

Terms of Reference
Public Involvement Component

ETS/MES 2008 Hybrid and Trolleybus Evaluation Project

BACKGROUND

The City of Edmonton is currently replacing old and obsolete vehicles, including trolleybuses, in the transit fleet. This provides an opportunity to examine the best value for money invested in transit vehicles, as well as an opportunity to consider more environmentally friendly vehicles.

In 2004, City Council directed Edmonton Transit to provide a report in 2008 on what vehicle would be used to replace the existing trolleybus fleet. The trolley bus fleet will be at the end of its design life and needs to be replaced by 2010.

There are a number of environmentally friendly transit vehicles that could be used to replace the trolley buses. The City's Mobile Equipment Services, which maintains the ETS fleet, has contracted the University of Alberta to test diesel/electric hybrid, trolley and the latest clean-diesel technology propulsion systems. Results from this study will assist in determining the future composition of the ETS fleet.

Results from the testing are expected to be available in March with a report going to City Council in May. The report will contain recommendations about the future composition of the ETS fleet.

The public involvement component of the City Council report will be based on the results of the technical tests and will be consistent with the City of Edmonton Public Involvement Policy (<http://www.edmonton.ca/citygov/policy/C513.doc>)

PROJECT REQUIREMENTS/OBJECTIVES

The City of Edmonton values public participation, especially in projects that will have a significant impact on the quality of life of Edmontonians.

Using information from the technical study of the Hybrid/Trolley Bus propulsion systems, the public involvement process will be used to collect the citizens of Edmonton values on the type of vehicle ETS should choose to replace its aging trolley buses. ETS wants to consult with Edmontonians in general via a city-wide telephone survey and input from transit users will be obtained via an intercept survey at transit centres. Relevant stakeholders will be invited to a one-day workshop to provide input.

These activities will be occurring in a tight time frame – technical results are available in March and this input is to be included in a report going to City Council in May.

Objectives

To engage relevant stakeholders and citizens of Edmonton in general in a discussion to ascertain their opinions about the composition of the ETS bus fleet and the type of vehicle to be acquired to replace the trolleys.

SCOPE OF WORK

It is expected that the successful bidder will:

- Prepare a public involvement plan consistent with the City of Edmonton Public Involvement Policy
- Attend biweekly/weekly meetings
- Provide project updates/status reports on a weekly basis or as required using the City's Consultation Manager program
- Develop the survey tool and conduct the city-wide telephone survey.
- Develop the survey tool and conduct the transit centre intercept interviews.
- Prepare for, attend and facilitate a one-day workshop of relevant stakeholders (expected to occur in March).
- Tabulate and summarize results from the two surveys and the workshop.
- Provide 6 copies of the final report plus an electronic version.

The contractor will primarily work off-site and provide their own equipment and space.

Project deliverables and milestones will be based on the work plan submitted by the proposer and should include the following:

Initial meeting with project coordination team

Conduct telephone and intercept surveys.

Delivery of results (including a summary) of telephone and intercept surveys.

Delivery of, preparation and facilitation of one-day workshop.

Delivery of summary of results from the workshop.

All project deliverables and progress reports will be directed to the project manager. All documents will be provided in English, in both paper copy and electronic file.

ANTICIPATED SCHEDULE

Contract Awarded	January/February 2008
Conduct surveys and workshop	March/April 2008
Compile results	March/April 2008
Compile Public Involvement component of report	April 2008
Final report due	April 16, 2008

MANAGEMENT OF THE PROJECT

The contractor will provide a prime resource (project manager) to be the liaison with Edmonton Transit. The contractor's primary contact for this work will be Patricia Dickson

TIMING

The contract period is expected to be for five (4) months commencing in February 2008 and ending May 31, 2008.

MANDATORY REQUIREMENTS

Proposals must clearly meet each of the following mandatory requirements in order to receive further consideration by Edmonton Transit.

Bidders are instructed to reference the specific section/page(s) in the proposal where the related information can be found.

MANDATORY REQUIREMENTS	Section/page in proposal
1. Bidder will provide evidence that it is well versed in public involvement techniques, complying with the City of Edmonton Public Involvement Policy.	
2. Bidder must provide resumes of all key personnel who will perform the work.	
3. Bidder must provide at least two examples of having previously conducted telephone and intercept surveys and organized/facilitated stakeholder workshops within the last three years. (This will also be rated under “Rated requirements”)	
4. Bidder accepts the project requirements as laid out in the “Scope of Work” section of this request.	
5. Firm all-inclusive price quotation that falls within the project budget of \$40,000. A full cost breakdown as per Financial Proposal below must be provided. This information may appear in the Financial Proposal only; no cost information may appear in the Technical Proposal.	
6. Bidders must sign and include with their proposal, the certifications identified below	

RATED REQUIREMENTS

1. Other options presented by the consultant that are within budget and time lines	
2. Provide evidence of bidder’s recent experience in conducting expert and professional telephone and intercept surveys and organizing and facilitating workshops on transit/transportation related issues.	
3. Identify key personnel, their roles/responsibilities and team structure. Demonstrate the team’s experience working together on similar types of projects. Append resumes of key personnel which establish their qualifications and experience.	
4. Describe the proposed approach to overall project management, client liaison and reporting. Demonstrate a track record of delivering projects on schedule and within budget.	
5. Provide financial breakdown for proposal.	

ORAL PRESENTATION

The project team may deem it necessary to invite bidders to make oral presentations of their proposals, and to answer questions necessary to clarify their proposals. Such presentations will be by invitation only and at no cost to the department.

FINANCIAL PROPOSAL

Proposers must submit a firm price for professional fees to complete the project, including the goods and Services Tax (GST) as applicable. The total cost of the project must not exceed \$40,000. Canadian dollars. Proposals costing more will be rejected and will not be evaluated.

A full cost breakdown must accompany each proposal. Cost must be broken down as follows:

Personnel costs:

Writer:

Surveys and reports

Per diem X number of days to write the surveys

Per diem X number of days to compile draft report incorporating results from both surveys and workshop

Per diem X number of days to write final report

Surveyors

Number of surveyors

Per diem X number of days to complete survey

Facilitator

Per diem X number of days of preparatory work

Per diem X facilitation of workshop

AWARDING OF CONTRACT

Only one contract will be awarded.

OWNERSHIP OF INTELLECTUAL PROPERTY

Edmonton Transit has determined that any intellectual property arising from the performance of the Work under the Contract will be the property of the City of Edmonton.

Attached for your reference is the City of Edmonton Professional Services Agreement. Please see www.edmonton.ca/publicinvolvement for information about the City of Edmonton Public Involvement Policy.

CERTIFICATIONS

Your proposal should contain the following statements indicating your agreement to them:

- 1) “We hereby offer to sell and/or supply to the City of Edmonton, for terms and conditions set out herein, the suppliers and/or services listed herein and/or any attached sheets at the price(s) set out therefore.”
- 2) “We hereby certify that the price quoted is not in excess of the lowest price charged anyone else, including our most favoured customer, for like services.”
- 3) “We hereby certify that all the information provided in all the attached resumes (back-ups included), particularly as this information pertains to education achievements, experience and work history, has been verified by us to be true and accurate. Furthermore we hereby certify that, should we be awarded the contract and unless the City of Edmonton is notified in writing to the contrary, the personnel offered in our proposal shall be available to perform the tasks described herein, as and when required the City of Edmonton.”

Signature of Authorized Company Official (re: 1,2,3 above)