

Whatcom Regional Travel Survey REQUEST FOR PROPOSALS



whatcom council of governments

RFP Issued	Wednesday, December 18, 2024
Proposals Due	Wednesday, January 22, 2025
RFP Website	www.wcog.org/rfp
Questions & Submittals Email Address:	RFP@wcog.org

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1. Abstract

The Whatcom Council of Governments requests proposals to complete a household travel survey that will inform regional planning efforts, travel demand model development and the assessment of transportation needs.

2. Background Information

Situated along the U.S.-Canadian Border in the northwestern most section of Washington State and in between two major North American metropolitan areas – Seattle, WA and Vancouver, B.C. – Whatcom County is a geographically diverse mixture of urban and rural communities that is home to nearly 240,000 residents. Travel needs and habits vary countywide. The City of Bellingham serves as the regional economic hub for employment, shopping, entertainment, education, and medical facilities.

The Whatcom Council of Governments (WCOG) is the metropolitan planning organization and regional transportation planning organization for Whatcom County. WCOG serves as a forum for local governments to advance cooperative and comprehensive transportation planning at a regional scale. A key product developed by WCOG is the regionwide long-range transportation plan that utilizes a travel demand model to develop forecasts of multimodal conditions based on how and where community growth is planned to occur.

The last household travel survey conducted was the *2018 Whatcom Regional Travel Study*. Since then, the COVID-19 pandemic and technological advancements have influenced daily travel habits that have resulted in increased work-from-home employment options and expanded delivery services. Whatcom County has also added nearly 20,000 residents who are challenged to find a home amidst a limited housing supply and escalating costs. Additionally, roadway capacities are limited, and transit services are challenged to adapt bus and paratransit services to meet the evolving demand. These factors indicate the ever-changing travel behaviors that are fundamental to track and inform current and future transportation planning investments.

3. Project Overview

The Whatcom Council of Governments (WCOG) is seeking to produce a regionwide household travel study by recruiting at least 1,200 households from communities throughout Whatcom County. The study has two essential parts, the first part will gather household information through a questionnaire and the second part will track residents' daily trip activities. The key requirements of the survey include:

- Demographic and questionnaire information collected for households and persons to be obtained from all households recruited to participate in the survey.
- Passive data collection will be sampled and reported for the entirety of the region. The resulting data and reporting will also include two geographies that have distinct daily travel habits:
 1. Bellingham city limits
 2. Whatcom County (west of North Cascades National Park)
- Mapping of routes' origins-destinations of survey travelers utilizing a location-based service app.

WCOG staff will manage the project to ensure that all survey procedures and protocols are being correctly carried out and ensure overall quality. WCOG estimates the total cost to be approximately **\$340,000**.

4. Scope of Work

The general scope of work is expected in the following outline. Applicants are encouraged to consider best practices in conducting household travels surveys, review data needs of the regional travel demand model, and suggest changes in the Scope of Work section if warranted. WCOG expects to set up regular and on-going meetings throughout the entirety of the project to understand all tasks laid forth, provide advice, and be informed of any identified and resolved problems.

4.1 Design Survey

The contractor shall prepare a survey design and sampling plan for the two-part household survey that includes demographic information gathering and daily travel tracking. An initial target sample of 1,200 households has been established based on total households and prior surveys. WCOG is also interested in having the survey participants answer questions about transportation choices and behaviors that can be used as the start of more frequent, on-going surveys.

The following household and socio-economic information shall be considered in the preparation of the survey questionnaire, and corresponds with U.S. Census Bureau definitions and classifications, where applicable:

- Home address
- Household size, income, workers
- Housing type and tenure (owner/renter)
- Age, gender, ethnicity, race
- Employment status, occupation and industry
- Disability status
- Level of education
- School enrollment status
- Limited English proficiency
- Smart-phone ownership and landline status
- Driver's license status
- Number and type of household vehicles available (including EV)
- Package delivery

Travel diary details will be collected primarily through smartphone app users for a minimum seven-day period. There will also be online or call-in reporting options, for those who need it, for at least one 24-hour mid-weekday.

4.2 Develop Survey Materials

The consultant shall plan for the survey and prepare all survey materials and equipment.

- Develop survey app, online data collection platform, and call center
- Confirm objectives, timing, size of main study
- Prepare a QA/QC plan and for survey mitigations
- Develop questionnaire (combination of standard questions and local questions to be consulted with WCOG)
- Develop an invitation and recruitment strategy that emphasizes socially vulnerable populations of lower incomes, higher minorities and limited-English speaking proficiency
- Coordinate with WCOG staff to ensure survey information meet all necessary inputs to update and calibrate the regional travel demand model
- Develop study logo, website and printed materials for recruitment and access
- Include incentive strategy to compensate households for their participation

4.3 Conduct a Survey Pilot or Pre-Test

Prior to full survey implementation to identify and incorporate any necessary adjustments, the consultant may conduct a survey pilot or pre-test. The survey pilot or pretest will be used to refine the survey procedures, survey materials, and interviews.

4.4 Conduct the Survey and Collect Data

The consultant shall disseminate survey materials and provide follow-up to survey participants. The consultant will do the following:

- Select the sample population of households for the survey to most accurately reflect regional demographics
- Implement invitation and recruitment mailing strategy to successfully recruit the target sample of households using the survey methods, materials and procedures
- Gather questionnaire data including household size and income cross-classifications that correspond to the participants for input into the travel demand model. The income stratifications are currently set in increments of \$25k.
- Facilitate the travel diary part of the survey to collect data from app users, online and/or call-in user options.

4.5 Prepare Survey Data, Reports and Associated Documentation

The consultant shall clean, process and weight the collected data; document the dataset; and provide a descriptive analysis of the dataset. The deliverables shall include:

- Final, quality-controlled and weighted household travel survey dataset including data collected at the household and person level and includes mode, day, trip type and locations.
- Documentation and final reporting on the methodology and statistical summaries of the data. Include a user guide and data dictionary for the datasets, and appendices documenting materials used along with other project components for reference.
- Trips origin and destination routing for mapping purposes to be coordinated with WCOG staff.

WCOG shall have an opportunity to review and comment on the consultant reports and data.

5. Project Timeline

The duration of the household travel survey project is approximately one year. The data collection must be performed while area colleges and public schools are in session during the Fall Season from September 29th through November 24th. The target project completion is expected to be no later than **April 30, 2026**.

Tasks	2025								2026			
	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Kick-off and Work Plan	█	█										
Survey Design & Sample Plan			█	█	█							
Pretest/Pilot and Assess					█							
Conduct Survey						█	█	█				
Process Data								█	█			
Draft Reports / Deliverables										█	█	
Final Report / Deliverables												█

6. Proposal Instructions

Proposals submitted in response to this RFP shall clearly describe:

- Professional credentials and experience of the firm, along with any subcontractors and key personnel of all firms proposed for this contract. The experience should be specific to designing and implementing successful household travel surveys for regional planning and for application in travel demand models.
- Details of the approach for accomplishing the household travel survey project, including a work plan, management plan and schedule.
- The technologies, software and data sources that will be used in the survey and data processing.
- Identify tasks, due dates, and consultant personnel commitments in sufficient detail to permit WCOG to fully understand the intentions and activities of the consultant. For example, provide a timeline for each task in the project and provide a matrix with personnel involved in the project with the amount of hours dedicated to each task. Additionally, provide all-inclusive rates of each person, non-personnel costs, and the cost of each task along with the total project cost.
- The proposed contractors and subcontractors shall provide a reference list of clients that have contracted with the proponent to do similar work to this project. The names, title, and contact information shall be included for each reference.

7. Questions

For administrative questions please contact Lethal Coe at (360) 685-8390 or by e-mail to rfp@wcog.org.

Non-administrative questions (such as clarifications about the scope of work, selection criteria, etc.) regarding this RFP may be submitted by e-mail only to: rfp@wcog.org. For the benefit of all proponents, questions and responses will be anonymously posted on WCOG website.

All questions must be submitted by **5:00 PM (PT) on January 8th, 2025**.

8. Submission Deadline

Proposals must be received by **Wednesday, January 22nd, 2025 by 5:00 PM (Pacific Time)**.

Email proposal to rfp@wcog.org.

Late proposals will not be accepted.

9. Selection Process

The proposals will be evaluated by WCOG staff and a selection committee. WCOG reserves the right to accept or reject any proposal received from this RFP. Conversations may take place between WCOG and proposers for purposes of clarification. Proposers will be held to the information submitted in their proposal and subsequent negotiations. In evaluating the proposals, the following criteria will be considered by the WCOG selection group in a points-based format:

Criteria	Points
Methodology and approach	40
Experience and qualifications of the project team	40
Project schedule and budget	10
Relevant references	10
Total	100

Up to three finalists may be selected from the highest scoring proposals for a video conference interview with the selection committee. Thereafter a final ranking provided by the selection committee will result in a first choice, and so on, to negotiate towards an agreed contract. The RFP selection process will proceed on the following timeline:

Date	Selection Process
December 18, 2024	Advertise
January 8, 2025	Deadline for questions
January 22, 2025	Proposals due
February 4 - 6, 2025	Interview finalists
February 7, 2025	Notice of first choice selection

10. Alternative Formats

Persons with disabilities may request this information be prepared and supplied in alternative forms by calling WCOG at (360) 685-8390.

11. ADA and Civil Rights

The Whatcom Council of Governments, in accordance with Title VI of the Civil Rights Act of 1964, (78 Stat. 252, 42 U.S.C. 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.