SPOKANE TRANSIT AUTHORITY
1230 WEST BOONE AVENUE
SPOKANE, WASHINGTON 99201

REQUEST FOR PROPOSALS
2022-10743

RESEARCH & SURVEY SERVICES

ISSUE DATE: JANUARY 9, 2023
PROPOSAL DUE DATE: FEBRUARY 3, 2023
4:00 PM PACIFIC TIME

RFP 2022-10743

RESEARCH & SURVEY SERVICES

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PART I
INSTRUCTIONS TO PROPOSERS

1.0 INSTRUCTIONS TO PROPOSERS

1.1 Introduction

Spokane Transit Authority (STA), located at 1230 West Boone Avenue, Spokane, Washington, 99201, is requesting Proposals from qualified Proposers to furnish research and survey services over a three (3) -year period.

The Proposer may supplement its Proposal with Subcontractors, with the understanding the Proposer is responsible for all Work.

Please read this entire RFP package before submitting your Proposal. Careful attention must be paid to all requested items contained in this RFP.

This RFP does not commit STA to enter into any Contract; to pay any costs incurred in the preparation of a Proposal in response to this RFP or in subsequent negotiations; or to procure or contract for the Work. STA expects to negotiate a Contract with the Proposer it deems most advantageous to the agency.

1.2 Defined Terms

The following defined terms are used throughout this RFP. In the event of a conflict between the definition herein and the definition of the same term in a separate part of this RFP, the definition in the separate part of this RFP shall prevail for that part only.

Alternate Proposal (or Alternate or Option) is the amount stated on the Price Proposal Form to be added or deducted from the amount of the Base Price if the corresponding change in project scope or materials or methods described in the RFP Documents is accepted.

Amendment is a written or graphic instrument, approved and issued by STA prior to the Proposal Due Date, which amends, modifies or interprets the RFP by additions, deletions, clarifications or corrections.

Base Price is the sum stated on the Price Proposal Form for which the Proposer offers to perform the Work.

Business Day means Monday through Friday, except public holidays, from 8:00 AM to 5:00 PM, Pacific Time.

Contract refers to an agreement executed between STA and Contractor for the provision of Work.

Contractor means the responsible Proposer awarded a Contract resulting from this RFP.

Day means calendar day unless otherwise noted.

Non-responsive Proposal is any Proposal which (1) fails to conform in any respect to the requirements of the RFP; (2) imposes conditions which would modify requirements of the RFP; or (3) limits a Proposer's liability to STA to give the Proposer an advantage over other Proposers, as determined by STA.

No Proposal Form: Attachment C.

Price Proposal Form: Attachment D.

Project Site means STA's facilities located at multiple sites in the Spokane, WA region.

Proposal is the submission of a complete and properly executed Price Proposal Form, Proposal Response Form, all Proposer Certifications and representations required to comply with the RFP, and any additional documentation that may be required by the RFP.

Proposal Response Form: Attachment A.

Proposer is an individual or entity who submits a Proposal for a Contract with STA for the performance of Work.

Proposer Certifications are the forms and documents identified in Part III of this RFP which the Proposer is required to sign and include in its Proposal.

Proposal Due Date is the date and time at which Proposals are due as specified in Section 1.5 of the Instructions to Proposers in this RFP. Proposals received after this date and time will be considered nonresponsive and returned to the Proposer.

Request for Approved Equals Form: Attachment B.

Request for Proposal (RFP) Documents include, but are not limited to, the Advertisement for Proposals, Instructions to Proposers, Price Proposal Form, Proposal Response Form, all attachments and exhibits related to this RFP, Technical Requirements, all other documents proposed or required for the performance of Work, and any or all Amendments hereto issued prior to the Proposal Due Date and/or the Best and Final Offer due date.

Sample Agreement means the sample agreement attached hereto and incorporated herein as Exhibit A.

STA means the Spokane Transit Authority.

Subcontractor is an individual or entity who submits a proposal to a Proposer for materials and/or labor for a portion of the Work.

Technical Requirements collectively refers to all drawings, specifications, technical requirements, special conditions and the Scope of Work attached hereto.

Work means the scope of goods and services in the Scope of Work to be provided by the Contractor under a Contract.

1.3 Proposer Communications with STA

STA is committed to providing all prospective Proposers with accurate and consistent information in order to ensure that no Proposer obtains an undue competitive advantage. To this end, from the date this RFP is released through award of a Contract, all communications, questions and inquiries concerning this RFP shall be addressed to:

Jennifer Anderson
Procurement Coordinator
Spokane Transit Authority
1230 West Boone Avenue
Spokane, WA 99201
(509) 325-6024
janderson@spokanetransit.com

STA reserves the right to disqualify any Proposer who contacts a STA officer, director, employee, agent, representative or committee or Board member concerning this RFP other than in accordance with this Section.

1.4 Pre-Proposal Conference

A pre-proposal conference will be held on January 17, 2023, beginning at 8:15 AM Pacific Time. To participate:

Microsoft Teams meeting
Join on your computer, mobile app or room device
Click here to join the meeting
Meeting ID: 238 687 659 677
Passcode: 6xwXNG
Download Teams | Join on the web
Or call in (audio only)
+1 509-824-1714,,805489059# United States, Spokane
Phone Conference ID: 805 489 059#
Find a local number | Reset PIN
Learn More | Meeting options

Questions and/or clarifications about the RFP may be addressed during this conference. Questions and/or clarifications may be submitted in advance in accordance with Section 1.3.

Any prospective Proposers in receipt of this RFP will be provided with any changes or clarifications to the RFP by written Amendment in accordance with Section 1.9.

1.5 Proposal Due Date and Proposal Submission

Proposals will be accepted until 4:00 PM, Pacific Time, February 3, 2023, in accordance with the specifications and conditions stated in the RFP. Proposals must be labeled "RFP 2022-10743 Research & Survey Services" and submitted via Drop Box at the following link:

https://www.dropbox.com/request/tf0gO7raRuQho0TNaCuS

All Proposals shall be effective for ninety (90) Days from the Proposal Due Date or Best and Final Offer ("BAFO") date (if applicable), whichever is later. Late submittals shall be deemed non-responsive and returned to the Proposer. The cost of Proposal preparation will be completely borne by the Proposer. STA reserves the right to request an original of a Proposal with original signatures, in its sole discretion.

Except as otherwise provided for herein, Proposals which are incomplete, or which are conditioned in any way or contain erasures, alterations or items not requested in the RFP, or which are not in conformance with the RFP or applicable laws, rules and regulations, may be rejected as non-responsive.

1.6 Procurement Schedule and Deadlines

Below is the proposed procurement timeline for this RFP. Unexpected events may cause this timeline to change. STA reserves the right to revise the procurement timeline at any time and for any reason.

DATE	EVENT
January 9, 2023	RFP Advertised and Issued
January 17, 2023, 8:15 AM Pacific Time	Pre-Proposal Conference
January 23, 2023	Deadline to Submit questions, Requests for Clarification, or Approved Equals
February 3, 2023, 4:00 PM Pacific Time	Proposal Due Date
February 6-10, 2023	Evaluation of Proposals
March 1, 2023	Contract Execution

1.7 Proposer Registration & Licensing

A. At the time of Proposal submittal, as a minimum requirement for a Proposal to be deemed responsive, Proposers must have a valid State of Washington Universal Business Identifier (UBI) number and be properly and completely registered with the Washington Secretary of State, Department of Revenue, and where applicable by law, the Department of Labor and Industries. STA encourages Proposers to review the following resources when determining applicable registration requirements:

- Business Registration
- Out-of-State Businesses
- Business Licensing FAQ

B. In addition to the requirements of subsection A of this Section 1.7, following award of Contract, but prior to Contract execution, the Proposer shall provide evidence of necessary local business licenses, if applicable, within the local jurisdictions where the performance of Work shall occur.

1.8 Request for Approved Equals, Changes or Clarifications

Requests for an approved equal, changes or clarifications to the Work, Technical Requirements or RFP Documents shall be submitted on the Request for Approved Equals Form. Requests for changes to the Sample Agreement shall only be submitted as redlines in Word format using the Track Changes tool. STA will provide a copy of the Sample Agreement with track changes enabled for such requirement. Requests identified in this Section shall be submitted electronically in accordance with Section 1.3.

No request for an approved equal, changes or clarifications to the Work, Technical Requirements, RFP Documents or Sample Agreement shall be considered unless a written request in the manner and form prescribed above is received by STA no later than the date prescribed in Section 1.6.

Approved substitutions, changes or clarifications will be set forth in a written Amendment. Proposers shall not rely upon approvals made in any other manner. No substitutions shall be considered after the Proposals are received without prior written approval by STA.

1.9 Changes to RFP Documents

Any changes to the Work, Technical Requirements, Sample Agreement or RFP Documents will be made by written Amendment issued by STA. All prospective Proposers receiving the initial RFP package will be notified by email of these changes. Proposers shall acknowledge their receipt of all Amendment(s) in Section 1.B of the Proposal Response Form.

1.10 Contract

STA's Sample Agreement will be executed with the successful Proposer. It is unnecessary for Proposers to sign and return the Sample Agreement with their Proposal; however, **Proposers should review the terms & conditions therein and submit any proposed language changes in accordance with Section 1.8 of this RFP.**

Upon receipt of a Contract, the Contractor shall have five (5) Business Days to execute such Contract and return to STA, inclusive of all requisite documentation and/or Proposer Certifications. If the Contractor fails to execute the Contract, furnish bonds (where applicable), securities or proof of insurance, or provide other required documentation within this time period, STA will be entitled to consider all rights arising out of STA's acceptance of the Proposal. STA will be entitled to such rights and additional remedies as exist at law.

1.11 Insurance

Requirements as stated in the Sample Agreement shall be met by the Proposer.

1.12 Invoicing & Payment

Contractor invoicing and payment shall be in accordance with the Contract.

1.13 Proposer Certifications

STA is required to obtain certain Proposer Certifications in all of its solicitations. The Proposer Certifications must be completed in full, properly executed by the Proposer, and returned with the Proposal on or before the Proposal Due Date. A Proposal that does not include the properly completed and executed Proposer Certifications may be considered non-responsive and removed from further consideration, in the sole discretion of STA. Following award of Contract, the successful Proposer must obtain signed Proposer Certifications from each Subcontractor, of any tier, providing services in accordance with the Proposer's Proposal and provide these certifications to STA prior to execution of the Contract.

1.14 No Proposal Form

To assist STA with future procurements, prospective Proposers choosing not to submit a Proposal are requested to complete and return the enclosed No Proposal Form.

1.15 Complete System

It is the intention of the Technical Requirements, RFP Documents and other documentation attached hereto or contained herein to furnish all information, specifications and detail necessary for the Contractor to deliver the Work. Any items omitted from the Technical Requirements or RFP Documents that are clearly necessary to perform and deliver the Work shall be considered a part of the Technical Requirements or RFP Documents, although not directly specified or called for. Proposers shall promptly bring any discrepancies, errors, omissions, inconsistencies or ambiguities to the attention of STA after examining the Technical Requirements and RFP Documents in order for STA to consider the issuance of an Amendment.

1.16 Option to Supply Materials, Equipment and Licenses

STA may, at its option, supply hardware, software, licenses, warranties, infrastructure or materials outside of this RFP in accordance with design specifications provided by the Contractor. In the event that STA supplies any such items, they shall be delivered in working order and in a timely fashion to the Contractor at a location and date to be determined in advance and agreed in writing. The Contractor shall not be

reimbursed for the cost of items procured by STA outside of the Contract. In the event Contractor is required to utilize items provided by STA, Contractor shall have no responsibility for compliance with design specifications, warranty or delays arising out of or related to STA-provided materials.

1.17 Other Contractors Advisory

The Contractor is advised that coordination may be required through STA with other contractors supplying or conducting work on related projects. The Contractor is also advised that there may be other contractors working on-site at STA projects or properties. The Contractor shall reasonably coordinate the Work with other contractors working in the vicinity.

1.18 Equal Employment Opportunity

STA is an Equal Employment Opportunity ("EEO") organization, which does not discriminate against any prospective Proposer on the basis of race, color, creed, national origin, sex, sexual orientation, gender identity or presence of any sensory, mental or physical disability in the consideration of contract award. The Proposer awarded a Contract will be required to comply with all EEO federal, state and local laws and regulations.

1.19 Project Records and Cost Pricing Data

Comprehensive records and documentation relating to this RFP shall be kept by the Contractor. The records shall include, but are not limited to, contract documents, plans, drawings, specifications, addenda, shop drawings and submittals, change orders, Amendments, modifications, manufacturer recall notices, field test results and records, and as-built drawings and records.

The Contractor shall keep and maintain reasonably complete and reliably detailed records of costs incurred in performing the Contract in accordance with applicable Federal Transit Administration requirements.

1.20 Protest Procedures

STA maintains a set of Proposer protest procedures. If any Proposer desires this information, it may be obtained by contacting STA in accordance with Section 1.3.

1.21 Reservations of STA

STA reserves the right to reject any or all Proposals or a portion of a Proposal; to waive any informalities or irregularities in the Proposal submission process; to supplement, amend or otherwise modify this RFP; to cancel this RFP with or without the substitution of another RFP; to extend the Proposal Due Date; to request additional information and data from any or all Proposers; to reissue the RFP; to negotiate further with those Proposers within the competitive range; to increase or decrease the Scope of Work; to negotiate changes in the Scope of Work prior to award of Contract; and to award a Contract based not necessarily upon the lowest proposed prices, but in the best overall interests of STA. Please note this RFP does not constitute an offer, but rather a request from qualified Proposers.

2.0 PROPOSAL FORMAT AND CONTENTS

2.1 Proposal Format

Proposals shall be formatted to 8½" x 11", and shall be limited to fifty (50) pages, including all required attachments. Proposals shall use English units of measure, and all text shall be in the English language.

Proposals shall not include any unnecessary, generic or elaborate promotional material. Proposals shall be submitted per instructions in Section 1.5.

2.2 Changes/Alterations to Proposal

Proposers may change or withdraw their Proposal at any time prior to the Proposal Due Date; however, no oral modifications will be allowed. Only letters or other formal written requests for modifications or corrections of a previously submitted Proposal that is addressed in the same manner as the Proposal, and received by STA prior to the Proposal Due Date, will be accepted. The Proposal, when opened, will then be corrected in accordance with such written request(s), provided the written request is plainly marked "Modification of Proposal".

2.3 Proposal Structure

Proposals shall be presented clearly and concisely, and shall reflect the Proposer's understanding of the RFP objectives and convey a sound technical approach and management plan to deliver the Work. Proposals shall convey the Proposer's capabilities and qualifications to competently and cost-effectively complete the Work in a timely manner.

Proposal presentation shall be construed as evidence of the Proposer's ability to develop and convey technical information in a clear and concise manner.

For ease of comparison and validation of completeness of Proposals, Proposers must adhere to the organizational structure and section headings outlined below. Proposals that deviate from this organizational structure or are missing key information elements may be considered non-responsive and excluded from further review and/or evaluation, in STA's sole discretion.

Proposals shall contain at a minimum the following information:

- Proposal Letter
- TAB A Introduction and Qualifications of the Proposer
- TAB B Project Organization and Staffing Plan
- TAB C Management Plan
- TAB D Proposal Response Form
- TAB E Price Proposal Form

2.3.1 PROPOSAL LETTER

Proposers shall provide a cover letter with introductory information, such as point of contact, address, email and phone number. This letter should be addressed to the contact specified in Section 1.3, reference the RFP by name and number, provide a concise summary of the Proposer's organization by firm and responsibility, identify the Proposer's Project Manager and his/her relevant experience, and generally introduce STA to the capabilities of the Proposer. The cover letter shall not exceed two (2) pages in length.

2.3.2 TAB A – INTRODUCTION AND QUALIFICATIONS OF THE PROPOSER

Introduction. Provide an introduction of the Proposer, and/or an introduction of all partner firms, Subcontractors or subconsultants who may be involved in the Proposal.

1) Describe primary business experience of the Proposer, including length of time in business, ownership, the location of the corporate and satellite office(s), and other information Proposer might deem pertinent and introductory in nature.

2) State whether the Proposer has any pending litigation, and whether the Proposer has had any litigation in the last five (5) years, including the outcome of such litigation.

Qualifications of the Proposer. The Proposer shall describe its history, experience and past projects and performance which are similar in nature, scope and complexity to that required by this RFP. The roles and responsibilities of each member of the Proposer's team (Subcontractors, consultants and suppliers) shall also be described.

1) Project Experience. Proposal shall provide a list of similar project experience that have been completed within the previous five (5) years. Describe locations, nature of the work, project cost, status (completed, in development, in testing, etc.) and month and year of final acceptance. Submit supporting documentation (photographs, descriptions, cost data and example survey reports) on a minimum of three (3) projects of similar size and complexity. Include the contract amount and contract start and end dates. The projects listed should provide evidence that the Proposer is qualified to successfully perform the Work. **Proposers may opt to provide additional supplemental information in this section as relevant to this RFP.**

2) References. From the project qualifications and/or ongoing installations listed under the section above, the Proposer shall provide a minimum of five (5) references. For each reference, provide the agency name, address, contact person, telephone number and email address. STA reserves the right to contact references provided by the Proposer and solicit additional references to verify information and investigate past performance.

3) Financial Capacity. The Proposer shall provide information demonstrating that it has the necessary financial resources to satisfactorily complete the Work required under this RFP. The Proposal shall include copies of financial information in order of preference: (1) audited financial statements; (2) balance sheets; (3) tax returns; (4) bank references, or similar information. In the case where the Proposer is a subsidiary organization, the Proposer should provide the financial information for its parent organization as well. Subsidiary statements can be provided to show the relationship to the parent. Electronic copies of financial statements are acceptable.

4) Required Attachments. The Proposer shall submit all applicable attachments as part of their Proposal.

2.3.3 TAB B – PROJECT ORGANIZATION AND STAFFING PLAN

Key Personnel. At a minimum, Proposers shall clearly identify and describe the qualifications of the "Key Personnel" it will assign to the Work, including years of experience, years in industry and years with the Proposer. If awarded a Contract, the Proposer may not substitute Key Personnel at any time without prior written consent by STA.

Team Organization. Describe the Proposer's staffing and organizational plan, including relationships, roles and distribution of responsibilities among Key Personnel, staff, Subcontractors and suppliers.

Qualifications of Key Personnel. Describe the direct qualifications, experience and training of Key Personnel. This discussion should explicitly cross-reference the involvement and specific roles of the Key Personnel in completed and ongoing projects described in the projects cited in Tab A.

Organizational Chart. Include an organizational chart that identifies Key Personnel and the project team, and how the Work will be staffed and completed.

Availability and Location of Key Personnel. Indicate the primary work location(s) and percentage time commitment of the Key Personnel for the Work.

Resumes. Resumes shall be submitted for Key Personnel. Resumes must be complete and concise, including, at a minimum, education, training, degrees and certificates earned. Resumes should indicate experience directly relevant to the Work. Resumes shall be limited to two (2) pages per individual.

2.3.4 TAB C – MANAGEMENT PLAN

Management Plan. Discuss the Proposer's management approach to ensure adequate technical and administrative oversight over the Work, and to manage the schedule and budget. Discuss proposed Quality Control ("QC") and/or Quality Assurance ("QA") measures & procedures and any certifications pertaining thereto. Include approach to coordination with, and any expectations of, STA.

Concurrent Contracts. Provide a list of present and anticipated future contracts which may run concurrent with the Work. Where applicable, include in the Work Project Schedule such contracts.

2.3.5 TAB D – PROPOSAL RESPONSE FORM

2.3.6 TAB E – PRICE PROPOSAL FORM

Proposal pricing shall be presented using the Price Proposal Form. Each page of the Price Proposal Form shall be completed in full and signed by personnel of the Proposer authorized to contractually bind the Proposer. Proposers may provide additional supporting cost breakdown information as separate sheets; however in case of any discrepancies, information on the Price Proposal Form shall prevail. Travel expenses, where applicable, shall be identified as required for completion of the Work. All prices shall include all freight costs to STA and shall be FOB Destination.

3.0 PROPOSAL EVALUATION

An evaluation committee will privately evaluate all responsive Proposals based upon the evaluation criteria, and their respective weighted importance, specified in Section 3.1, Evaluation Criteria.

The criteria provided in Section 3.1 allows STA to analyze Proposals on an equal basis and affords all Proposers the opportunity to know the basis upon which their Proposals will be evaluated. Award of Contract will be made to the Proposer whose Proposal or Best and Final Offer (where applicable) is the most advantageous to STA, cost and other factors considered, after evaluation in accordance with the criteria set forth below. STA reserves the right to accept other than the lowest cost Proposal, reject any and all Proposals, or to negotiate separately with any source whatsoever in any manner necessary to serve the best interest of STA.

3.1 Evaluation Criteria

EVALUATION CRITERIA	POINTS
Quality & Accuracy of Research	30 Points
Experience & Methodology in Data Gathering	30 Points
Qualifications of Personnel	15 Points
References	10 Points
Price Proposal	15 Points
TOTAL POSSIBLE	**100 Points**

The following items will be taken into consideration by STA during evaluation of Proposals:

Quality & Accuracy of Research

- Provides examples of previous reports and executive summaries.
- Explains how data is handled/data entered for accuracy.
- Explains how data is compiled and interpreted.

Experience & Methodology in Data Gathering

- Provides representative examples of past and present experience and success in this field.
- Demonstrates knowledge of best practices in sampling methodology.
- Demonstrates knowledge of transit agency operations and/or experience in conducting surveys for transit agencies.

Qualifications of Personnel

- Provides evidence staff assigned have three (3) years' experience in data collection methodology proposed.
- Provides evidence staff assigned have three (3) years' experience in data analysis of survey data.
- Demonstrates excellent customer service.

References

- Provides five (5) references.
- Provides references demonstrating the ability to comply with customer's needs and specifications.

Price Proposal Score Calculation

Proposals deemed non-responsive shall not be considered for price scoring. In determining the competitive range, the "Base Price Score" shall be calculated using the following formula:

$$\text{Base Price Score} = \frac{\text{Lowest Proposed Base Price}}{\text{Proposed Base Price}} \text{ X 15 Points}$$

BAFO Price – Fifteen (15) Points: In the BAFO round, if required, the Base Price Score shall be determined for the remaining Proposers using the same formula above.

3.2 Single Proposal Response

In the event a single responsive Proposal is received, a cost or price analysis may be performed to determine reasonableness of the Proposal. The Proposer shall cooperate in providing relevant information required by STA to complete such cost or price analysis.

3.3 Shortlisted Proposers

STA reserves the right to determine a shortlist of Proposers in the competitive range in accordance with the evaluation criteria set forth above ("Shortlisted Proposers").

3.4 Best and Final Offer

After determination of the Shortlisted Proposers, STA shall determine whether acceptance of the most favorable initial Proposal(s) without Proposer discussion is appropriate, or whether discussions and/or negotiations should be conducted with one or more Shortlisted Proposers.

STA reserves the right to make minor related changes to the RFP during BAFO negotiations. All Shortlisted Proposers shall be notified of any changes in order to prepare their BAFO.

If STA elects to enter into discussions with one or more Proposers, the Proposer(s) may be requested to submit a BAFO at the conclusion of discussions and/or negotiations. Any changes to the Proposer's initial Proposal, including any issues addressed in discussions, must be submitted in writing in a BAFO in order

to be considered. Following an independent and final evaluation utilizing the evaluation criteria in Section 3.1, the evaluation committee will make a recommendation for award of Contract. Scores from the first phase of the evaluation have no bearing on the final BAFO evaluation, and the recommendation for award will be based solely on the scores from the BAFO evaluation.

PART II
SCOPE OF WORK

Research & Survey Services Scope of Work

The awarded contractor will be responsible for conducting multiple annual surveys over a three-year period capturing the survey results in a database; providing database survey results in tables, charts, and other graphic visuals; and preparing a summary report for each survey with detailed observations (verbatim), and a narrative Executive Summary report. Survey results must be evaluated and compared to past available survey results, with detailed observations made of year-to-year comparison. The survey results must be based on standard practices methodology that ensures an outcome of reliable defensible data.

There are five survey instruments scheduled for Calendar Year 2023. Each one is listed below with a concise explanation of methodology, sample size, and approximate number of questions. When possible, every effort should be made to continue with previous STA measurement methodology and reporting practices for consistent year-to-year comparisons.

To ensure consistency of information, the methodology and questions asked in each survey should remain virtually the same from year to year, with the possible exception of up to 10 additional questions to assess current conditions/situations.

The contractor may elect to implement a variety of survey methods to gather feedback including paper, electronic tablets, online digital surveys, and phone surveys.

The awarded contractor shall conduct the following surveys:

Survey #1: STA Employee Survey

The purpose of this annual survey is to gather feedback from STA employees to evaluate their satisfaction with employment at STA, their ratings of STA's performance, and employees' views of the general public's perceptions of the services provided by STA. This survey will be facilitated by the contractor and conducted at an STA facility at one of four quarterly All Employee meetings that are held throughout multiple shifts in one day. There are currently 635 employees (subject to change) with an average attendance rate of 50%.

The current survey instrument has approximately 40 questions. As part of the services provided, the contractor agrees to revise and restructure the current existing survey instrument, as needed, and as agreed upon by STA, to more effectively gather pertinent information.

Survey #2: Community Perception

The purpose of this annual research is to evaluate and track public attitude and perceptions of STA. The survey is approximately 50 questions in length. Live telephone survey methodology has been the primary method used to reach 400 adult residents of STA's Public Transportation Benefit Area (PTBA).

Survey #3: Fixed Route Passenger Survey

The purpose of this annual fixed route passenger survey is to explore ridership behavior of passengers, determine leading reasons for using the bus, evaluate STA service and performance, and update the demographic profile of riders. STA prefers surveys to be administered online or digitally. Target quotas should be developed based on actual ridership to ensure a cross-section of riders completing the survey.

Survey #4: Paratransit Passenger Survey

The purpose of this annual Paratransit passenger survey is to explore ridership behavior of Paratransit passengers, determine leading reasons for using Paratransit, evaluate STA service and performance, and update the demographic profile of riders. Target quotas should be developed based on actual ridership to ensure a cross-section of riders completing the survey.

We prefer surveys to be conducted via phone to Paratransit customers or their caregivers. As part of services provided, the contractor agrees to revise and restructure the current existing survey instrument as needed and as agreed upon by STA, to more effectively gather pertinent information.

Survey #5: Rideshare Market Research Survey

The purpose of this survey is to explore customer and general public opinion of Rideshare service (formally known as Vanpool), the level of awareness of the service, and gather insights on specific elements of the service.

Additionally, this survey will probe interest in potential program changes that may result in increased participation and ridership. The target audience is current customers and the public. This survey will only be conducted one-time during the contract period and traditionally has been conducted via phone.

Executive Summary Report by Survey

The Executive Summary Report for each survey shall contain a narrative that lists the purpose of the survey, the methodology employed, summary findings of each question on the survey, along with graphical representation of each question with comparison to the previous surveys. Any findings of significance should also be highlighted.

PART III
ATTACHMENTS

ATTACHMENT A

PROPOSAL RESPONSE FORM

Proposer Name: _____

The Proposal shall constitute an offer to STA as outlined herein and in the Price Proposal Form. No Proposer may withdraw its Proposal following the Proposal Due Date, except as allowed by the RFP.

1. EXAMINATION OF DOCUMENTS & CONDITIONS

   A. Having carefully examined all RFP Documents and local conditions affecting the Work as determined by the Proposer's own examination, the undersigned proposes to perform all Work in accordance with the RFP Documents for compensation to be computed from prices submitted on the Price Proposal Form.

   B. Receipt of the following Addenda is hereby acknowledged:

   Addendum No. _____ Issue Date: _____

   Addendum No. _____ Issue Date: _____

   Addendum No. _____ Issue Date: _____

   Addendum No. _____ Issue Date: _____

   Addendum No. _____ Issue Date: _____

2. VALIDITY OF PROPOSAL

   The undersigned affirms its Proposal and pricing on the Price Proposal Form is valid for not less than ninety (90) Days from the Proposal Due Date or the Best and Final Offer Date, whichever is later.

3. INSURANCE

   The undersigned certifies it shall meet all insurance requirements as stated in the Sample Agreement upon execution of a Contract.

4. PUBLIC RECORDS ACT

   By submitting a Proposal, the undersigned acknowledges STA is subject to RCW 42.56, the "Public Records Act". The Proposer understands and agrees any record it obtains or produces under this RFP may be a public record under the Public Records Act, or its successor act. The Proposer certifies it shall fully cooperate in a timely manner with STA in responding to a public records request related to its Proposal.

   All Proposals received shall be deemed public records as defined in the Public Records Act and must be released by STA upon receipt of a request for disclosure unless an exemption clearly applies. Any information in the Proposal that the Proposer desires to claim as proprietary and exempt from disclosure under the provisions of state and/or federal law shall be identified on a separate page of the Proposal, providing an explanation of the statutory basis asserted for exempting the information from disclosure. Each page, image, diagram or text claimed to be exempt from disclosure must be clearly identified by the words "Exempt from Disclosure" printed on it. **Marking the entire submittal Confidential or Exempt from Disclosure will not be honored.** STA will review any marked materials for disclosure if a request is submitted and assumes no liability for disclosure of proprietary material submitted by Proposers. Each Proposer will be responsible for protecting any disclosure of its Proposal under applicable law.

PROPOSAL RESPONSE FORM

5. EQUAL EMPLOYMENT OPPORTUNITY

With the submission of a Proposal, the undersigned certifies the Proposer complies with all federal, state and local Equal Employment Opportunity laws, rules and regulations.

6. CONTINGENT FEES

The undersigned certifies the Proposer has not paid or agreed to pay any fee or commission, or offer any other thing of value, contingent upon the award of this RFP, to any employee, official or current consultant of STA. The undersigned certifies the financial information in its Proposal has been arrived at independently and without consultation, communication or agreement for the purpose of restricting competition as to any matter relating to such costs with any other response or Proposer.

7. ANTI-KICKBACK

The undersigned certifies no officer or employee of STA, having the power or duty to perform an official act or action related to this Proposal, has been or will be solicited or granted a present or future gift, favor, service or other thing of value from or to the Proposer.

8. FEDERAL DEBARMENT

The undersigned represents that the Proposer and all entities with any controlling interest herein are not currently, and have not previously been, on any debarred bidders list maintained by the United States Government.

9. UBI CERTIFICATION

The undersigned certifies that no final determination of violation of RCW 50.12.070(1)(b) or 82.32.070(2) has been made by the Washington State Department of Employment Security, Department of Labor and Industries, or Department of Revenue, respectively dated within two (2) years of the Proposal Due Date. The undersigned understands further that no Proposal may be submitted, considered or contract awarded for a public work to any person or entity that has a determination of violation of the above reference statutes within two (2) years from the date that a violation is finally determined and the Proposal Due Date.

10. AWARD OF CONTRACT

If written notice of acceptance of all or part of the Proposal is mailed, sent electronically or delivered to the Proposer within ninety (90) Days after the Proposal Due Date, or the Best and Final Offer date, whichever is later, the Proposer will, within **fifteen (15) Days** after date of such notice, execute and deliver the Contract as specified and furnish all requisite documentation including, but not limited to, Certificates of Insurance, Payment and Performance Bonds, and Subcontractor Proposer Certifications, as required.

PROPOSAL RESPONSE FORM

11. PROPOSAL SUBMITTAL CHECKLIST

This checklist ***must be completed in its entirety, signed and included*** with the Proposal. Failure by the Proposer to properly complete, sign and include this checklist with its Proposal shall render the Proposal non-responsive and shall be grounds for rejection of the Proposal.

A. All RFPs

- ☐ Proposal Response Form (this document)
- ☐ Price Proposal Form
- ☐ IRS Form W-9

Not Required B. RFPs subject to Federal Assistance (complete only if the Instructions to Proposers states the RFP is subject to Federal Assistance)

- ☐ Disadvantaged Business Enterprise Participation
- ☐ Suspension & Debarment Certificate
- ☐ Federal Cargo Certification
- ☐ Buy America Certificate (required for solicitations valued at $150,000 or more)
- ☐ Lobbying Certificate (required for solicitations valued at $100,000 or more)

Not Required C. RFPs subject to Prevailing Wages (complete only if the Instructions to Proposers states the RFP is subject to Prevailing Wages)

- ☐ Certificate of Wage Compliance

Not Required D. RFPs subject to Public Works (complete only if the Instructions to Proposers states the RFP is subject to Public Works)

- ☐ Public Works Responsibility Criteria

PROPOSAL RESPONSE FORM

12. PROPOSER ADMINISTRATIVE INFORMATION

Entity Name: _____
(as registered with the State of Washington)

Physical Address: _____

Mailing Address: _____

Website: _____ Phone: _____

Primary Contact: _____

Email: _____ Phone: _____

Washington UBI No.: _____ Federal Tax Id No.: _____

DUNS No.: _____

Complete for Public Works projects:

Washington Contractor Registration No.: _____

Washington Industrial Insurance Account No.: _____

- Contact for Contract Administration:

Name: _____ Title: _____

Physical Address: _____

Mailing Address: _____

Email: _____ Phone: _____

- Contact for Legal Communications:

Name: _____ Title: _____

Mailing Address: _____

Email: _____ Phone: _____

- Individuals Authorized to Execute a Contract:

Name: _____ Title: _____

Name: _____ Title: _____

PROPOSAL RESPONSE FORM

13. PROPOSER INSURANCE COMPANY

Agency Name: _____

Physical Address: _____

Mailing Address: _____

Primary Contact: _____

Email: _____ Phone: _____

14. PROPOSER SURETY (complete only if bond(s) are required by the RFP)

Surety Name: _____

Physical Address: _____

Mailing Address: _____

Primary Contact: _____

Email: _____ Phone: _____

I CERTIFY, to the best of my knowledge:

- I have read and understand all RFP Documents;
- The information contained in the Proposal, Proposal Response Form, Price Proposal Form, Proposer Certifications, and any documentation attached thereto is accurate and complete;
- I have the legal authority to submit the Proposal and commit this firm to a contractual agreement; and
- Final funding for any good or service is based upon STA-approved budgets and the approval of the Spokane Transit Authority's Board of Directors.

Proposer Name: _____
(as registered with the State of Washington)

Authorized Signature: _____ Date: _____

Printed Name and Title: _____

ATTACHMENT B

REQUEST FOR APPROVED EQUALS, CLARIFICATIONS OR CHANGES

Solicitation Title: _____ Solicitation No. _____

Proposer Name: _____ Date: _____

Document Reference (check one): Page No: _____

☒ General Requirements Section: _____

☐ Specifications Section Title: _____

☐ Contract

☐ Other: _____

PROPOSER'S REQUEST:

STA RESPONSE:

☒ Approved

☐ Denied

Comments:

_____ _____

STA Authorized Signature Date

_____ _____

Name Title

Page 1 of 1

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ATTACHMENT C

NO PROPOSAL FORM

Dear Prospective Proposer:

If you determine not to submit a Proposal in response to this solicitation, we would very much appreciate you completing and returning this form for our files.

Solicitation Title: _____ Solicitation No. _____

Proposer Name: _____

Proposer Address: _____

Contact: _____ Title: _____

Email: _____ Phone: _____

Reason(s) for not submitting a Proposal in response to this solicitation:

Thank you for your assistance.

Purchasing
Spokane Transit Authority
1230 W. Boone Ave.
Spokane, WA 99201
purchasing@spokanetransit.com
(509) 325-6000

ATTACHMENT D

PRICE PROPOSAL FORM

We, the undersigned, propose to provide Spokane Transit Authority with Survey Research Services for the fees listed below, which shall include all travel, in accordance with the Request for Proposals and Scope of Work.

Proposers may provide a Proposal for a single, multiple, or all surveys.

Proposal:

		Fee per Survey		
Survey Description	**Quantity**	**Year 1**	**Year 2**	**Year 3**
Survey #1 STA Employee	3 (1/yr)	$	$	$
Survey #2 Community Perception	3 (1/yr)	$	$	$
Survey #3 Fixed Route Passenger	3 (1/yr)	$	$	$
Survey #4 Paratransit Passenger	3 (1/yr)	$	$	$
Survey #5 Rideshare Market Research	1 (Year 1)	$		

Additional Information:

Proposer: _____

Authorized Signature: _____

Printed Name and Title: _____

Date Signed: _____

PART IV
EXHIBITS

2022-10743_Sample Agreement.docx

PART V
PROPOSER CERTIFICATIONS

NONE