



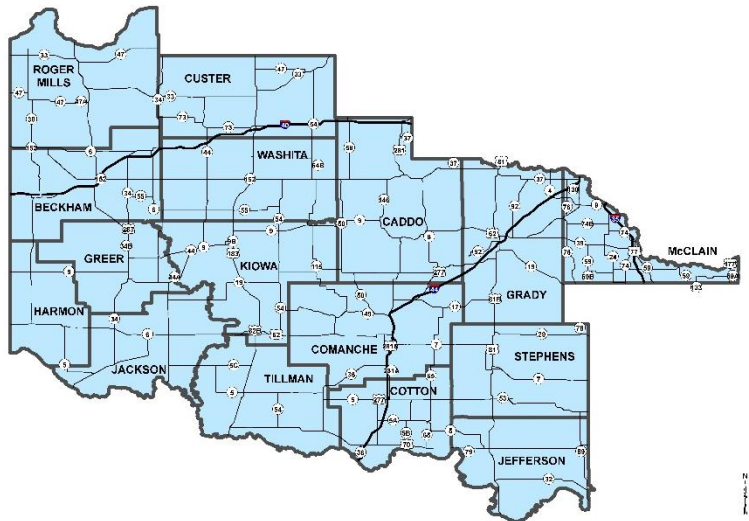
August 21, 2023

South Western Oklahoma Development Authority
420 Sooner Drive
PO Box 569
Burns Flat, Oklahoma 73624

Subject: Request for Proposal for Regional Transportation Plan

Greetings,

The South Western Oklahoma Development Authority (SWODA) and the Southwest Oklahoma Regional Transportation Planning Organization (SORTPO) are excited to announce that we are seeking proposals for the development of a comprehensive Regional Transportation Plan for the SORTPO region representing the counties of Beckham, Caddo, Comanche, Cotton, Custer, Grady, Greer, Harmon, Jackson, Jefferson, Kiowa, McClain, Roger Mills, Stephens, Tillman, and Washita.



The Regional Transportation Plan will serve as the guiding document that outlines a strategic vision, goals, and actionable strategies to address the current and future transportation challenges.

Project Overview: The objective of this Request for Proposal (RFP) is to select a qualified consultant or consulting team with substantial experience in transportation planning to develop a comprehensive Regional Transportation Plan. The plan should take into account various transportation modes, including but not limited to roadways, public transit, active transportation (walking and cycling) as well as collecting and analyzing data to ensure the transportation system operates safely, efficiently, and equitable across the region.

The selected consultant/team will be responsible for:

1. Conducting a thorough analysis of the current transportation infrastructure, systems, and services in the region.

2. Engaging with stakeholders, including government agencies, local communities, transportation operators and the public to gather input.
3. Assessing future transportation needs and challenges, considering factors such as population trends, economic development, emerging technologies, and federal rules.
4. Developing a strategic vision, goals, and strategies for the Regional Transportation Plan.
5. Formulating data driven and evidence-based recommendations for improving the transportation system, ensuring efficiency, accessibility, and equity.
6. Outline a prioritized list of transportation projects, along with estimated costs, potential funding sources and responsible agency/entity.
7. Create short term and long-term actions, milestones, and performance measures.

Proposal Submission: Interested consultants or teams are requested to submit their proposals to

Julie Sanders, Transportation Director
RFP Regional Transportation Plan
SWODA
420 Sooner Dr./PO Box 569
Burns Flat, Ok 73624

The deadline for submission is September 11, 2023, 5:00 pm CST

The proposal should include the following key components:

1. Cover letter. A brief introduction of your organization, its expertise, and a statement of your understanding of the project requirements.
2. Qualifications. An overview of the consultant/team's experience, including previous transportation planning projects and successful outcomes.
3. Approach and Methodology. A detailed explanation of how you intend to approach the Regional Transportation Plan development, including engagement strategies, data collection methods and analysis techniques.
4. Project Timeline. A comprehensive project schedule outlining the key milestones and estimated timelines for each phase of the project.
5. Team Members. Resumes of key team members who will be involved in the project, highlighting their relevant experience and expertise.
6. Budget. A clear and itemized breakdown of the project cost, including all expenses related to the plan's development.

Selection criteria: The selection of the consultant/team will be based on the following criteria:

1. Demonstrated experience and expertise in transportation planning.
2. Innovated and data-driven approach to address transportation challenges and foster sustainable solutions.
3. Successful engagement and collaboration with stakeholders in previous projects.
4. Timeliness and cost-effectiveness of the proposed approach.
5. Availability and qualifications of key team members.
6. Overall clarity, quality, and completeness of the proposal

Important Dates:

RFP Release Date:
Pre-Proposal Meeting (Optional):
Proposal Submission Deadline:
Finalist Selection and Notification:
Project Start Date:

Please direct any inquiries or requests for clarifications to

Julie Sanders, Transportation Director
RFP 22-01
SWODA
420 Sooner Dr./PO Box 569
Burns Flat, Ok 73624

We look forward to receiving your proposals and finding a reliable partner to collaborate on this critical Regional Transportation Plan. Together we aim to create a sustainable, efficient, and accessible transportation network that will benefit our region for years to come.

Thank you for your interest and participation.

Julie Sanders

Julie Sanders
Director of Transportation, SWODA
PO Box 569
Burns Flat, OK 73624
w. 580-562-4880

REQUEST FOR PROPOSALS (RFP)
Develop a Regional Long Range Transportation Plan
for the Southwest Oklahoma Regional Transportation Planning Organization

Funding: Rebuilding American Infrastructure with Sustainability and Equity (RAISE)
Award No. #693JJ32340007, \$1,500,000.

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Section 1. BACKGROUND AND OVERVIEW

Background - South Western Oklahoma Development Authority (SWODA) is soliciting proposals from qualified firms to develop the Southwest Oklahoma Regional Transportation Plan (RTP) for the Southwest Oklahoma Regional Transportation Planning Organization (SORTPO). In August 2022, SWODA was awarded a \$1.5 million Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant for the purpose of developing the RTP.

SORTPO serves as the regional planning organization for southwest Oklahoma. The Region encompasses 14,180 square miles (Map 1.1). The SORTPO region is comprised of sixteen (16) counties, one hundred-twenty (120) cities and towns and nineteen (19) conservation districts. Total population for the SORTPO region according to the 2020 U.S. Census Bureau was 411,859.

The regional transportation planning process provides for the identification and consideration of strategies, projects and policies that meet the regional transportation needs. This process includes asking the following questions:

1. Where are we now? – Current conditions, issues.
2. Where do we want to go? - Goals and objectives.
3. How are we going to get there? – Development of policies and procedures to prioritize projects.
4. Who will implement the LRTP? – Implementation matrix.

Much of the region is comprised of large tracts of farming and agriculture lands. There are multiple areas that contain urbanized areas that feature regional medical facilities, universities, military installations, and governmental offices. Population growth and shifts for the SORTPO region are dependent on many factors depending on a county. Each county in the region although a separate entity is interconnected through commerce, employment, health services, education, and transportation.

As the region continues to expand and further develop, proper planning is a critical factor in facilitating mobility for people and goods movement within and through the area. Businesses and industry must be able to locate in areas that provide uninterrupted planning, opportunities for delivering and receiving goods, and viable ways in which to access a trained, educated workforce. Without sufficient mobility and accessibility, the SORTPO Region cannot sustain the forecast demand of economic growth; businesses and manufacturers will be unable to move supplies and employees in and goods out.

The project will be developed in accordance with The Infrastructure Investment and Jobs Act (IIJA), the Fixing America's Surface Transportation (FAST) Act, the Federal Planning Emphasis Areas and the 10 National Planning factors. The Regional LRTP: Southwest Oklahoma Moving People and Goods will have a 20-year planning horizon.

Overview

This project will build off past planning efforts and involve the development of a 20-year Regional Transportation Plan addressing key mobility needs to provide better travel choices. The Plan will address the following focus areas:

- ✓ Mobility- Developing a framework for community mobility through safe, accessible multi-modal options; creating a balanced transportation system.
- ✓ Transportation Equity- Encouraging transportation choices and access across modes and demographics in all transportation decisions.
- ✓ Technology and Connectivity- Identifying and planning for emerging technologies or potential social changes, such as autonomous vehicles, smart grids, intelligent transportation technology, alternative fuel corridors and vehicles, increasing automation, and envisioning how technology can enable better connectivity and interaction with local government and support various community priorities.
- ✓ Safety – Reducing collisions and creating a safe environment for all users.
- ✓ Public Engagement- Development and implementation of an innovative and inclusive public outreach and engagement strategy will be crucial.
- ✓ Strategic Implementation- Development of implementation criteria across all areas of the region’s multi-modal transportation system including short-term, mid-term and long-term needs with phasing and funding – while addressing gaps and eliminating overlaps.

Section 2. SCOPE OF WORK

SWODA intends to hire a qualified firm to prepare the Regional Transportation Plan: Southwest Oklahoma Moving People and Goods with a FFY 2022 RAISE grant. The scope of work outline below provides guidance to consultant teams by outlining the major elements identified for this effort. SWODA/SORTPO encourages innovative and thoughtful proposals that demonstrate an understanding of the task outlined as well as other potential creative and forwarding thinking ideas and tasks that may be beneficial to incorporate during development of the plan. SWODA/SORTPO expect a high level of innovative public engagement throughout the entire project. For each task below, a preliminary plan for outreach is jointly detailed during the work plan finalization and drafting of the public engagement plan.

The successful responder must demonstrate a strong knowledge of federal, state, and regional transportation planning requirements, innovative public engagement techniques, data development and collection abilities representative of the region and economic development planning capabilities for the preparation of a comprehensive and strategic RTP.

The consulting firm is encouraged to provide as much information as possible for each task listed in their proposal. The consulting firm will be responsible for managing the project and ensuring project milestones are met. At a minimum, the proposal will address:

- ✓ Project management.
- ✓ Kick-off Meeting with all team leaders and key personnel.
- ✓ Meetings with SORTPO Advisory Committee, Technical Committee and Policy Board.
- ✓ Project schedule for each Task.
- ✓ Data Development.
- ✓ Public Engagement.
- ✓ Project Status Meetings.

Task 1: Project Kickoff, Work Plan Finalization and Project Management

This task will include time for the consultant project manager to conduct internal/external coordination calls/meetings, develop project management and communications plans and

perform administrative functions such as Question-Answer/Question-Comment QA/QC, invoicing, and monitoring sub consultant work. SORTPO staff will meet with the selected proposer to revise or amend as necessary the final scope of work, and more precisely define work tasks, responsibilities of parties, deliverable dates including a consultant-led project kick-off meeting with the Advisory Committee, SORTPO Technical Committee and SORTPO Transportation Policy Board in attendance, project schedule requirements and final project cost. The consultant will conduct monthly project status meetings with the Director of Transportation and other key staff and consultant team via conference calls and in person meetings. The project manager and other key team members will also meet with the SORTPO Technical Committee, SORTPO Policy Board and SORTPO Regional Plan Advisory Committee to provide updates on the LRTP tasks and solicit input.

Task 1: Deliverable 1

- a. Refined scope of work with detailed tasks and objectives.
- b. Detailed schedule identifying key milestones and deliverables.
- c. Public engagement plan which includes: a defined strategy on how to engage typically hard-to-reach groups such as young adults, seniors, disabled and other disadvantaged groups.
- d. In consultation with Oklahoma Challenge identify opportunities to engage target age group 16-24 in townhall meetings, surveys, and other outreach opportunities.
- e. Staffing plan which identifies consultant and SORTPO staff roles.
- f. Final Contract.

Task 2: Conditions, Data Inventory & Collection

This task will provide a comprehensive understanding of the Region’s conditions, emerging trends, and collection of data. SORTPO desires to understand the region’s transportation system including but not limited to freight movement/activity, active and healthy living, clean energy/resilience, public transportation, safety, and economic development, identification of barriers that impede development, barriers to access to services, and infrastructure investment. With an understanding of that purpose, successful proposers shall identify data sources and activities that satisfy this task. A preliminary list of data that will need to be collected is identified in Table 1.

Policy and Plan Review

The Consultant will review the information listed below and with information collected in Table 1 and develop an analysis with supporting graphics/maps that will be basis for the planning effort by creating a snapshot of the region in 2023.

- ✓ <https://sortpo.org/southwest-oklahoma-regional-transportation-plan/>
- ✓ <https://www.acogok.org/transportation-planning/encompass-2045-plan/>
- ✓ <https://www.oklongrangeplan.org/>, <https://oklahoma.gov/odot/programs-and-projects/transit-programs/oklahoma-public-transit-policy-plan.html>, <https://okstatefreight/>, <https://www.okatp.org/>, [ODOT Vulnerable Road User Analysis, ODOT Freight Plan, ODOT Mobility Plan, ODOT Coordinated Human Service Providers Plan \(currently being updated\)](#)
- ✓ [SORTPO Active Living Map](#)
- ✓ Comprehensive Economic Development Strategies (CEDS) ASCOG and SWODA
- ✓ Joint Land Use Study (JLUS) – Altus Air Force and Fort Sill.
- ✓ Lawton MPO - <http://www.lawtonmpo.org/publication-resources/>

Table 1: Task 2.

<p>Transportation System Inventory by Traffic Analysis Zone (TAZ) and County</p>	<ul style="list-style-type: none"> • Airports • Barriers to vulnerable populations • Bicycle and pedestrian, trails infrastructure/facilities inventory (condition, type, width, accessible) • Collision data, number of licensed drivers, registered vehicles by type • Environmental Justice by Transit service areas/access • Freight movement, commodities, rail, road, and air for the SORTPO Region, freight road network/corridors and freight assets • Intelligent Transportation System (ITS) Signal Inventory • On system and off system bridges, structurally deficient • Pavement condition, width and material type for roads classified as collectors, minor arterials, and principal arterials. • Pavement Quality Index ratings • Railroad crossings, unprotected, passenger • Railroads, freight • Roadways by classification, Level of Service, Lane miles • Roadways, 2 lane highways no shoulders • Traffic counts- pedestrians, bikes, cars, trucks • System Performance and Federal Performance Targets • Transit Ridership and Access, facilities, service area, headways, riders per revenue hour, high ridership routes/stops • Vehicle Miles Travel
<p>Economic by TAZ and County</p>	<ul style="list-style-type: none"> • Housing Mix • Generators/attractors • Major employers • Development activities/locations • Job/Housing Balance
<p>Socioeconomic data by TAZ and County</p>	<ul style="list-style-type: none"> • Population (2020 Decennial Census, American Community Survey Data, 5 year) • Housing Type (2020 Decennial Census, American Community Survey Data, 5 year) • Race, Age, Gender, geographic distribution (2020 Decennial Census, American Community Survey Data, 5 year) • Persons with Disabilities (2020 Decennial Census, American Community Survey Data, 5 year) • Linguistics (2020 Decennial Census, American Community Survey Data, 5 year) • Justice 40 Population (2020 Decennial Census, American Community Survey Data, 5 year) • Means of Transportation (2020 Decennial Census, American Community Survey Data, 5 year)

	<ul style="list-style-type: none"> • Travel Time (2020 Decennial Census, American Community Survey Data, 5 year) • Income, Poverty (2020 Decennial Census, American Community Survey Data, 5 year) • Veterans (2020 Decennial Census, American Community Survey Data, 5 year) • Labor Force (2020 Decennial Census, American Community Survey Data, 5 year) • Businesses by TAZ (2020 Decennial Census, American Community Survey Data, 5 year) • Density (2020 Decennial Census, American Community Survey Data, 5 year) • Vehicles by Occupied Housing (2020 Decennial Census, American Community Survey Data, 5 year) • Commute to Work (2020 Decennial Census, American Community Survey Data, 5 year) • Mean Travel time (2020 Decennial Census, American Community Survey Data, 5 year)
Environment	<ul style="list-style-type: none"> • Significant natural features • Floodplain • Areas of Ecological Significance (Wetlands) • Agricultural uses • Sensitive land areas • Barriers impacting vulnerable populations accessing services and transportation. • Congestion • Air Quality (Ozone and PM2.5)

Deliverable 2

1. Inventory of available data and identification of data gaps. Provide written reasoning for the data selection and detail any work that will need to be done to update or fill any gaps in the data.
2. In coordination with SORTPO identify data sources that are to be used for this project, obtain the data for the project, and refine data (by TAZ) for the SORTPO region.
3. Establish a data pool and standardize a portfolio of data and geo references.

Task 3 – Existing Conditions and Future Growth and Trends

To help develop the goals and strategies for the plan, the consultant will provide a comprehensive review of the existing conditions and future conditions/trends that can be anticipated. This task is closely related to Task 2 and is intended to understand existing and future conditions and needs for the SORTPO future over the next 20 years, assuming current trajectory of conditions and policies.

As in Task 2, SORTPO envisions the product of this analysis to support the planning effort. A preliminary set of data categories to be collected and mapped in ARCGIS are listed in Table 2. Data needs listed in this table are not inclusive; collection or purchase of data may be required. This data will be collected and displayed by TAZ.

Table 2. Task 3.

Description	Data Needs
Population	<ul style="list-style-type: none"> • Population forecast • Demographic projections (race, age, geographic) • Transit-specific market growth (students, low-income, zero-vehicle households, seniors, multi-family residents, etc.) • Health indicators (such as obesity rates, nutrition, mortality, access to care) • Environmental Justice (EJ) and vulnerable populations
Land Use	<ul style="list-style-type: none"> • Future land use patterns • Future community facilities (parks, natural areas, recreation centers, etc.)
Transportation	<ul style="list-style-type: none"> • Freight movement (roadway, rail, and air) • Railway projections • Existing and projected transit ridership • Projected mode share for bicycling and walking • Roadway (projected vehicle miles traveled, volume, speed) • Roadway improvements • Railroad improvement • Safety improvements. • Bicycle and pedestrian improvements
Economy	<ul style="list-style-type: none"> • Incomes, distribution • Workforce • Economic development opportunities/impacts
Safety	<ul style="list-style-type: none"> • Collision/accidents for pedestrian, bicyclist, motorcycles • School zones on US and State highways • Collisions by type of vehicles, trucks • Trains • Types of collisions • Collision locations • Collision ratings
Project list	<ul style="list-style-type: none"> • Existing / planned projects (municipal, county, state and tribal) • Projects identified by communities, stakeholders, surveys, etc.

Deliverable 3 -

1. Future conditions – trends
2. Future land use, transportation, and infrastructure needs
3. Population and employment projection and EJ data by region, county, and urban area by TAZ.
4. Transportation needs by TAZ.
5. Alternative fuel corridors and EV fueling build out. (Refer to ODOT NEVI Plan)
6. Land use patterns
7. Freight movement by county/region and state
8. Projected transit ridership, Mobility Management Program
9. Safety Data

Task 4 - Public & Stakeholder Engagement & Participation

Task 4 will include time for the Consultant team to interact with the public and stakeholders. The consulting firm will be responsible for developing an outreach and public engagement strategy, producing, and distributing outreach materials, conducting public meetings, stakeholder interviews, and developing various surveys to collect information related to freight movement and meeting with the RAISE Advisory Committee (RAC) The consulting firm will be responsible for coordinating meetings with RAC to identify challenges and opportunities and performance measures specific to southwest Oklahoma, identify stakeholders, establish goals and strategies, and receive input on draft data/reports and maps.

The consultant will develop a minimum of five fact sheets during the RTP planning process. The fact sheets will be created in a way that converts complex findings regarding needs, resources, issues and trends into summaries, graphics and data visualizations that can be easily understood by targeted audiences. To be cost effective, the fact sheets will be designed so they can be easily repurposed and posted to SORTPO's website and Facebook. Based on the results and guidance from previous work and public outreach, this task will revisit the existing goals and objectives from the previous plans then adjust as appropriate. Based on the information and understanding from Tasks 2 and 3, an initial set of goals, objective, and strategies statements will be developed.

Deliverable 4

1. Public Involvement Plan update analysis of EJ and Justice40 populations.
2. Limited English Proficiency Plan update.
3. Identify and facilitate meetings with stakeholders and residents. In consultation with Oklahoma Challenge incorporate the age group 16-24 in townhall meetings, surveys, and other outreach opportunities. Establish measurables to ensure that target populations are participating.
4. Highly visible meeting material, graphics, fact sheets and maps. Material for vision/hearing impaired participants.
5. Material and results from Stakeholder interviews, town hall meetings and other meetings.
6. Develop, distribute and analysis of a regional survey (individual, stakeholder, truckdriver, transit, non-motorized, and health).
7. Update the SORTPO website based on staff's suggestions and input from RAC.
8. Meetings: Throughout the RTP process a minimum of 20 in person public meetings (includes stakeholder meetings, town hall meetings, workshops) in the ASCOG Region and a minimum of 20 in person public meetings in the SWODA region (excluding scheduled Technical and Policy Board meetings).
9. With SORTPO staff assistance, set up project coordination meetings with the RAC that will guide the development of the RTP.
10. Schedule, facilitate, and sponsor two Walkability Facilitator Trainings (one in Duncan and one in Altus or Weatherford). The Facilitator for these trainings will be cross disciplinarian expert in transportation engineering, public health, and land use. The selection of the Facilitator will be in coordination with the SORTPO Director of Transportation.
11. Advertisement and educational materials for publication to be used for public engagement.
12. Develop a stakeholder contact list by mode of transportation.

Task 5 RTP Development

Based on the results and guidance from previous work and public outreach, this task will revisit the existing goals and objectives from the previous plans then adjust as appropriate and development of the plan. Based on the information and understanding from Tasks 2 and 3, an initial set of goals, objective, and strategies statements should be developed.

These initial statements must be presented to the stakeholders for input, comment, and to help further refine and create a final set. The level and type of outreach will be determined as part of the public engagement plan but should be robust and creative and include a broad cross-section of the region, stakeholders' groups, and community members. This task also includes consideration of freight, safety, bicycle, pedestrian, and transit-specific statements, which will define the desired level of service and related policies.

Deliverable 5

1. Goals, objectives, and strategies.
2. Freight, safety, bicycle, pedestrian and transit-specific statements and related policies.
3. ARC GIS maps/data for design and analysis work and use by municipalities, counties, stakeholders, and agencies in southwest Oklahoma.
4. Existing conditions, challenges, opportunities, and issues.
5. Projected future conditions and needs for employment, population, environmental, road, safety, transit, active living, and healthy communities' transportation needs and evaluate impact on EJ populations.
6. Chapters to be developed in a manner that the content can be utilized a standalone document
 - a. Safety - this Chapter will meet the requirements for the Safe Streets and Roads for All (SS4A) Discretionary Grant Opportunity.
 - b. Freight – Identify needs and forecast of freight movements, freight trends and needs, inventory of bottlenecks and safety concerns, regional road freight routes, and projects that will enhance and meet the projected freight movement needs, multimodal critical rural freight facilities and corridors, innovative technologies and operational strategies that improve the safety and efficiency of freight movement, description of improvements that may be required to reduce or impeded deterioration caused by heavy vehicles, impact of Ecommerce on freight infrastructure in the region, considerations of military freight, impacts of freight movement on local air pollution, flooding/stormwater runoff and wildlife habitat loss.
 - c. Economic Development – Examine the Comprehensive Economic Development Strategies and state policies to strengthen the relationship between transportation and economic development needs of the region.
 - d. Active Living – Utilizing the Active Living map identify future linkages to connect towns/cities/parks/work and education sites. Identify opportunities to enhance the role of active/healthy living and its impact on the region. This task will include conducting two (2) Walkability Assessments with a featured speaker that is recognized in the industry. Identify opportunities for regional connectivity of parks, recreation areas, education facilities, health centers, employment centers and social service agencies.

- e. Public Transportation – Examine the current transportation /mobility needs for transit dependent population and identify strategies to increase opportunities for linking the public with transit trips.
- f. Equity – Description of process on how the RTP was developed through engagement with rural, underserved, and disadvantaged communities and stakeholders and how the Plan reflects that engagement.
- g. Clean Energy/Technology - Examine and identify the region’s ability to address and/or implement alternative fuel charging, ensure compliance with ODOT NEVI and USDOT/EPA requirements for clean energy. Identification of technology and innovative programs/systems that enhance quality of life and reduce emissions.
- h. Resilience – Identify the immediate and long-range planning activities and investments of the region with respect to resilience of the surface transportation system. This will include a risk-based assessment of vulnerabilities of transportation assets and systems to current and future weather events and natural disasters.

Task 6 Administrative

Regular communication (minimum weekly via phone/email) shall take place between the consulting firm’s project manager and the SORTPO Director of Transportation. The consulting firm will be responsible for documenting all communications and delivering them to SORTPO. Meetings shall require meeting minutes to be prepared, whereas phone conversations shall simply require a follow-up email summarizing talking points and decisions made. These should be provided to SORTPO Transportation Director within three business days.

The consulting firm shall provide written status updates monthly by the 10th to SORTPO Transportation Director via email. The status updates should describe tasks completed including the status of DBE firm(s), upcoming tasks for the next four weeks, any delays that affect the schedule of the project, and any assistance that will be needed from SORTPO or other stakeholders in the coming weeks. The consultant is to produce a detailed work schedule, including the expected meeting dates, the task completion dates, and the bi-weekly conference call update schedule. The consultant must submit monthly invoices no later than the 5th of the month.

Deliverables

Deliverable 6

- 1. Documenting all comments/communications from meetings, stakeholder conversations, advisory committee and website/surveys submitted to SORTPO.
- 2. Monthly written updates to SORTPO.
- 3. Work schedule.
- 4. USDOT/FHWA reporting monthly, quarterly, annually.

Section 3. PROPOSAL STRUCTURE

The proposal must address all elements of the scope of work as outlined within the section below. Any modifications or enhancements proposed beyond the identified scope of work outlined within this document must be clearly and concisely identified.

Plan Proposal Format

The proposal cannot exceed **20 pages** (either 20 single-sided pages or 10 double-sided pages) in length. The proposal title page is NOT counted within the 20-page limit. Please use 11-point font size or larger for readability. Any text beyond 20 pages will not be reviewed. Appendices are not allowed and will not be reviewed. Proposals should demonstrate that the responder fully understands the intent of the project, the required deliverables, and the plan development process. In addition, the level of technical qualifications needed to supply the required services must be clearly demonstrated. To assist in the evaluation process, please include the following requirements in the proposal document:

Project Approach/Work Plan

Cover Letter (no more than one page and counts within 20-page limit). The letter must be signed in ink by an individual with authority to legally represent the proposer to the work proposed by the company or team.

This section should include a detailed description of the proposer's understanding of the intent of the project and its objectives, the character of the required deliverables, and overall approach to the project. The proposer should identify the level of assistance required from SORTPO and/or Project Partners to complete each task.

A schedule (in Gantt chart form) showing all milestones, critical stakeholder meetings and deliverables to maintain project progress by the project end date.

Introduction to the Proposer(s)

Consulting firms shall provide the following information. (The same information must be provided for each sub-consultant or each member of a joint venture):

- i. Consulting firm name and business address, including telephone number and email contact.
- ii. History of the consulting firm.
- iii. Identify the state in which the consulting firm was organized or incorporated.
- iv. Type of ownership, and name and location of parent company and subsidiaries, if any.
- v. A Table of Organization depicting the proposed project team.
- vi. Number of full-time employees, Part-time employees or consultants routinely engaged by the consultant may be included, if clearly identified as such.
- vii. Any additional information you believe appropriate for the SWODA's use in determining your capabilities and qualifications to perform the type of work encompassed by that particular contract.

Qualifications and Experience of the Consulting Firm(s)

Please describe recent experience relevant to this project. Include brief project profiles as well as a key project reference with address, phone, and email contact information for each profile. Emphasis should be placed on projects managed by the key personnel proposed for this project. If the respondent anticipates the use of sub-consultants, the respondent shall identify:

- i. The role and extent to which these parties will participate in the project.
- ii. The means by which the consultant will oversee the work of these parties.
- iii. The experience and credentials of these parties relevant to this project.
- iv. References: Please submit names, addresses, and phone numbers of at least two references familiar with the sub-consultant's ability, experience, and reliability in the performance and management of projects of a similar nature.

Qualifications and Experience of Key Staff

Identify key individuals to be assigned to this project and include the function and/or responsibility of each of the identified individuals. Experience summaries of these key individuals shall be provided, with emphasis on previous experience on similar projects in similar roles. Resumes of these key individuals may be included within the 20-page limit if desired. NOTE: If any of the above requirements are not met, the responder's proposal may not be considered.

Submittal Instructions

Submit five (5) hard copies of the RFP response and one (1) digital copy that exactly matches the hard copies submitted. The digital copies should be saved as Adobe PDF files (reduced size) and e-mailed to julie@swoda.org by the proposal deadline date and time. Number all pages consecutively. Clearly indicate the following on the outside of each proposal submittal package:

Elements required in submission include:

- i. Signed Cover Letter that indicates review and acceptance of SWODA/SORTPO Standard Contract Agreement boilerplate or enumerates proposed changes thereto. Technical Proposal one hard copy and one electronic copy.
- ii. Narrative that reflects the requirements of the Scope of Work.
- iii. A detailed approach to completing the work program.
- iv. List and description of deliverables.
- v. Any issues or problems with requirements of the Scope.
- vi. Consulting firm Profile
- vii. Description of the consulting firm's facilities, number of offices, employees in each office, any special equipment, and other factors (knowledge, skills, etc.) that may affect the delivery of the required services.
- viii. Work History – List of similar work, including the name and telephone number of the clients, and a full description of the services provided by the consulting firm.
- ix. Organizational Chart of consulting firm(s) with brief description of their role in the project.
- x. Staffing Plan. A detailed description of the consulting firm key staff for this project and estimated hours required on the project, including:
 - a. Staff name
 - b. Company/organization
 - c. Job Title

- d. Person-hour requirements by task
- e. Resumes of key professional staff included in the Staffing Plan, organized by the consulting firm.
- xi. Project Schedule – Indicating project milestones, deliverables, and key meetings using a Notice to Proceed as “Day 0.” Schedule should anticipate review time by other agencies and committees, but time allotments for work under the control of the consultant will be regarded as a commitment.
- xii. Cost Proposal (one (1) hard copy and one (1) electronic copy in a sealed envelope, separate from the Technical Proposal.
 - 1. Total Costs of each task detailed in the scope of work.
 - 2. Breakdown of All Other Charges, such as fringe benefit, overhead, profit, etc., yielding a total project cost.

Consultant Selection Process

The evaluation process will involve review of each submitted proposal received by deadline date and time by the project selection committee based on the criteria outlined below. A list of responders will be developed in order of preference based on proposal content and, if desired by the selection committee, a check of references may be performed. The proposal evaluation criteria, with corresponding weight factors, consist of the following:

Regional Transportation Plan Development Experience: 35 percent

Demonstrated experience in creating regional or state freight plans, working with diverse groups of stakeholders and ability to prepare user-friendly planning products (written reports and web-based reports).

Capability and Qualifications: 25 percent

Qualifications of the consultant firm and personnel (including any subcontractors) to be assigned to this project demonstrating the consultant’s capacity to complete requested services, their experience completing similar projects, including experience with data collection and analysis related to the scope of work elements.

Project Understanding and Method of Approach: 25 percent.

Demonstration of overall project understanding and clarity of the proposal and creativity/thoroughness in addressing the project objectives and deliverables outlined in the Request for Proposals (RFP).

Submittal Completeness: 10 percent

Completeness of submitted proposal with all elements required by the RFP and demonstrated effort to solicit/include Disadvantaged Business Enterprise (DBEs), Minority Business. A statement that identifies your consulting firm’s strategy in meeting the proposals’ goal of 3.0% of funding be awarded to a DBE with an office in the SORTPO Region. A letter from ALL sub-consultants, on that consulting firm’s letterhead stating the intent to participate in the contract is required. If the prime consultant is a DBE, identify this in the statement.

Relevant References: 5 percent

References to previous similar work, including work performed such as regional freight/planning studies, intermodal or planning, or truck and/or rail planning. SWODA reserves the right to seek clarification of any submitted proposal, reject all proposals received because of this solicitation, to negotiate with any qualified source, to

waive any formality and any technicalities or to cancel in part or in its entirety this RFP if it is in the best interests of SWODA. This solicitation of qualifications in no way obliges SWODA to award a contract. A concise list of qualified consultants will be selected from the submitted proposals for follow-up interviews. The interview format will include an oral presentation from the consultant, to be followed by a question-and-answer period. Interviews will be scheduled during the week September 25 – 29th at the SWODA office or ODOT office. TEAMS or an equivalent platform for interviews may be considered depending upon circumstances.

If in the judgment of SORTPO changes in the contents of the RFP are required, an addendum will be issued by SORTPO. Any addendum that may be issued will be posted on the SORTPO website at www.SORTPO.org by 5 pm CST on September 7th. The consultant team will be required to provide a written letter to acknowledge their receipt of the addendum and inclusion as part of their submission. This additional letter shall be one page and will not be subject to the page limit requirement.

Additional Information

SORTPO reserves the right to award the contract to any qualified responder. Ten percent of total contract cost will be withheld as retainage pending successful project completion. All submittals become the property of the SORTPO upon submission. The cost of preparing, submitting, and presenting qualifications lies solely with the responder.

All data, databases, reports, designs, and materials in digital and hard copy format created under this project shall be transferred to the SORTPO upon completion of the project and become the property of the SORTPO.

Modification or Withdrawal of Proposals:

Proposals may be modified or withdrawn by the offeror prior to the established due date and time.

Minor Informalities:

Minor informalities are matters of form rather than substance evident from the response or insignificant mistakes that can be waived or corrected without prejudice to other vendors. The Director of Transportation may waive such informalities or allow the vendor to correct them depending on which is in the best interest of the project.

A proposal submitted in response to this RFP shall constitute a binding offer. The autographic signature of a person who is legally authorized to execute contractual obligations on behalf of the offeror shall indicate acknowledgment of this condition. A submission in response to this RFP acknowledges acceptance by the offeror of all terms and conditions as set forth herein. An offeror shall identify clearly and thoroughly any variations between its proposal and the RFP in the cover letter. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

Protested Solicitations and Awards:

Right to protest. Any actual or prospective bidder, offeror or contractor who is aggrieved in connection with the solicitation or award of a contract must protest in writing to the Director of Transportation as a prerequisite to seeking judicial relief. Protestors are urged to seek informal resolution of their complaints initially with the Purchasing Manager. A

protest shall be submitted within ten (10) calendar days after such aggrieved person knows or should have known of the facts giving rise thereto. A protest with respect to an invitation for bids or request for proposals shall be submitted in writing prior to the opening of bids or the closing date of proposals, unless the aggrieved person did not know and should not have known of the facts giving rise to such protests prior to bid opening or the closing date for proposals.

Confidential/Proprietary Information:

All proposals will be confidential until a contract is awarded and fully executed. At that time, all proposals and documents pertaining to the proposals will be open for public inspection, except for material that is proprietary or confidential. Neither a proposal in its entirety, nor proposal price information will be considered confidential/proprietary.

Acceptance of Proposal Content:

The contents of the proposal (including persons specified to implement the project) of the successful contractor shall become contractual obligations into the contract award. Failure of the successful offeror to perform in accordance with these obligations may result in the cancellation of the award and such offeror may be removed from future solicitations.

RFP Response/Material Ownership:

All material submitted regarding this RFP becomes the property of SWODA.

Incurring Costs:

SWODA is not liable for any cost incurred prior to the issuance of a legally executed contract and/or a purchase order.

Non-Discrimination:

The offeror shall comply with all applicable state and federal laws, rules and regulations involving non-discrimination based on race, color, religion, national origin, age, or sex.

Taxes:

SWODA is exempt from all federal excise taxes and all Oklahoma State and local government sales and use taxes. Where applicable, the contractor will be responsible for payment of use taxes.

Assignment and Delegation:

Neither party to any resulting contract may assign or delegate any portion of the agreement without the prior written consent of the other party.

Standard of Conduct:

The successful consulting firm shall be responsible for maintaining satisfactory standards of employees' competency, conduct, courtesy, appearance, honesty, and integrity, and shall be responsible for taking such disciplinary action with respect to any employee as may be necessary.

SWODA may request the successful firm to immediately remove from this assignment any employee found unfit to perform duties due to one or more of the following reasons:

Neglect of duty:

- f. Disorderly conduct, use of abusive or offensive language, quarreling, intimidation by words or actions or fighting.

- g. Theft, vandalism, immoral conduct, or any other criminal action.
- h. Selling, consuming, possessing, or being under the influence of intoxicants, including alcohol, or illegal substances while on assignment for SWODA.

Reporting Requirements:

Awardee must submit monthly, quarterly, annual, and other reports and updates as required by the FY 2022 RAISE Grant NOFO.

Invoicing and Payment

Upon submission of an accurate and proper invoice, the invoice shall be paid in arrears after products have been delivered or services provided and in accordance with applicable law. Invoices shall contain the purchase order number, a description of the products delivered, or services provided, and the dates of such delivery or provision of services. An invoice is considered proper if sent to the proper recipient and goods or services have been received.

Payment terms will be net 45.

Audit and Records Clause

As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with SWODA, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract. The successful supplier(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

Choice of Venue

Venue for any action, claim, dispute, or litigation relating in any way to the Contract shall be in Washita County, Oklahoma.

Termination

The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the procuring agency. SWODA may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.

- SWODA may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the Executive Director determines that an administrative error occurred prior to Contract performance. If the Contract is terminated, SWODA shall be liable only for payment for products and/or services delivered and accepted.
- SWODA may terminate the Contract, in whole or in part, for convenience if the Executive Director determines that termination is in the SWODA's best interest.

The Executive Director shall terminate the contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Executive Director issue the Notice of Termination for Convenience.

If the Contract is terminated, SWODA shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the supplier received the Notice of Termination for Convenience.

Insurance

The consultant and subrecipient(s) shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the procuring agency with evidence of such insurance and renewals.

Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify .

Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

Form of Contract

A contract is to be used as the agreement between the SWODA and the successful Vendor. The contract will contain the following Federal Clauses, Terms and Conditions.

- i. The contract will include and expressly incorporate by reference the FHWA Federal Register Final Rule 88 FR 12724. Minimum Federal statutory requirements can be found in the FY 2022 NOFO RAISE grant.
- j. All statutory and regulatory requirements that are applicable to funds apportioned under chapter 1 of Title 23, United States Code, and the requirements of 2 CFR part 200 apply.
- k. This includes the applicable requirements of 23, United States Code, and Title 23, Code of Federal Regulations, such as the applicable Buy America requirements at 23 U.S.C. 313 and Build America, Buy America Act (Pub. L. No 117-58, div. G sections 70901-70927).
- l. The American with Disabilities Act of 1990 (ADA), and implementing regulations, apply to EV charging stations by prohibiting discrimination on the basis of disability by public and private entities. EV charging stations must comply with applicable accessibility standards adopted by the Department of Transportation into its ADA regulations (49 CFR part 37) in 2006 and

- adopted by the Department of Justice into its ADA regulations (28 CFR parts 35 and 36) in 2010.
- m. Title VI of the Civil Rights Act of 1964, and implementing regulations, apply to this program to ensure that no person shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.
 - n. All applicable requirements of Title VIII of the Civil Rights Act of 1968 (Fair Housing Act), and implementing regulations, apply to this program.
 - o. The Uniform Relocation Assistance and Real Property Acquisition Act at 49 CFR part 24, and implementing regulations, apply to this program by establishing minimum standards for federally funded programs and projects that involve the acquisition of real property (real estate) or the displacement or relocation of persons from their homes, businesses, or farms.
 - p. The National Environmental Policy Act of 1969 (NEPA), the Council on Environmental Quality's NEPA implementing regulations, and applicable agency NEPA procedures apply to this program by establishing procedural requirements to ensure that Federal agencies consider the consequences of their proposed actions on the human environment and inform the public about their decision making for major Federal actions significantly affecting the quality of the human environment.
 - q. All applicable requirements of the Infrastructure Investment and Jobs Act ("IIJA") Pub. L. No 117-58 which includes the Build America Buy America Act (BABA), Public Law No 117-58 §§ 70901-52, and Implementing regulations, apply to this program.
 - r. US DOT Certification for Federal-Aid Contracts
 - s. Federal Highway Administration Contract Requirements
 - t. US DOT Certification of Eligibility
 - u. Drug Free Workplace
 - v. Disadvantaged Business Enterprises Policy Statement - This is a federally funded procurement; however, per 23 CFR § 680.118 the Disadvantaged Business Enterprise (DBE) Program does not apply to the RAISE Planning projects. The proposer is encouraged to utilize DBEs if subcontracting any work in any of the project phases and that information should be captured as part of our race neutral goal attainment.
 - w. Equal Employment Opportunity.

Damages for Breach of Contract:

In addition to any other legal or equitable remedy SWODA may be entitled to for a breach of this Contract, if SWODA terminates this Contract, in whole or in part, due to Contractor's breach of any provision of this Contract, Contractor shall be liable for actual and consequential damages to SWODA.