



## **REQUEST FOR PROPOSALS #20-016**

### **HENRY COUNTY TRANSIT MASTER PLAN**

ISSUED BY

**Atlanta-Region Transit**

**Link Authority**

245 Peachtree Center  
Avenue, Suite 2200  
Atlanta, GA 30303

#### **Schedule of Events**

Release RFP	June 15, 2020
EST Deadline for Proposer Written Questions	June 26, 2020 2:00 PM
Responses to Written Questions	July 6, 2020
PROPOSAL SUBMISSION DEADLINE	July 17, 2020, 2:00 PM
Interviews (Optional, by invitation only)	July 28-30, 2020
Notice of Intent to Award (potential)	August 14, 2020
Notice of Contract Award (potential)	August 28, 2020

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## PART 1 – SOLICITATION, OFFER AND AWARD

### 1. General Information

#### 1.1 Purpose of Procurement

The ATL is seeking to retain the services of a firm or team of firms to develop a Transit Master Plan (TMP) for Henry County. The scope of work consists of furnishing all expertise, consultation, labor, materials, transportation, supplies, services, and incidentals to provide the Scope of Services, as further described in this RFP.

The services to be performed shall generally fall into the following National Institute of Government Purchasing (NIGP) commodity codes:

- 91896--Transportation Consulting
- 91832--Consulting

All Proposers responding to this RFP are subject to the instructions communicated in this document, as may be amended, and are cautioned to review the entire RFP and carefully follow the instructions herein.

A complete copy of the RFP document can be accessed on the Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp), and on the ATL website at: <https://atltransit.ga.gov/doing-business-with-atl/>

#### 1.2 Type and Term of Contract

It is envisioned the ATL shall enter into a contract with the selected Contractor. The Contract to be awarded by the ATL shall be for a period of one-year ("Initial Term") with one (1) renewal option of one (1) year (Renewal Term). The renewal of the Contract shall be at the sole discretion of the ATL. All extensions or renewals shall be made in writing and executed by both parties.

#### 1.3 Solicitation Schedule

The Schedule of Events set out herein represents the ATL's estimate of the schedule that will be followed. However, delays to the procurement process may occur which may necessitate adjustments to the proposed schedule. If a component of this schedule is delayed, the Schedule of Events may be shifted as appropriate and at the ATL's discretion. Any changes to the Schedule of Events up to the Proposal Submission Deadline will be posted to the ATL website at <https://atltransit.ga.gov/doing-business-with-atl/>, and on the Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp). It is the responsibility of interested respondents to stay updated by checking the website(s). After the Proposal Submission Deadline, the ATL reserves the right to adjust the remainder of the proposed dates, including the dates for evaluation, award and the Contract term on an as needed basis with or without notice. The following schedule of events shall be followed unless so adjusted:

## Schedule of Events

Release RFP	June 15, 2020
EST Deadline for Proposer Written Questions	June 26, 2020 2:00 PM
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### 1.4 Restrictions on Communications with the ATL, SRTA and Henry County

From the date of issuance of this solicitation through the date of Contract award by ATL, Proposers are not allowed to communicate for any reason with any ATL, SRTA or Henry County staff or Board Members regarding this procurement. All Proposer communications concerning this solicitation should be directed to the Issuing Officer. Prohibited communication includes all contact or interaction regarding this solicitation, including, but not limited to, telephonic communications, emails, faxes, letters, texts, or personal meetings. Unauthorized contact regarding this solicitation may result in disqualification.

### 1.5 Contact Information

All inquiries, offers, submissions, and/or other correspondence regarding this solicitation (excluding protests submitted in accordance with Part 1, Section 2.9 below) must be directed in writing to:

Richard Sawyer, Issuing Officer  
Atlanta-region Transit Link Authority  
245 Peachtree Center Avenue NE  
Suite 2200 Atlanta, GA 30303  
Email: [rsawyer@srta.ga.gov](mailto:rsawyer@srta.ga.gov)

## 2. Solicitation Terms and Conditions/Instructions to Proposers

### 2.1 Deadline for Submission of Proposals/Late Proposals

Proposals submitted in response to ATL Solicitation No. 20-016 must be received by ATL no later than **2:00 p.m. (EST) on July 17, 2020** to ensure that they are evaluated for Contract award by the Evaluation Committee for this procurement. Proposals received after the submission deadline will not be evaluated.

### 2.2 Format of Proposals

Each Proposer shall submit eight (8) copies of its technical proposal, inclusive of one (1) original and seven (7) identical paper copies, and one (1) electronic copy on USB drive submitted with the original. The technical proposal shall consist of all offer documents and supporting documentation requested in the RFP ("Technical Proposal"), **EXCEPT the Offer Document 8- Price Proposal**. The entire Technical Proposal shall be submitted in a sealed envelope and clearly marked "Technical Proposal" with the Proposer name, ATL Solicitation Number and Proposal Submission Deadline on the exterior of the envelope. The "original" paper copy of the Technical Proposal must be unbound. The USB drive shall contain electronic file copies of all complete, signed Offer Documents that are submitted in paper copy format.

Each Proposer shall also submit eight (8) copies, inclusive of one (1) original and seven (7) identical paper copies, and one (1) electronic copy in Excel format on USB drive, of Offer Document 8-Price Proposal in a SEPARATE sealed envelope clearly marked as "Price Proposal" with the Proposer name, ATL Solicitation Number and Proposal Submission Deadline on the exterior of the envelope. **Pricing must be submitted in a separate sealed envelope.**

Both the Technical Proposal and Price Proposal must be submitted to the Issuing Officer by the Proposal Submission Deadline in order for the Proposer's submission to be eligible for evaluation and consideration for Contract award. All paper copies must be clearly marked as being either "Original" or "Copy" as applicable. Electronic copies, submitted on a USB drive, must be submitted in Portable Document Format (PDF), Microsoft Word, and/or Microsoft Excel formats, as applicable. In the event of a discrepancy between a hard copy and electronic versions, the Original hardcopy version will govern.

If a Proposer submits an affidavit referred to in Section 2.5 (Confidential/Proprietary Information), one (1) separate electronic copy in searchable PDF format on one or more USB flash drives of its proposal labeled "ATL Solicitation No. 20-016 [Proposer Name] [Copy of Non-Confidential Portion of Proposal]" that excludes any records attached to such affidavit with no file to exceed 50MB.

All proposals must be prepared and submitted in accordance with the proposal format and content requirements specified in Part 1, Section 3 below. Proposals must be typed. The included required forms may be completed by using the free Adobe Reader software available at <http://get.adobe.com/reader/>. Proposals must be typed in English and all pricing must be provided in US dollars and exclude federal excise taxes as well as any applicable state of local sales and use taxes.

The ATL is exempt from Federal excise taxes; no payment will be made for any taxes levied on Proposer's employee's wages. The ATL is also exempt from State of Georgia and local sales and use taxes. The ATL shall furnish tax exemption certificates, upon request, to the successful Proposer.

As a condition of submission responsiveness, all offer documents that require the signature of Proposer must be signed. Any Contract award made as a result of this solicitation shall bind the Proposer to all of the terms, conditions, and specifications set forth in this RFP.

### **2.3 Location for Submission of Proposals/Methods of Delivery**

Proposals must be submitted exclusively to the Issuing Officer at the address noted in Section 1.5. It is the sole responsibility of the Proposer to ensure that its proposal is successfully delivered to ATL by the specified date and time. ATL is not responsible for late or lost deliveries of proposals, for whatever reason.

Proposals that are submitted by hand delivery or delivery by U.S. Postal Service or private courier/delivery service must be delivered to the administrative office located at 245 Peachtree Center, Suite 2200, Atlanta, GA 30303. The ATL's physical address and mailing address are the same.

All envelopes, packages, and/or boxes (including all envelopes, packages, and/or boxes submitted within a larger envelope, package, or box) containing a proposal on USB drive must be clearly marked with the following identifier on the outside of the envelope, package or box:

**“Proposal in response to ATL Solicitation No. 20-016:  
RFP for Henry County Comprehensive Public Transit Master Plan – July 17, 2020 2:00 p.m. (EST)  
ATTN: Richard Sawyer, Issuing Officer  
To be opened by addressee only.”**

Failure to clearly mark all envelopes, packages, and/or boxes as specified may result in the proposal being discovered and/or opened late. ATL is not responsible for proposals discovered and/or opened late due to Proposer's failure to mark the proposal as specified. Proposals received after the Proposal Submission Deadline, due to late delivery or late discovery due to Proposer's failure to mark the proposal as specified, may result in the ATL disqualifying the proposal from consideration for Contract award.

## 2.4 Questions

Questions regarding the RFP must be submitted in writing, defined as being received in the format provided as Attachment A-Questions Template via electronic mail, by 2:00 p.m. (EST) on June 26, 2020. Written questions must be submitted to the attention of the Issuing Officer, in accordance with Section 1.5 above.

The Contract that the ATL expects to award as a result of this RFP is attached hereto as Part 3 of this RFP. Therefore, all costs associated with complying with the requirements of the Contract shall be included in any pricing submitted by the Proposer.

Please review the Contract and submit any and all questions, clarifications and recommendations to the Issuing Officer by the deadline date and time specified in this RFP. All questions, clarifications, and recommendations must be submitted using Attachment A-Questions Template.

Should there be any changes made to the Contract as a result of requests received, the ATL shall post an updated Contract via formal addendum to the RFP. Absent the issuance of a formal addendum containing an updated Contract, Proposers should plan on the Contract terms and conditions as attached hereto as Part 3-Contract.

Answers to all questions received by the applicable deadline will be posted to both the Georgia

Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp) and the ATL website at <https://atltransit.ga.gov/doing-business-with-atl/>. It is the sole responsibility of the Proposer to make itself aware of ATL's responses to written questions the Proposer has submitted. Responses to questions are provided as information only and do not in any way alter the contents of the solicitation inclusive of the Scope of Services, the remainder of the RFP documents, or the Contract. Revisions to the solicitation or to the Contract shall be made only via formally issued addenda. Only such written addenda posted online shall constitute revisions to the solicitation.

## 2.5 Amendments to Solicitation (Addenda)

The ATL reserves the right to revise or amend the RFP up to the time set for the submission of proposals. Such revisions and amendments, if any, shall be announced by written addenda to the RFP. If an addendum significantly changes the RFP, the date set for the submission of proposals may be postponed by such number of days that the ATL, in its sole opinion, believes is sufficient to enable potential Proposers to address the revised RFP requirements in their proposals. In any case, the proposal submission deadline shall be at least three (3) business days after the last addendum, and the addendum shall include an announcement of the new date, if applicable, for the submission of proposals.

Upon issuance, addenda will be considered part of the RFP and will prevail over inconsistent or conflicting provisions contained in the original RFP. Changes to the RFP will be made in writing via formally issued addenda.

The ATL will not be responsible for a potential Proposer failing to receive notification of the availability of addenda. EACH PROPOSER IS INDIVIDUALLY RESPONSIBLE FOR REVIEWING ADDENDUMS AND ANY OTHER POSTED DOCUMENTS AND MAKING ANY NECESSARY OF APPROPRIATE CHANGES AND/OR ADDITIONAL TO THE PROPOSER'S RESPONSE PRIOR TO SUBMISSION. It is the sole responsibility of each potential Proposer to check the ATL and Georgia Procurement Registry websites daily for addenda.

Proposers shall acknowledge receipt of all addenda by completing and submitting Offer Document #3 (Acknowledgement of Addenda), included in this RFP, as part of its proposal. As with other required documentation, proposals that fail to reference receipt of addenda by inclusion of Offer Document #3 (Acknowledgement of Addenda) may be excluded from consideration for a Contract award.

## 2.6 Single Response to Solicitation

If only one proposal is received in response to this RFP, a detailed cost analysis of the single proposal may be requested of the single Proposer. A cost analysis, evaluation, and/or audit of the proposal may also be performed by ATL in order to determine if the proposal price is fair and reasonable. If ATL determines that a cost analysis is required, the single Proposer must be prepared to provide, upon request, detailed summaries of estimated costs (i.e., labor, equipment, supplies, overhead costs, profit, etc.) and documentation supporting all cost elements.



## 2.7 Confidential/Proprietary Information

Any and all materials submitted in response to this RFP are subject to public inspection, pursuant to the provisions of O.C.G.A. § 50-18-70 et seq., Georgia's Open Records Act, upon completion of the RFP process. Each Proposer will be responsible for clearly identifying and labeling any records contained in its proposal as "trade secret" that the proposer has reasonably determined meet the definition of "trade secret" under Section 10-1-761(4) of the Georgia Code and that the proposer wishes to be exempt from disclosure under Section 50-18-72(a)(34) of the Georgia Code or any other applicable law. The Proposer must attach to its proposal an affidavit affirmatively declaring that specific information in the Records constitutes trade secrets pursuant to Article 27 of Chapter 1 of Title 10 of the Georgia Code.

If the ATL receives a request for public disclosure of all or any portion of the materials identified as "trade secrets" in a proposal in accordance with this RFP, before producing such records in response to such request, the ATL shall notify the Proposer of its intention to produce such records. If the ATL makes a determination that the specifically identified information does not in fact constitute a trade secret, it shall notify the Proposer of its intent to disclose the information within ten (10) days unless prohibited from doing so by an appropriate court order. If the Proposer wishes to prevent disclosure of the requested Records, the Proposer may file an action in Fulton County Superior Court to obtain an order that the requested records are trade secrets exempt from disclosure. The Proposer shall serve the requestor with a copy of its court filing. If the ATL makes a determination that the specifically identified information does constitute a trade secret, ATL shall withhold the records, and the requester may file an action in Fulton County Superior Court to obtain an order that the requested records are not trade secrets and are subject to disclosure.

Proposers are advised that their designation as "trade secret" will not be binding on the ATL or determinative of any issue relating to confidentiality. The ATL will not accept blanket designations that do not clearly identify information and materials that are "trade secrets". The ATL may, in its sole discretion, and subject to compliance with the Open Records Laws and other applicable law, treat the whole of the relevant Section(s)/document(s) that are subject to such a blanket designation as subject to disclosure pursuant to the Open Records Laws.

All material submitted regarding the RFP becomes the property of ATL. Any activity pursuant to this RFP by any Proposer is governed by all applicable laws, including without limitation, Georgia and Federal antitrust laws. The ATL is not responsible to return to a Proposer any or all of the proposal or other information furnished by that Proposer.

In no event will the State, ATL, SRTA, or any of their agents, representatives, consultants, directors, officers or employees be liable to a Proposer or Major Team Member for the disclosure of all or a portion of any proposal submitted in response to this RFP.

Nothing contained in this provision shall modify or amend requirements and obligations imposed on ATL or any other State entity by the Open Records Laws or other applicable law, and the provisions of the Open Records Laws or other laws shall control if there is a conflict between the procedures described above and the applicable law.

## 2.8 Reserved Rights

In connection with this solicitation, ATL and SRTA reserves to all rights (which rights are exercisable by ATL and SRTA in their sole discretion) available under Procurement Policy and applicable law, including without limitation, with or without cause, and with or without notice, the right to:

- (a) modify the procurement process or documentation described in this RFP;
- (b) develop the project in any manner that it, in its sole discretion, deems necessary or desirable, including by modifying the scope of the project;
- (c) cancel this RFP, or a subsequent RFP, in whole or in part at any time prior to the execution by ATL or SRTA of the Contract, without incurring any cost obligations or liabilities except as otherwise expressly stated in this RFP or the subsequent RFP;
- (d) issue a new request for proposals after cancellation of this RFP or a subsequent RFP;
- (e) not issue an RFP;
- (f) reject any and all submittals, responses, and proposals at any time;
- (g) reject any and all proposals or any portion of a specific proposal for any reason;
- (h) modify all dates set or projected in this RFP;
- (i) terminate evaluations of proposals at any time;
- (j) issue amendments, supplements, and modifications to this RFP;
- (k) appoint Evaluation Committees to review proposals, and seek the assistance of outside technical experts and consultants in Proposal evaluation;
- (l) make independent calculations with respect to numbers and calculations submitted in a Proposal for purposes of its evaluation;
- (m) revise the evaluation criteria or methodology by issuing an amendment prior to the Proposal Submission Deadline;
- (n) require confirmation of information furnished by a Proposer, require additional information from a Proposer concerning its proposal and require additional evidence of qualifications or ability to perform the work described in this RFP;
- (o) seek or obtain data from any source that has the potential to improve the understanding and evaluation of the responses to this RFP;
- (p) add or delete Proposer responsibilities from the information contained in this RFP;
- (q) negotiate with a Proposer without ATL or SRTA being bound by any provision of a Proposer's proposal or subsequent Proposal;

- (r) waive administrative or minor deficiencies in a Proposal, accept and review a non-conforming proposal or permit clarifications or supplements to a Proposal;
- (s) disqualify any Proposer who changes its proposal without ATL or SRTA approval;
- (t) disqualify any Proposer from the procurement process for violating any rules or requirements of the procurement specified in this RFP, the RFP, applicable law, or any other communication from ATL or SRTA;
- (u) add to the shortlist of Proposers any Proposer that submitted a Proposal in order to replace a Shortlisted Proposer that withdraws or is disqualified from participation in this procurement;
- (v) (as and solely to the extent applicable) adjust the terms of, or not pursue federal financing programs, or adjust the terms of, or not pursue other financing or public funding for the Project on behalf of the Proposers, or otherwise;
- (w) develop some or all of the Project itself or through another state or local government entity or entities;
- (x) disclose information submitted to ATL or SRTA as permitted by applicable law or this RFP;
- (y) not issue a notice to proceed after execution of the Project Agreement;
- (z) exercise any other right reserved or afforded to ATL or SRTA under this RFP or a subsequent RFP and applicable law; and
- (aa) exercise its discretion in relation to the matters that are the subject of this RFP as it considers necessary or expedient in light of all circumstances prevailing at the time that ATL or SRTA considers to be relevant.

This RFP does not commit ATL or SRTA to enter into the Contract or proceed with the procurement described in this RFP. ATL or SRTA and the State assume no obligations, responsibilities or liabilities, fiscal or otherwise, to reimburse all or part of the costs incurred or alleged to have been incurred by parties considering a response to or responding to this RFP, or any subsequent RFP. All such costs shall be borne solely by each Proposer.

Except as provided in this RFP, in no event will ATL or SRTA be bound by, or liable for, any obligations with respect to the Project until such time (if at all) as the Contract has been authorized by ATL or SRTA and executed by ATL or SRTA and, then, only to the extent provided in the Contract. No Proposer shall have any cause of action against the ATL arising out of the methods by which proposals are evaluated.

The ATL has the sole right to select the successful proposal(s) for contract award(s); to cancel the solicitation and to advertise for new proposals; to award a contract(s) to other than the Proposer submitting the lowest cost proposal; to award multiple contracts; or not to award a contract as a result of this RFP.

The ATL reserves the right to accept any proposal deemed to be in the best interest of the ATL and to waive any irregularity or informality in any proposal that does not prejudice the ATL or other Proposers.

The ATL reserves the right to negotiate with the Proposer whose proposal is considered by the ATL, and in its sole discretion, to be most advantageous to the ATL.

## 2.9 Protest Procedures

The ATL's protest policy shall govern this solicitation, and it can be found at:

<https://atltransit.ga.gov/procurement/>.

## 2.10 Minority Business Participation

The requirements of 49 CFR Part 26, Regulations of the U.S. Department of Transportation, apply to this solicitation and resulting Contract. It is ATL's policy to practice nondiscrimination based on age, disability, race, gender, color, sex, religion or national origin in the award or performance of this contract. All companies qualifying under this solicitation are encouraged to submit proposals. The requirements of this solicitation apply for all Proposers, including those who qualify as a Disadvantaged Business Enterprise (DBE). Proposers with questions regarding DBE certification may contact the Issuing Officer. Additional Contract requirements related to participation by DBEs are specified in Part 3 – Contract of this RFP.

As an incentive to increase utilization of minority-owned businesses as subcontractors on State purchases, the State of Georgia provides for an income tax adjustment on the state tax return of any company that subcontracts with a State certified minority-owned firm to furnish goods, property, or services to the State of Georgia. The Tax Incentive Program is codified at O.C.G.A. §48-7-38 and is managed by the Georgia Department of Revenue.

## 2.11 Ethical Standards

It is a breach of ethical standards for any ATL employee to participate directly or indirectly in a procurement when the employee knows:

- The employee or any member of the employee's immediate family has a financial interest pertaining to the procurement;
- A business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
- Any other person, business or organization with whom the employee or any member of employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

ATL employees are also bound by the Georgia Governor's Executive Order, dated January 14, 2019, for "Establishing a Code of Ethics for Executive Branch Officers and Employees." The Executive Order prohibits ATL and ATL employees, or any person acting on their behalf, from accepting, directly or indirectly, any gift from any person with whom the employee interacts on official ATL business. Therefore, it is unlawful for a potential Proposer, or its subcontractors or suppliers, to make gifts or favors to any ATL employee. It is also unlawful for any ATL employee to accept any such gift or favor. In addition, any persons acting as members of the Evaluation

Committee for this procurement shall, for the purposes of this procurement, be bound by the referenced Executive Order.

Throughout the proposal evaluation and award process and subsequent contract negotiations, Proposers shall not discuss or seek specific information about this procurement, including but not limited to, the contents of submissions, the evaluation process or the contract negotiations, with members of the Evaluation Committee, the ATL Board of Directors, or ATL employees other than the Issuing Officer.

Any prospective Proposer, anyone representing the Proposer, any subcontractor or supplier on the Prospective Proposer's team, or anyone representing a subcontractor or supplier on the Proposer's team who attempts to influence any member of the Evaluation Committee, the ATL Board of Directors, or ATL or SRTA employees in regards to this solicitation by offering or giving any advantage, gratuity, discount, bribe, or loan to any member of the Evaluation Committee, the ATL Board of Directors, or ATL or SRTA employees will have its proposal removed from consideration for Contract award.

## 2.12 ADA Guidelines

The ATL adheres to the guidelines set forth in the Americans with Disabilities Act. Proposers should contact the Issuing Officer at least one day in advance if they require special arrangements when attending any Pre-Proposal Conference (if applicable). The Georgia Relay Center at 1-800-255-0056 (TDD only) or 1-800-255-0135 (Voice) will relay messages, in strict confidence, for the speech and hearing impaired.

## 2.13 Contractual Relationships

The ATL intends to execute a Contract, attached as Part 3 of this RFP. The selected Contractor's contractual responsibility must solely rest with one firm or legal entity, which shall not be a subsidiary or affiliate with limited resources. Proposer's Proposal Letter, included as Offer Document #2 of this RFP, must clearly indicate the firm or entity responsible for contract execution.

## 2.14 Small Business Participation

The ATL strongly supports the participation of small business owners in its contracts. It is the policy of the ATL to ensure nondiscrimination in the award and administration of USDOT- assisted contracts. It is the intention of the ATL to create a level playing field on which Small Businesses can compete fairly for contracts and subcontracts relating to its construction, procurement and professional services activities in compliance with the requirement of 49 C.F.R. 26.39.

## 2.15 Proposal Withdrawal and/or Revision Following Submission

A submitted proposal may be withdrawn and changes to a submitted proposal can be made prior to the Proposal Submission Deadline. In the event a Proposer notes an error or omission in its response which was overlooked prior to submitting the proposal, the Proposer may contact the Issuing Officer to request the proposal be withdrawn. Once the Proposer's response is withdrawn, the ATL has no response from the Proposer. Unless and until the Proposer resubmits the received response, the ATL will have no offer from the Proposer to evaluate for possible Contract award. Any resubmission must be received by the ATL no later than the Proposal submission deadline.

## 2.16 Proposer Conflicts of Interest

Proposer must disclose in detail, with the Proposal, anything that may create a conflict or appearance of a conflict of interest. For purposes of this RFP, "conflict of interest" means any situation or circumstance arising out of existing or past activities, business interests, familial relationships, contractual relationships or organizational structure (i.e., parent entities, subsidiaries, affiliates, subconsultants, etc.) or litigation where: 1.) Proposer, a key team member or key personnel could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of the ATL or SRTA's independent judgment; or 2.) could or could be seen to compromise, impair or be incompatible with the effective performance of its obligations under the resulting Contract.

Required disclosures include, but are not limited to: 1.) any current contractual relationships with the ATL, SRTA, Henry County or any of their employees or board members; 2.) any past, present or planned contractual or employment relationships with any officer or employee of the ATL, SRTA or Henry County; and 3.) any other circumstances that might be considered to create a financial interest in the Contract by any ATL, SRTA, Henry County or any of their respective employees or board members if Proposer is awarded the Contract. The foregoing list is a demonstrative list and shall constitute a limitation on the Proposer's disclosure obligations.

The ATL, in its sole discretion, will make a determination relative to a real or perceived potential conflict for a Proposer and its ability to mitigate such a conflict. A Proposer found to have a Conflict of Interest that cannot be mitigated, as determined in the sole discretion of ATL, shall not have its proposal submission evaluated for Contract Award.

Failure to comply with the requirements in this Section 2.16 or to abide by the ATL's determination in this matter may result in the ATL disqualifying the Proposer from submitting a proposal, disqualifying the offending team member from participating on a Proposer's team or, following submission of a proposal, discontinuing further consideration of such Proposer and its proposal.

Conflicts of interest that arise after the Proposal submission deadline, but before the Notice of Award, must be disclosed in detail in writing to the Issuing Officer.

## 2.17 Contractual Provisions

The ATL shall execute the Contract, attached as Part 3 to this RFP, with the successful Proposer for the provision of the required services with the selected Contractor(s). The selected Contractor's contractual responsibility must solely rest with one legal entity, which shall not be a subsidiary or affiliate with limited resources. Proposer's Proposal Letter, included as Offer Document #2 of this RFP, must clearly indicate the firm or entity responsible for contract execution.

The ATL shall not be a party to agreements between the selected Contractor and/or any subcontractors it may choose to employ during fulfillment of the Contract. Additional contract requirements related to subcontractors are specified in the Contract.

#### 2.18 Registered Lobbyists

By submitting a response to this RFP, the Proposer hereby certifies that the Proposer and its lobbyists are in compliance with the Lobbyist Registration Requirements in accordance with the Georgia Government Transparency and Campaign Finance Commission.

#### 2.19 Responsibility for Compliance with Legal Requirements

Proposer's products, services, and facilities shall be in full compliance with any and all applicable federal, state, and local laws, regulations, ordinances, and standards regardless of whether or not they are referred to in this RFP.

#### 2.20 Conditional Proposals

Terms and conditions attached to a proposal by a Proposer and made a condition of Contract execution may render the proposal non-responsive and may be rejected by the ATL.

#### 2.21 Period that Proposals Remain Valid

Each Proposer agrees that proposals will remain firm for a period of one hundred and eighty (180) calendar days beginning with the date that cost proposals are opened. Following the deadline for proposal submission, no proposal may be withdrawn for a period of 180 calendar days.

Requests for withdrawal of proposals after 180 calendar days following the deadline for proposal submission must be submitted to ATL in writing (defined as being sent or received via letter or on official firm/agency letterhead or by electronic mail). Such requests for withdrawal of proposals must be submitted in writing to the attention of Issuing Officer.

#### 2.22 ATL's Right to Request Additional Information-Contractor Responsibility

Prior to award, ATL must be assured that the selected Contractor has all of the resources to successfully perform under the Contract. This includes, but is not limited to, adequate number of

personnel with required skills, availability of appropriate equipment in sufficient quantity to meet the on-going needs of ATL, financial resources sufficient to complete performance under the Contract, and relevant experience in similar endeavors. If such information is required, the Contractor will be so notified and will submit the information requested within the time requested by ATL.

### 2.23 Sales and Use Taxes

The ATL is exempt from paying sales and use taxes. All pricing provided in response to this RFP shall exclude sales and use taxes.

### 2.24 Proposal Preparation Costs

Each proposal should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete proposal. All costs of proposal preparation, attendance at any pre-proposal and/or pre-award meetings, and any other pre-award costs shall be at Proposer's sole cost and expense. The ATL will not provide reimbursement for any costs associated with proposal preparation.

### 2.25 Placeholders

If a Proposer does not include information or materials in its proposal that are described in the relevant submittal requirements in Section 3 because the required information or materials are not applicable to that Proposer, the Proposer must include in the relevant Section in its proposal a statement to the following effect: "Section[s] [ ] of the ----- do[es] not apply because [Proposer to insert brief explanation]."

## 3. Contents of Complete Proposal

All Proposals should include a table of contents with page numbers and sufficient detail to facilitate easy reference to all requested information. Proposer shall not utilize a font size smaller than 10pt font or have margins that are less than 1-inch. To be eligible for evaluation by the ATL as a complete, responsive proposal in response to ATL Solicitation No. 20-016, any and all proposals submitted to the ATL must contain all of the following documents, properly signed by an authorized representative, fully completed by the Proposer, and numbered and arranged in the following order:

### 3.1 Complete Proposal Checklist

- This document serves as a checklist for Proposers to ensure that their proposal is complete and ready for submission to the ATL. The document is used by the ATL during the evaluation of responsiveness of proposals.
- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank checklist form is attached as Offer Document #1 of this RFP.

### 3.2 Proposal Letter



- This document summarizes the acknowledgements and representations made by and agreed to by the Proposer with regard to its proposal.
- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #2 of this RFP.

### 3.3 Acknowledgement of Addenda to RFP

- This document is required by Part 1, Section 2.5 of this RFP.
- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- If no addenda to the RFP were issued by the ATL, Proposer must still complete the form and include it in its proposal.
- Blank form is attached as Offer Document #3 of this RFP.

### 3.4 Proposer Information Form

- This document summarizes key information about the Proposer for the ATL's assistance and reference during evaluation of the proposals including:
  - Contact Information for Proposer
  - Corporate information
  - List of references for whom Proposer has performed similar services in the past five years
- The ATL will contact the references listed on this document as part of its evaluation of proposals. References provided should have the proposed solution currently deployed or have deployed the solution within the past five years.
- If Proposer is a certified DBE, proof of DBE certification must accompany this document.
- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #4 of this RFP.

### 3.5 Proposer Certifications

- This document must be fully completed, signed, and submitted with the proposal.
- Blank form is attached as Offer Document #5 of this RFP.

### 3.6 Statement of Firm's Qualifications and Experience

- This document shall be provided by the Proposer and shall be a narrative description of the Proposer's qualifications and experience. This narrative description shall include the appropriate use of headings and subheading that address, at minimum, the following elements:
  - Name of lead firm and any sub-consultants

- Brief description of the Proposer (brief history, number of employees, lines of business, areas of specialization, office locations, organization, gross revenue, net income and loss for the current and prior year, parent company (if applicable), recent litigations and outcomes, litigation currently underway, etc.)
  - Description of the firm's experience in performing work of a similar nature to that solicited in this RFP, specifically the provision and implementation for a transit agency, state DOT, or other transportation entity, and the participation in such work by the key personnel proposed for assignment to this project.
  - Comprehensive listing and brief descriptions of relevant engagements started and/or completed during the last five years that are similar in scope and nature to the Scope of Services, attached to this RFP. This comprehensive listing may include other projects not highlighted by the firm in describing its experience in performing work of a similar nature to that solicited in this RFP.
- There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, font size no smaller than 10 pt. with margins no less than 1 inch, on 8.5 x 11 size paper. Proposer should label this document as Offer Document #6 in its proposal. This document shall be limited to 30 pages.

### 3.7 Project Team and Project Approach

- This document shall be provided by the Proposer and shall be a narrative description of the Proposer's project team and approach. This narrative description shall include the appropriate use of headings and subheading that address, at minimum, the following elements:
- Brief description of the team organizations and skillsets, including any proposed subconsultants, and an organizational chart
  - Firm's technical approach to the project and interpretation of the Scope of Services, including the Tasks identified in the Scope of Services section
  - Identify the adequacy of the firm's resources, including personnel, labor, equipment and supplies, etc.
  - Proposed solution, project approach and plan in response to the Scope of Services
  - Listing of key project personnel and their qualifications
  - Geographic location of the Consultant's office performing the work
  - Any special or unique benefits that the proposed team and/or its approach brings to the Scope of Services
  - Any portions of the Scope of Services that the Proposer believes cannot be performed; Proposer shall identify such areas with specificity and provide the rationale regarding Proposer's inability to perform such services
- There is no prescribed format for this document. The format of the document shall be at the discretion of Proposer; however, font size no smaller than 10 pt. In addition, the sample project schedule may be submitted in 11x14 or 11x17 page format. Proposer should label all document(s) submitted in response to this Section 3.7 as

Offer Document #7 in its proposal. This document shall be limited to 30 pages.

### 3.8 Price Proposal

- This document must be fully completed, signed by an authorized representative, and submitted with the **proposal in a separately sealed envelope or package, marked "Price Proposal" on the front of the envelope.**
- The submitted Price Proposal must include all costs of performing pursuant to the final posted Contract.
- The envelope shall contain one (1) signed original, six (6) copies and one (1) electronic version of the Price Proposal. The electronic version of the Price Proposal must be submitted on a USB drive and the file format must be Microsoft Excel.
- A blank Price Proposal is attached as Offer Document #8 of this RFP.

### 3.9 Contract Affidavit under O.C.G.A § 13-10-91(b)(1)

- This document must be fully completed, signed by an authorized representative, notarized, and submitted with the proposal.
- Blank form is attached as Offer Document #9 of this RFP.

### 3.10 Subcontractor Affidavit under O.C.G.A. § 13-10-91(b)(3)

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- If any identified subcontractor is a certified DBE, proof of DBE certification must accompany this document.
- Blank form is attached as Offer Document #10 of this RFP.

### 3.11 Subcontractors and DBEs

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- If any identified subcontractor is a certified DBE, proof of DBE certification must accompany this document.
- Blank form is attached as Offer Document #11 of this RFP.

### 3.12 Certification Regarding Suspension and Debarment

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #12 of this RFP.

### 3.13 Certification Regarding Lobbying

- This document must be fully completed, signed by an authorized representative, and

submitted with the proposal.

- Blank form is attached as Offer Document #13 of this RFP.

### 3.14 Non-Collusion Affidavit

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #14 of this RFP.

### 3.15 Anti-Boycott, Divestment and Sanctions Against Israel Certification

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #15 of this RFP.

### 3.16 Statement of Responsibility

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #16 of this RFP.

### 3.17 Sales and Use Tax Compliance Form

- This document must be fully completed, signed by an authorized representative, and submitted with the proposal.
- Blank form is attached as Offer Document #17 of this RFP.

## 4. Proposal Evaluation and Contract Award

### 4.1 Standards for Award

ATL Solicitation No. 20-016 is a Request for Proposals. The ATL intends to award a contract to the Proposer whose proposal conforms to the solicitation and is determined to be the most advantageous to the ATL, taking into consideration price and other evaluation factors set forth in this document.

In order to be eligible for contract award a proposal must meet all of the following criteria:

4.1.1. The proposal was received by the Proposal Submission Deadline.

4.1.2. The proposal submitted is responsive to the solicitation.

- A proposal shall be considered responsive if it conforms in all material aspects to the requirements of the solicitation at the scheduled time of submission.
- It shall be at the sole discretion of the ATL to determine if a proposal conforms in all material aspects to the requirements of the solicitation.

#### 4.1.2 The Proposer who submitted the proposal is a responsible Proposer.

- A Proposer shall be considered responsible if the Proposer possesses, at the time of Contract award, the ability to perform successfully and a willingness to comply with the terms and conditions of the Contract.

### 4.2 Evaluation and Award Process

All proposals shall be evaluated by an Evaluation Committee. Proposals and evaluations will be kept confidential throughout the evaluation and award process. Only the members of the Evaluation Committee and other ATL staff having a legitimate work-related interest will be provided access to the proposals and evaluation results during the evaluation and award process. Proposals will be evaluated, and a Contract will be awarded in accordance with the following process:

#### 4.2.1 Evaluation of Proposals by the Issuing Officer

- Proposals will first be evaluated by the Issuing Officer for responsiveness in accordance with the standard set forth in Part 1, Section 4.1.1 above. Only those proposals that are determined to be responsive shall be evaluated for Proposer responsibility.

#### 4.2.2 Evaluation of Proposals by the Evaluation Committee

- Proposers who submitted responsive proposals will be evaluated by the Evaluation Committee for responsibility in accordance with the standard set forth in Part 1, Section 4.1.1 above.
- A responsible Proposer is one that the ATL believes to be responsible based on the responses provided on the Proposer's Offer Document No. 3.16 and/or based on Contractor's responses to the requirements of the RFP. The ATL reserves the right to conduct additional due diligence into any Proposer's responsibility status. Such due diligence may include investigations into any of the items set forth in the submitted offer documents.

#### 4.2.3 Scoring of Proposals by the Evaluation Committee

- Proposals that are determined to be responsive and that were submitted by responsible Proposers shall be further evaluated by the Evaluation Committee to determine the Proposal(s) that is/are most advantageous to the ATL. The Evaluation Team will review each proposal to determine its compliance with the RFP technical requirements. All proposals which are considered responsive proposals will be scored in accordance with the scoring criteria detailed below.

#### ***Phase 1-Technical Evaluation (95 point maximum)***

- **Firm Experience** (25 point maximum)- Effective and substantive (relative to key

objectives) experience of the firm in the provision of similar services

- **Qualifications of Key Personnel** (25 point maximum)- Qualifications, relevant experience and availability of proposed key personnel. Proposers must present sufficient and competent staff, the capacity to complete the work in a timely manner and appropriate personnel assignments to administer projects.
- **Project Understanding and Unique Concepts or Innovative Ideas** (30 point maximum)- Understanding of the Henry County Transit Master Plan scope as adopted by the Henry County Board of Commissioners, as well as demonstration of unique concepts or innovative ideas for transit service in Henry County, and demonstration of understanding of the regional transit landscape.
- **Project Management** (15 point maximum)- Proven ability of the proposed staffing team to effectively manage multi-faceted studies and a variety of sub-consultants. Proven ability to manage and supervise large complex studies, projects and analyses.

#### ***Phase 2-Oral Presentations (30 point maximum)***

The ATL may elect to invite three to five (3-5) firms for oral presentations. Should the ATL elect to conduct oral presentations, the basis for selecting Proposers to be invited for oral presentations and scores assigned to each invited Proposer. Proposers that are invited for interviews may earn up to 30 points based on the quality of the oral presentation.

Should the ATL elect not to conduct oral presentations, the evaluation process shall proceed from Phase 1 immediately to Phase 3, with no points being awarded to any Proposer for Phase 2.

#### ***Phase 3-Price Proposal (25 point maximum)***

The Evaluation Committee shall specifically consider information submitted in accordance with Section 3.8. The Price Proposal will be reviewed for reasonableness and proper allocations across project deliverables. Failure to reasonably allocate cost amount deliverables, including, but not limited to, frontend loading of price items, may result in proposal disqualification.

#### **4.2.4 Total Combined Score**

Upon completion of the scoring by the Evaluation Committee, each Proposer will be assigned a Total Combined Score, consisting of the Proposer's scores from Phase 1, Phase 2 (if applicable) and Phase 3.

#### **4.2.5 Best and Final Offer**

The ATL reserves the right, but is not required, to request a Best and Final Offer from the Proposer(s) after the Evaluation Committee has completed scoring. BAFOs

may be requested from one or more Proposers. In the event that a Best and Final Offer is requested, the request will indicate: 1.) the elements of the proposal for which revisions are requested; 2.) the criteria by which the revised proposals will be evaluated; 3.) any additional questions that the Proposer must respond to; and 4.) the method of submission and the deadline for submission of revised proposals and pricing. Additional discussions between the ATL and the Proposers may not take place during the BAFO period.

If a BAFO is requested, the final Contract award will be based on the highest point total using the following formula:

$$(\text{Original Technical Score}) + (\text{Oral Presentation Score, if applicable}) + (\text{Best and Final Offer Cost Score}) = \text{Final Total Score}$$

If a BAFO is not requested, the final Contract award will be based on the highest point total using the following formula:

$$(\text{Original Technical Score}) + (\text{Oral Presentation Score, if applicable}) + \text{Price Proposal Score} = \text{Total Combined Score}$$

#### 4.2.6 Notice of Intent to Award and Notice of Award

The preliminary results of the evaluation may be announced through the public posting of a Notice of Intent to Award to the ATL website. The Notice of Intent to Award (“NOIA”) is not notice of an actual contract award; instead, the NOIA is notice of the ATL’s expected contract award(s) to be pursued. The NOIA (if any) will identify the apparent successful Proposer.

At the end of the evaluation process, the ATL shall contact the apparent successful Proposer. The apparent successful Proposer must return two signed copies of the Contract to the Issuing Officer within one (1) week of notification. Failure to do so may lead to rejection of the Proposer. The ATL reserves the right to proceed to discussions with the next highest ranked Proposer. The ATL reserves the right to modify the Contract be consistent with the successful offer.

The Notice of Award is ATL’s public notice of actual Contract award and will be publicly posted to the ATL website.

## ATTACHMENT A-QUESTIONS TEMPLATE

**Instructions:** Pursuant to Part 1, Section 2.4-Questions of the RFP, Proposers shall use this attachment to submit questions regarding the RFP to the ATL.

#	RFP document / Section	RFP page #	Question
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

**Instructions:** Pursuant to Part 1, Section 2.4-Questions of the RFP, Proposers shall use this attachment to submit questions regarding the Contract to the ATL.

#	Contract Provision Title	Contract Section Number	Current Wording of Section	Reason for Exception (Cite relevant law or provide business reasons.)	Proposed Language
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

**Firm Name:** \_\_\_\_\_

**Authorized Representative's Name:** \_\_\_\_\_

**Authorized Representative's Signature:** \_\_\_\_\_



## PART 2 – SCOPE OF SERVICES

*NOTE- ATL considers the services which are envisioned and generally described below to be necessary, and currently intends these items and services, as a minimum, to reflect the Scope for a prospective Contract. The actual, final scope of services, however, may differ, may be greater or lesser, and shall be determined in the subsequent RFP processes prior to execution of a Contract with a successful firm.*

# Henry County Transit Master Plan Scope of Services

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## Project Overview

Henry County herein referred to as the County wishes to develop a Transit Master Plan (TMP). This planning study will assist the County in identifying short, mid, and long-range plans for Henry County Transit (HCT)—the County’s public transportation service provider, including future development and capital priorities. The plan will address the system as a whole and include operational improvements and a capital plan. The plan will inform County decision makers of the most effective way to leverage funding to increase ridership and subsequently fare revenue, while also addressing the public transportation needs of the County. The purpose of this study is to not only provide a short term development strategy, but also to provide direction and guidance in how the County should develop its public transportation program to best support the continued growth and development of Henry County.

Henry County has grown significantly in population. In addition, a new decennial Census is being conducted in 2020. This new Census is expected to show that Henry County has become more urbanized. This transition from a more rural or suburban county into an urbanized area has major financial ramifications for HCT. HCT, as a rural area transit service provider per the 2010 Census, has been receiving federal transit operations funds from the Federal Transit Administration (FTA). Once the 2020 Census data is released in around 2022, such federal transit operations funding dedicated for rural areas is expected to decline or diminish, and HCT, as an urbanized area transit service provider, will be expected to be more self-reliant or secure state/local funds for transit operations. At this time, there is not another source of funds identified for operations to replace the to-be lost federal funds earmarked for rural areas. Henry County, therefore, urgently needs to come up with a transit plan defining what type of transit service (fixed-route, demand-response, micro-transit, etc.) is feasible and a robust financial plan for how fund such service.

The TMP will serve as a tool to inform Henry County officials and its residents about future public transportation needs, the projects that address those needs, and the cost and benefits of those projects; based on an evaluation of potential funding sources. Review of adjoining county as well as regional transit plans will also be required so that the Consultant can provide context around Henry County Transit projects and how they will connect to the larger regional network.

## Project Timeframe

It is desired that Tasks 1-10 be completed in twelve (12) months, but open to discussion and negotiation,

from the Notice to Proceed (NTP) date. The Consultant is encouraged to recommend proposed changes to this timeframe as part of the suggested modifications to the Project Management Plan (PMP) described in below.

## Project Management Team

The Project Management Team (PMT) will have an Atlanta-Region Transit Link Authority (ATL) staff person and a small group of staff and stakeholders chosen by Henry County. This team will meet regularly to ensure the project stays on schedule, provide direction and data as needed to the consulting team, and review and provide feedback on deliverables.

## Services

The following critical issues are a starting point of consideration for the study:

- How much do Henry County current services need to change to meet future demands?
- How does Henry County serve the most people as efficiently as possible?
- Where are potential new markets; where are unserved/underserved areas, and where is growth occurring (residential and jobs)?
- How does Henry County access new markets in suburban areas and new employment centers throughout Henry County?
- What market research tools will inform Henry County of key customer travel behaviors and attitudes in order to increase existing ridership and attract new riders?
- How does the Consultant plan to engage the public in a dialogue of public transportation needs and expectations as part of this study?
- What is the optimum balance of public transportation services between commuter, point to point, and senior services?
- Who are the peer agencies for Henry County? How do their performance compare to ours?
- What attributes of system and route performance should be most important?
- How does Henry County best serve an increasingly aging population?
- What options and opportunities does Henry County have for integrating micro-transit into its current demand response services?
- What capital and operating requirements are necessary to achieve the vision for public transportation in Henry County?

## Task 1 – Project Kick-Off

Immediately following receipt of the Notice to Proceed, the Consultant will hold an informal kickoff meeting with the PMT to set expectations for the schedule, communication protocols, product deliverables, and project coordination. The Consultant will then use that input toward preparation of a Project Management Plan (PMP). The PMP will identify roles and responsibilities, communication protocols, a schedule and format for regular progress reporting, and a system to track the completion of action items. Within two weeks of the kickoff meeting, the Consultant will submit the draft PMP to Henry County. The PMP will also identify those specific mechanisms that will be used for project coordination. The PMT will meet regularly, perhaps monthly, or as agreed. A Technical Committee will also be identified as a means of discussing technical data and methodologies and soliciting input of a technical nature. The Technical Committee will likely include the PMT plus technical staff from appropriate local, state and regional stakeholders.

### **Deliverables:**

- Kickoff meeting – immediately following the notice to proceed.
- Project Management Plan (draft and final, 10 copies each along with pdf/word files)
- Identification of Project Management Team and Technical Committee

### **Task 2 – Public Involvement**

This plan is to have considerable opportunities for public comment and outreach. It is critical to understand the needs, issues and opportunities for both the short, mid, and long-term future of public transportation within Henry County. The Consultant will document a specific plan for community outreach and involvement in a Public Involvement Plan (PIP). The specific strategies and tools identified for use will result in meaningful and abundant feedback from across a diverse citizenry.

While traditional public meetings and a project website will be used, the Consultant will also utilize stakeholder committees and stakeholder interviews. This will allow for greater involvement from representatives of a diverse cross-section of community groups, such as:

- Institutions
- Business Community Leaders
- Neighborhood groups (homeowner's associations, senior living facilities, etc.)
- Special-interest groups (Non-profits, seniors, mental health, disabled, etc.)

Additional advisory committees may be established to provide policy and/or technical input as the update progresses. PIP should address these as an option.

The PIP will utilize online tools and surveys and may use social media, as well as informal, small group meetings to reach out to stakeholders.

The PIP will identify specific tools and techniques for outreach to traditionally underserved or traditionally less involved populations. The PIP will also identify two public opinion polls to be conducted during the TMP development. The Consultant shall also review all relevant community engagement efforts performed by other transit operating agencies. Public outreach, in utilizing various methods and means, is to be considered

a critical element in all aspects of this TMP development, and it is expected that the Consultant will lead this effort. The PIP will outline the public outreach and stakeholder engagement process to be utilized in Tasks 4 and 5. The PIP will need to take into consideration Henry County's most recent Title VI analysis and work to ensure that Non-English and Limited English Proficiency populations are part of the PIP program. A draft PIP will be submitted to the PMT within four (4) weeks of receipt of the Notice to Proceed. The Consultant will meet and discuss the PIP with the PMT and will then incorporate refinements or revisions to the PIP as discussed and as practicable within the scope and budget of the TMP contract.

The Consultant will design, create, and launch the initial project website. Henry County may be the host of such website. The initial purpose of the website will be to provide information about the TMP and provide a place where updates and future documents will be posted for public consumption. In addition, an avenue for contacting the project team and submitting comments will be incorporated. The Consultant will develop the content and design of the website with the PMT as well as appropriate Henry County staff.

Henry County plans to invite and involve its four municipalities (Stockbridge, McDonough, Locust Grove, and Hampton) in the transit plan development process. The PIP, therefore, should acknowledge the fact that the adoption of the final TMP will be made by the Henry County Board of Commissioners and the Cities in the County. The PIP should therefore reveal strategies on how to interact and involve the city councils and the county commissioners, both as a body and individually.

It is noteworthy to point out here that Henry County is also planning to undertake the update of the County's Comprehensive Transportation Plan and the development of a Henry County Trails Plan concurrently. We would expect the consultant teams chosen for the three projects to coordinate and cooperate with each other on public involvement for efficiency. For example, we may determine that it is more efficient to conduct one online survey or one public information open house for all three plans rather than three separate surveys or public meetings for the three plans.

### **Deliverables:**

- Public Involvement Plan (draft and final, 10 copies each within 4 weeks of notice to proceed)
- Launch initial project website

### **Task 3 – Inventory & Assessment of Existing Conditions and Trends**

The Consultant will complete an inventory and analysis of existing conditions and trends. Much of the necessary data is readily available from Henry County, the ATL, the Atlanta Regional Commission (ARC), Georgia DOT, and recent planning documents. The Consultant will obtain, review and summarize the following information:

- Performance metrics and ridership information from Henry County Transit
- Performance metrics and ridership information from other public transportation service provided in the county by Xpress, private providers, etc.
- Performance metrics from at least three peer public transportation agencies of similar size and scope for peer review and trend analysis

- Transfer Analysis (if applicable)
- Bicycle and pedestrian facilities that support public transportation (i.e. last mile connectivity)
- Technology (such as dispatch software, automatic vehicle location, fare systems, etc.)
- Origin and Destination data for both Inter and Intra county trips
- Past, current and future growth – including population, employment, and land uses from County and City Comprehensive Plans and from ARC's recent projection data
- Planned and programmed transportation improvements – from ATL, GDOT, ARC and from County and adjoining jurisdictions
- Past and present funding for capital, as well as for maintenance and operations – from Henry County and other data/funding sources
- Applicable results from the most recent ARC On-Board Survey

In addition to the data listed above, the Consultant will conduct a Data Meeting with County staff to discuss data sources and availability. The primary purposes of this meeting will be to identify pertinent data, identify any gaps in available data, and identify the appropriate means of obtaining that data. The Consultant will also invite and seek to include staff from ATL, ARC, and GDOT.

The Consultant will also inventory and analyze citizen and stakeholder opinions and views as part of the analysis of existing conditions through three primary tasks – stakeholder interviews, a public opinion poll, as described in the PIP, and an on-board survey. Up to ten (10) stakeholder interviews will be conducted during Task 3. The initial public opinion poll may be combined and coordinated with any other recent or ongoing opinion polls or market research surveys sponsored by Henry County or other regional public institutions.

The Consultant will obtain, review and summarize this information in an Existing Conditions Memorandum. Data will be summarized in tables, graphs, infographics and maps rather than including lengthy data tables in the memorandum. All data obtained will be organized electronically and provided to the County and ATL. The memorandum should be easy to read and be graphically focused and demonstrate trends to the greatest extent possible.

The Consultant will submit a draft Existing Conditions Memorandum to the County in both electronic and hard copy, with up to ten hard copies provided as requested. Upon receipt of comments from the PMT the Consultant will update and revise the Existing Conditions Memorandum as appropriate. A listing of comments, responses and revisions will be prepared along with the revised Existing Conditions Memorandum. The final Existing Conditions Memorandum will be provided in both electronic and hard copy, with up to ten hard copies provided as requested. (This same process for delivery of reports - submit draft, review and comment, produce final along with listing of changes - will also be followed for subsequent technical memorandums in this scope.)

### **Deliverables:**

- Existing conditions data
- Data meeting with County staff

- Existing Conditions Memorandum, draft and final

## Task 4 – Transit Vision Development

The Consultant will assemble and review existing land use, economic development, transportation, and urban design/small area studies (e.g. LCIs, Master Plans, Special Studies, etc.) from each city and the County, and any applicable GDOT plans. These plans, studies, and pertinent data will be synthesized to establish guiding principles for future community development and economic development strategies within each municipality and for the County in its entirety.

After reviewing and synthesizing the plans of each city, the Consultant will conduct leadership/stakeholder interviews with each participating city. Upon completion of the synthesized plans, leadership/stakeholder interviews, and any necessary revisions, the Consultant will conduct the first series of public engagement meetings throughout the County. The first round of public engagement meetings will focus on communicating each city's documented vision and the resulting county-wide plan for community and economic development. Outreach meetings will foster input and discussion regarding the transit vision, opportunities to create a more connected future, and the potential role that transit might play in enhancing or realizing that future. The transit discussion during the first round of meetings must not be a presumed result.

The Consultant will review the results and input from the first round of public engagement meetings with the Technical Committee Meeting and revise and/or fine tune the project statement guiding the development of the Transit Master Plan based on community input.

### Deliverable:

- County wide Transit Vision

## Task 5 – Short, Medium and Long-Term Needs

In Task 5 the Consultant will assess future needs, develop a listing of potential strategies to address those needs, and conduct analyses of candidate improvement strategies and projects. The Consultant will approach the assessment of future needs in three elements:

1. Short-term needs items that can be implemented in the next 12 months and take into consideration current and future locally and federally approved budgets
2. Medium-term needs for recommendations and consideration for the next 2-7 years
3. Long-term needs to develop a strategy to address the public transportation needs of Henry County up to 2050

The Consultant will consider the Title VI requirements for short, medium and long-term needs, and conduct the analysis to meet the Title VI Requirements and Guidelines for Federal Transit Administration (FTA) Recipients (FTA C 4702.1B) for the Short-Term needs. This specific requirement is to collect and report demographic data (including passenger surveys) and monitor transit service relative to Henry County public transportation service standards and policies.

First, short-term needs and potential improvements will be examined and developed. This analysis will rely on an extrapolation of existing travel conditions and demands. This method will allow for identifying needs and testing short-term improvement concepts. The short-term needs and operational plan may include, but is not limited to, local fixed route service, and improvements on the Xpress service in Henry County. Additionally, the short-term needs should provide an analysis comparing the County's current demand response services with options to integrate or shift the demand response program to a more micro-transit focused service. The short-term plan should strive to remain within the current budget and any implementation strategies should take into account the Henry County Board of Commissioners' 2021 approved budget. It should also consider the current available fleet, potential impacts of the COVID-19 pandemic on transit needs and budget impacts, and any upcoming major construction projects that may have a substantial impact on service.

The Consultant will prepare and submit a Short-Term Needs Assessment Technical Memorandum. This Technical Memorandum should include revenue neutral improvement to the System including a list of lower cost improvements or amenities for increase in service and revenue potential. For the Short-Term needs, the Consultant will also prepare an operating plan.

The Consultant will assess Medium-Term needs and will provide a Medium-Term Needs Assessment Technical Memorandum that outlines the next level of service delivery implantation and determines the required financial and capital resources for deployment.

The Consultant will assess Long-Term needs and will provide a Long-Term Needs Assessment Technical Memorandum that can be built by using travel demand modeling and analyses of year 2050 travel conditions derived from the County Transportation Plan or ARC's most recent Regional Plan. The scenario development for long term transportation needs should not be limited to rubber-tired vehicles but should explore all feasible public transportation options. This analysis can include but is not limited to the development of high capacity, dedicated right-of-way solutions and disruptive technology solutions. The assessment should also include the next steps for the development of future projects as well as detail the funding, requirements, availability and implications for the County.

Task 5 will conclude with an extensive effort to share the findings of the assessment of future needs and solicit feedback on potential improvement strategies. Specific efforts will be further detailed in the PIP but will include meetings with the Technical and Stakeholder Committees and online mechanisms. Public outreach should include both current riders of the system and outreach to populations currently not using the service but would under different conditions.

### **Deliverables:**

- Short-Term Needs Assessment Technical Memorandum (including route and system maps, schedules, maps, text and tables, 25-35 page working draft document, draft and final, up to 10 copies)
- Medium-Term Needs Assessment Technical Memorandum (including maps, text and tables, 30-50 pages working draft document, draft and final, up to 10 copies)
- Long-Term Needs Assessment Technical Memorandum (including maps, text and tables, 30-50 pages working draft document, draft and final, up to 10 copies)

- Title VI Analysis Comparison for the current system vs the Short-Term Changes Plan (draft and final, 20 copies each)
- Digital (GIS) Updated Public Transportation Layer Map with list of recommended changes

## Task 6 – Fare Policy Overview and Recommendations

The Consultant will then analyze and develop fare policy recommendations based on the current Henry County fare structure and the capabilities available through current or developing technologies. The goal is to maximize ridership, revenue, and funding sources while providing customers an easy to understand system and identify programs that will speed up the boarding process. The Fare Policy Overview and Recommendations should consider any changes to the current fare program and how to best implement region wide fare initiatives seamlessly within the current program. This may include developing options such as mobile fare payment solutions and must dovetail into what is being developed by the ATL.

Additionally, fare programs may be considered such as employer based pass programs, etc. The County would like recommendations on an overall program that is competitively priced given other regional considerations and disruptive technologies that are on the market. This analysis should also include program delivery that considers Henry County public transportation as a part of the host of other services provided by the County and how public transportation can support the overall mission and services delivery. The Fare Analysis is to include calculations based on the preferred recommendations for ridership and revenue.

### Deliverables:

- Fare Policy Technical Memorandum

## Task 7 – Alternative and Regional Transit Connections

Henry County is part of a diverse and active metropolitan region. It is important for Henry County and the region as a whole, to find opportunities to interconnect systems and provide seamless travel wherever possible, this includes but is not limited to MARTA and Xpress.

The Consultant will, as part of the TMP, consider regional and alternative public transportation and transit demand programs that will enhance the Henry County's transit program and provide more choices to current rider and non-rider populations to opt for non-automobile trips. Partnerships, technology platforms and other current or trending programs in transit should be considered for its applicability within the County.

### Deliverables:

- Alternative and Regional Transit Connections Technical Memorandum (including maps, text and tables, 10-20 page working draft document, draft and final, up to 30 copies)

## Task 8 – Financial Considerations

Based on the work in Tasks 3-7, the Consultant will perform a financial analysis that includes the various



costs, funding strategies and options for all the service improvement strategies proposed in Task 5. The analysis will include the following components:

- Funding requirements, including annual capital and operating costs
- System life cycle costs, maintenance, replacement, and expansion schedules
- Funding strategies and opportunities including potential local funding options

The Consultant will prepare a comprehensive list of potential funding sources to meet the funding requirements of each option and engage the Technical Committee in a discussion of their viability. Using this financial information, the Consultant will develop a spreadsheet-based financial model that integrates macroeconomic assumptions, revenue projections from existing funding sources, transit system service levels, operating and maintenance (O&M) costs, capital cost estimates for bus and high capacity transit improvements, and assumptions on project timing to estimate future cash flows. The model will include a forecast of federal funding, potential funding from other sources and revenue that would be generated through a Henry County sales tax referendum.

The Consultant will facilitate a series of financial briefings and working sessions with a Financial Taskforce to build collective agreement on the reasonableness of assumptions used in the financial model. The will document the process and results of this effort in a technical memorandum for review and approval the Technical Committee.

#### Deliverables:

- Draft and Final Transit Investment Technical Memo

### Task 9 – Evaluation of Henry County Transit Rebranding

Henry County has observed how neighboring transit operators in the Atlanta region have developed unique names, branding, and logos for their transit systems such as Cobb Linc, Gwinnett County Transit, and Cherokee Area Transportation System. Henry County is interested in rebranding its existing transit service to align with the recommendations coming out of the Henry County Transit Master Planning effort, to include a new name for the service, as well as a new logo.



The Consultant will evaluate how Henry County Transit services could be rebranded to align with the recommendations coming out of the Henry County Transit Master Plan. These recommendations should include three new names for the Henry County Transit service that are memorable, engaging, and aligned with the County's vision for Henry County Transit. Additionally, as part of this evaluation, the Consultant will submit three potential logos created by a professional graphic designer for potential use as part of the

rebranding efforts of the Henry County Transit service. This rebranding evaluation, along with the proposed names and logos will be submitted to the Henry County Board of Commissioners for review, and discussions of next steps.

**Deliverables:**

- Evaluation of Henry County Transit rebranding aligned with recommendations from TMP
- Three (3) potential new names for Henry County Transit
- Three (3) potential new logos for Henry County Transit

## **Task 10 – Final Documentation**

The Consultant will prepare a Transit Master Plan (TMP) that summarizes all deliverables and final recommendations. The document will outline a clear implementation plan for policy and programmatic actions to support the growth and sustainability of transit service in Henry County. The implementation strategy will assign roles and responsibilities and will include a range of funding scenarios and performance goals. The document will outline the planning process, public outreach and stakeholder engagement process and how it affected the planning process, the preferred transit investment scenario, funding plan, and implementation strategies. The Consultant will also develop an executive summary as a stand-alone document.

Upon or in conjunction with the completion of the Draft TMP, the Consultant will facilitate up to four (4) public information sessions or open houses to provide an opportunity for public review and comment of draft findings and recommendations.

**Deliverables:**

- Draft and Final Transit Master Plan
- Executive Summary