATE (\$/hr)
Project Lead / Manager	
Workgroup Lead Facilitator	
Workgroup Supporting Facilitator	

Other key staff (Please list)*

LABOR CATEGORY	FULLY BURDENED HOURLY RATE (\$/hr)

*List labor category, job description, and fully burdened rate. (E.g. "Senior engineer, 7+ years experience in traffic and transportation research, analysis, planning and design, \$X/hour.")

Materials Cost

CATEGORY	FULLY BURDENED COST PER WORKGROUP SESSION
Printing and providing meeting materials and brainstorming tools as listed under Section I.5.2	\$__ per workgroup session