



## **PROJECT INFORMATION**

WTA is a Public Transportation Benefit Area (PTBA), defined by RCW 36.57A, providing fixed route and paratransit service throughout Whatcom County, Washington and to neighboring Skagit County. WTA has 262 employees, with most represented by Amalgamated Transit Union, Local 843. The current collective bargaining agreement is in effect from January 1, 2016 through December 31, 2018.

Whatcom Transportation Authority (WTA) is seeking an experienced firm to assist with community outreach and marketing for a Federally Funded Integrated Mobility Innovation “Mobility on Demand” (MOD) project in Lynden, Washington. Like many agencies that serve both urban areas and small cities, WTA finds the standard offerings of fixed route and paratransit service—which meet people’s needs extremely well in our densely populated areas—do not meet the needs of residents of small cities. The scope of the MOD project is to test whether an on-demand service could increase the effectiveness and usage of public transportation in a small city.

The MOD project will provide on-demand service to residents in the small city of Lynden, Washington. Using a mobile app, residents will be able to hail a ride to any destination within the City of Lynden, including WTA’s transit center located in City limits. WTA staff will purchase and operate the mobile scheduling app. Service will be provided by WTA drivers in WTA-owned wheelchair-accessible vans. The goal of this project is to improve access to—and the convenience of—public transportation within a small town. Though open to everyone, the MOD project specifically targets use by seniors, school-aged children, people with disabilities, and people with limited income.

The City of Lynden has a population of nearly 15,000 people. It covers 5.4 square miles. Approximately 23 percent of the population is over the age of 65. Of those, 13 percent are below the poverty level. Lynden has a small, vibrant downtown, numerous medical facilities, and two grocery stores. While the fixed route bus does serve a need of connecting people to the nearest larger town, the fixed route does not connect all points within the city.

WTA currently serves the City of Lynden with one fixed route bus. It runs on a 90-minute schedule. While WTA recognizes this level of frequency reduces convenience, the demographics and population density of Lynden do not warrant greater frequency. Even for those who can access WTA’s fixed route, service is limited. For those who live outside the fixed route service area, mobility options are extremely limited.

## **SCOPE OF WORK**

WTA is seeking a professional firm to help with the following aspects, and has budgeted \$30,000 - \$50,000 for this project:

- Meaningful community outreach to the target groups, to help in the final design of the service. Some questions for community members may include
  - a. What days of the week are most important to serve?



**Responses due October 29, 2020 no later than 1:00 PM**

- b. What should the geographic boundaries be? City limits, or a certain radius outside city limits?
- c. What will be common origins and destinations of riders?
- Since in-person meetings and community events are not possible, WTA is seeking professional help creating attractive, interactive, engaging surveys to help us get this information. Engagement surveys should be inventive and consider the differences in the four (4) target markets provided above, be accessible regardless of internet capabilities (either access or experience) and encourage responses.
- Meaningful community outreach to help increase buy-in and acceptance/excitement about the project. One idea is a naming campaign/contest, to help us come up with a name that's favorable to prospective riders and the community. Another is "brand ambassadors" within the community to help communicate the message.
- A targeted marketing plan, specific to the community of Lynden, focusing primarily on reaching parents, seniors, people with disabilities, and people with a limited income. Similarly, awareness of individuals access to and familiarity with internet is important.

This plan would include a schedule of activities (for example, hosting a virtual town hall or community meetings, submitting articles to school district newsletter, targeted mailers, etc.) as well as a list of deliverables (ads, social media posts, yard signs, bus boards, etc.) designed to promote the MOD project to the community.

- Creation and execution of all product branding (except the name, which WTA would like to create with the community). This includes colors, fonts, a distinct logo and a graphic identity. WTA's logo would also be incorporated into all pieces.
- Design and production of all promotional materials, including the vehicle graphics, ads, video, social media graphics, etc.

### **Performance Schedule**

- November 2020: Seek community input. Generate community enthusiasm through outreach.
- November 2020: Create marketing plan.
- December 2020: Finalize branding and develop promotional material.
- January through March 2021: Implement marketing plan.



**TIMELINE AND SCHEDULE**

| <b>Activity</b>                     | <b>Date - 2020</b>                   |
|-------------------------------------|--------------------------------------|
| <b>Procurement Request Released</b> | October 15                           |
| <b>Submissions Due</b>              | October 29 No Later Than 1:00 PM PST |
| <b>Final Selection</b>              | No later than November 6             |
| <b>Performance Start Date</b>       | November 9                           |

**MINIMUM PROPOSER QUALIFICATIONS**

At the time of submittal, a proposer must<sup>1</sup>:

- Have a State of Washington and all required local government business license(s) and endorsements<sup>2</sup>
- Be registered with SAM.gov and not be suspended or debarred
- Not be disqualified from proposing under RCW 39.06.010 or 39.12.065 (3)
- Demonstrate there are no outstanding and/or repetitive violations with Labor and Industries, Department of Revenue, or Employment Security.
- Possess all permits, registrations, and licenses as required by city, state, and Federal ordinances, rules, laws, and regulations. When requested by WTA, Proposer shall provide documents confirming that he/she/it has obtained any local business registrations or permits that may be required.

Proposers not meeting these minimum requirements will be rejected.

**PROPOSER’S HISTORY**

WTA will consider all the material submitted by the Proposer and other evidence it may obtain otherwise, to determine whether the Proposer is capable and has a history of successfully completing similar contracts, including but not limited to:

- Being skilled and regularly engaged in the type of work required.
- Having the experience, ability, sufficient capital, facilities, personnel and plant to complete the work properly and successfully it within the required time limit.
- Having performed satisfactorily other similar contracts including size, difficulty and rates of progress.

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<sup>1</sup> RCW 39.04.350

<sup>2</sup> A City of Bellingham endorsement will be required as a condition of proposal award to the highest scoring proposer.



**CONTACT**

All contact, including questions and clarifications will be directed to the contact listed below.

Magan Waltari, CPPB  
Procurement & Grants Coordinator/DBELO  
4011 Bakerview Spur  
Bellingham, WA 98226  
(360) 788-9332  
procurement@ridewta.com

**PROPOSAL SUBMISSION AND EVALUATION**

Proposals may be submitted via email or on a dedicated USB flash drive. Hard copies are not accepted. Proposal should be submitted to Magan Waltari at the email or address above.

Proposals submitted by mail or express carriers (i.e. UPS, FedEx, DHL) must arrive by the due date and time. **WTA bears no responsibility for proposals that are sent, but not received due to attachment limits, spam filter rejection, or the proposers use of an incorrect email or physical address.**

Failure to include any of the requested information may render the proposal non-responsive.

Submissions will be evaluated as follows and points will be rounded

1. The Procurement & Grants Coordinator will review proposals against the following factors. Proposals that do not receive 3 “Pass” scores will not be reviewed further. Pricing will be scored using the following normalizing formula

$(\text{Lowest Overall Proposed Price} \div \text{Price Being Evaluated}) \times \text{Total Points Possible} = \text{Score}$ .

| <b>Factor</b>   | <b>Score</b> |
|---|--------------|
| Conformity with Minimum Proposer Qualifications (3.C) | Pass/Fail    |
| Complete Package Submission (3.E)                     | Pass/Fail    |
| All Exhibits Completed (Part 8)                       | Pass/Fail    |
| Price   | 5            |



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- WTA will then review Proposals receiving 3 “Pass” scores against the following Evaluation Factors, with the most important factor listed first.

| <b>Evaluation Factor</b>                   | <b>Score</b> |
|--|--------------|
| Description of Qualifications              | 5            |
| Response to Scope of Service               | 5            |
| Design Creativity in Submitted Samples     | 5            |
| Sample Relevance to WTA Scope              | 5            |
| References & Past Performance <sup>3</sup> | 5            |
| Clarity of Response                        | 5            |
| <b>Total Possible</b>                      | <b>40</b>    |

Scores are in whole numbers only or rounded down. (e.g. 4.5 will round to 4), then averaged based on how many evaluators participate. The total possible points of all scores will be carried out two (2) decimal points. The highest scoring Proposer will be selected. Nothing in this request obligates the WTA to award a contract to the lowest cost Proposer, or any Proposer.

Proposals will include the following in the below order:

### **1. Description of Qualifications:**

Illustrate your experience marketing special programs to small communities in rural areas. Provide specific examples of successes with outreach and engagement with targeted groups of individuals with a variety of unique characteristics.

### **2. Response to Scope of Services Must Include:**

- Demonstrated understanding of WTA’s needs and scope of service
- Description of available services and qualifications
- Requirements of WTA

### **3. Questions**

Proposers will also submit answers to the following questions

- Describe experience with creating interactive surveys, designed to be attractive and easy to use. Provide links to recent examples.
- Describe a project where community outreach and marketing had to reach a specific targeted audience. What community outreach and marketing activities were most useful in these instances?

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<sup>3</sup> 40 USC 1103



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3. Describe experience providing outreach to a small town (population under 15,000), or other relevant small market. What community outreach and marketing activities were most useful in these instances?
4. Share recent samples of product branding and marketing materials. Samples should demonstrate an understanding of the Scope of Work above.

#### **4. Price Proposal:**

Please include the fees for all services described in the Scope of Services. Price will be evaluated on the total lump sum cost of the project as proposed.

#### **5. References:**

References should be with agencies or companies that have had projects similar to WTA's requested Scope of work. They should also reflect the firms ability to meet WTA's requested Scope of Work in a collaborative and approachable fashion. All references must have current names, titles and phone numbers of individuals familiar with the work provided. WTA will not review references with incorrect contact information.

Proposers are advised that if references do not respond and WTA is unable to review references, a score of 0 is provided. It is recommended that proposers coordinate with their references to ensure WTA receives a response. Verifiable letters of reference are also acceptable.

#### **FEDERAL JURISDICTION**

This engagement is funded using Federal Transportation Administration (FTA) grant funds. Proposers are advised that the terms and conditions attached herein as Appendix B will govern contract performance. The awarded contractor will be required to meet all reporting requirements as outlined in the Terms and Conditions.

Where FTA terms are silent, WTA's General Contract Terms & Conditions (Appendix A) will govern.

#### **CONTRACT TERM AND INVOICE PAYMENTS**

1. Contract Term: The initial contract term will be 1 years. WTA may renew the contract for one (1) additional year.
2. Payment: Payment will be based at Net thirty (30) day terms. WTA is open to negotiating different payment terms (i.e. 3% Net 15, etc.). WTA reserves the right to refuse payment on invoices for work that is performed without the proper endorsement and written consent.

#### **SUBCONTRACTORS**



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Contractor will make a good faith effort to utilize DBE subcontractors whenever possible (See Federal Terms & Conditions). WTA will require reports on a Contractor's good faith effort as well as sub-contract spend, where applicable.

All subcontractors must be pre-approved by WTA before they begin work. WTA reserves the right to investigate subcontractor responsibility prior to confirming award, if subcontractors are known. WTA will not approve change orders to the proposal or final contract price for replacing rejected subcontractors.

Prime contractors will provide a copy of the sub-contract or purchase order to WTA. Any sub-contract will contain the same language as required in Appendix A.

## **INSURANCE**

Contractor and subcontractors will not begin Work until proof of insurance has been received and approved by the WTA. Insurers must be licensed to conduct business in the State of Washington (or issued as a surplus line by a Washington Surplus lines broker) and approved by the State Insurance Commissioner<sup>4</sup>. Insurers must have a minimum rating of A- and a financial rating of Class VII or higher in the most recently published edition of the A.M. Best's Key Rating Guide. Subcontractors must furnish the same insurance requirements listed below prior to starting work.

Approval of the insurance by WTA will not relieve or decrease the liability of the Contractor for any damages arising from Contractor's or its subcontractors' performance of the work. Contractor's failure to fully comply with insurance requirements shall be considered a material breach and cause for immediate contract. Contractor shall bear all damage costs sustained for failure to maintain any of the required insurance or to provide notification that it cannot.

Coverage will include claims for damages arising from Contractor's performance for:

- Bodily injury/death
- Personal injury
- Property Damage, including Premise and Operations, Fire damage and medical expense
- Independent Contractors coverage
- Protective Liability
- Completed Operations and Products.

The Contractor and subcontractors must procure the following minimum insurance:

1. Commercial General Liability in the amount of \$1,000,000 per occurrence and \$2,000,000 per project aggregate.
2. Automobile Liability Insurance in the amount of \$1,000,000 combined single limit.
3. Umbrella or Excess Liability in the amount of \$1,000,000 per occurrence.
4. Professional Liability in the amount of \$1,000,000 per occurrence.

Coverage must be maintained through the life of the Contract plus one (1) year.

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<sup>4</sup> RCW 48



Contractor and subcontractors must furnish the following endorsements separate of the Certificate of Liability:

- Additional Insured Endorsement naming “WTA Agents & Employee’s” for Ongoing Operations. Endorsement should be on Accord© form CG20100704 or equivalent.
- Additional Insured Endorsement naming “WTA Agents & Employee’s” for Completed Operations. Endorsement should be on Accord© form CG20370704 or equivalent.
- Waiver of Subrogation naming “WTA Agents & Employee’s”. Endorsement should be on Accord© form CG24041093 or equivalent.
- Cancellation Endorsement providing thirty (30) days advance written notice to be received by WTA.

Contractor and subcontractors must maintain during the life of this contract Worker's Compensation Insurance. If the Contractor is not eligible for Worker's Compensation Insurance, it will indemnify and hold WTA harmless for any claims resulting from Contractor's actions.

These insurance requirements do not limit the Contractor’s liability for damages resulting from performance.

### **LIMITATIONS OF LIABILITY**

WTA is unable to agree to any limitation of liability in the event of a claim or issued judgment through the performance of a contract. This is considered a gift of public funds and is unenforceable by the Washington State Constitution<sup>5</sup>.

### **PUBLIC DISCLOSURE LAW**

WTA complies with RCW Chapter 42.56. All proposals and contract documents will be disclosed if a Public Disclosure Request (PDR) is submitted, unless a proper exception applies. It is Proposers responsibility to be familiar with RCW Chapter 42.56 and what WTA’s confidentiality limitations are.

WTA will not execute non-disclosure agreements.

### **Public Records Application to Documents of Vendor**

As a public contract, all records prepared, generated or used by a successful vendor or its agents, employees and subcontractors relating to the contract and associated work will be subject to being a “Public Record” under RCW Chapter 42.56. Proposer, if selected, shall maintain and retain all such records in a manner that is accessible and WTA shall have the right to review and inspect such records upon request, for a term of three (3) years following completion of the contract work. All records subject to a public disclosure request will be provided to a requester. WTA may only refrain from disclosing any record based upon an exemption that is applicable to WTA and will not refrain from disclosing any record under an exemption that may be personal to the Proposer. Proposer will

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<sup>5</sup> Washington State Constitution, Article VIII, Section 7





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need to seek judicial approval to prevent such disclosure, at its expense. Proposer, if selected, shall insert this provision in all contracts with subcontractors or agents providing services relating to the contract.




**PROPOSER CHECK LIST and FORMS**

By submitting a Proposal, Proposers agree to be bound by and adhere to all legal requirements and contract terms and conditions contained in this solicitation document.





WTA will not make any concessions for Proposers who are not completely familiar with the scope or contract requirements.

The following information, forms and documents contained in this solicitation shall be completed and submitted as the proposal document. Proposals not adhering to the provided directions may be disqualified as non-responsive.




- Proposal Confirmation and Cover Sheet
- Contractor Information & References
- Conflict of Interest Statement
- Debarment Certification
- Submission Response
- Price Sheet

The below exhibits and appendices are embedded into the RFP as indicated with this symbol: 

Proposers are responsible for ensuring they can access them.

|  |   |
|--|---|
| <b>Proposal Confirmation and Cover Sheet</b>       |  |
| <b>Proposer Information &amp; Reference Format</b> |  |
| <b>Conflict of Interest Certification</b>          |  |
| <b>Debarment</b>                                   |  |
| <b>Price</b>                                       |   |

The terms and conditions provided below will govern the resulting contract.

|  |   |
|--|---|
| <b>General Contract Terms &amp; Conditions</b> |  |
| <b>Federal Contract Terms &amp; Conditions</b> |  |
| <b>Sample Contract</b>                         |  |