

**Request for Proposal ("RFP")**

**for**

**Professional Consulting Management Services for Marketing Transportation  
Options in Chicago**

**Requisition No.: 51985**

**Specification No.: 89262**

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Required for use by:  
CITY OF CHICAGO  
(Department of Transportation)

Issued by:  
CITY OF CHICAGO  
(Department of Procurement Services)

**ONE (1) ORIGINAL AND TWO (2) COPIES  
OF THE RESPONSE TO BE SUBMITTED**

All of the responses must be addressed and returned to:

Jamie L. Rhee, Chief Procurement Officer  
Department of Procurement Services  
City Hall-Bid & Bond-Room 301  
121 N. LaSalle Street  
Chicago, Illinois 60602

**Responses must be received no later than 4:00 p.m. Chicago Time, on  
Monday, August 8, 2011**

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Responses must be submitted in sealed envelope(s) or package(s). The outside of the package or envelope must clearly indicate the name, "**RFP for Professional Consulting Management Services for Marketing Transportation Options in Chicago**" the specification number and the time and the date specified for receipt. The name and address of the Proposer must also be clearly printed on the outside of the envelope(s) or package(s).

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RAHM EMANUEL  
MAYOR

JAMIE L. RHEE  
CHIEF PROCUREMENT OFFICER

Renee Milton, Contract Negotiator (312) 744-8706

**Request for Proposal ("RFP")  
for  
Professional Consulting Management Services for Marketing Transportation  
Options in Chicago**

**Requisition No.: 51985  
Specification No.: 89262**

**GENERAL INVITATION**

The City of Chicago through its Department of Transportation ("CDOT") invites the submission of responses for this **RFP for Professional Consulting Management Services for Marketing Transportation Options in Chicago**. If your firm can demonstrate experience as specified in the Scope of Services, and you are interested in making your services available to the City of Chicago, you are requested to respond to this "Request for Proposal".

One Original and 2 copies of the response must be signed by an authorized representative, enclosed in sealed envelope(s) or package(s), addressed and submitted to the Office of the Chief Procurement Officer, Bid & Bond, Room 301, 121 North LaSalle Street, City Hall, Chicago, Illinois 60602; if hand carried, place in the depository located in the Bid & Bond Room at City Hall, Room 301 by **4:00 P.M., Chicago Time on Monday, August 8, 2011**. Copy 1 of 3 must be marked **ORIGINAL**. The outside of each envelope or package must be labeled:

**RFP for Professional Consulting Management Services for Marketing  
Transportation Options  
In Chicago  
Specification No.: 89262  
4:00PM, Monday, August 8, 2011**

**Important Note:** The City of Chicago accepts no responsibility for the timely delivery of materials, and Proposers are solely responsible for acquiring necessary information, addenda and/or materials.

**CAUTION: LATE SUBMITTALS** - When responses are delivered by mail or messenger to the Chief Procurement Officer, the Proposer is responsible for their delivery **BEFORE** the due date and time. If delivery is delayed beyond the date and hour set for the receipt, responses so delayed will not be considered and will be returned unopened at the expense of the Proposer. Any false statement(s) made by the Proposer(s) will void the response and eliminate the Proposer(s) from further consideration.

For procurement information, contact Renee Milton at (312) 744-8706.  
For Request for Proposal ("RFP") document, call Bid & Bond at (312) 744-9773.

The City of Chicago, Directory of Certified Minority Business Enterprises and Women Business Enterprises and Disadvantaged Business Enterprises is available in the Bid & Bond Room, Room 301, City Hall, 121 North LaSalle Street, Chicago, Illinois 60602 or call (312) 744-9773.

**COLLECT CALLS NOT ACCEPTED**

## **TABLE OF CONTENTS**

	<b>Page No.</b>
I. Introduction and General Information	1
II. Scope of Services	1
III. Submittal Requirements	3
IV. Evaluation Criteria	4
V. Selection Process	4
VI. Submission Due Date and Time	4
VII. Confidentiality	5
Contract Insurance Requirements	7

# **RFP for Professional Consulting Management Services**

**For**

## **Marketing Transportation Options in Chicago**

### **I. INTRODUCTION & GENERAL INFORMATION**

#### **A. INTRODUCTION**

The Chicago Department of Transportation ("CDOT"), seeks Professional Consulting Management Services for Marketing Transportation Options in Chicago ("Services"). The project requires Disadvantaged Business Enterprise ("DBE") participation and will be administered by CDOT's Division of Project Development.

The services contemplated are professional in nature. It is understood that the selected Proposer(s) acting as an individual, partnership, corporation or other legal entity, will be of professional status, licensed to perform in the State of Illinois and licensed for all applicable professional discipline(s) requiring licensing and will be governed by the professional ethics in its relationship to the City. It is also understood that all reports, information, or data prepared or assembled by the Proposer(s) will be confidential in nature and will not be made available to any individual or organization, except the City, without the prior written approval of the City.

The Proposer(s) must be financially solvent and each of its members if a joint venture, its employees, agents or sub-consultants of any tier shall be competent to perform the Services required under this RFP document.

#### **B. GENERAL INFORMATION**

##### **1. Protests**

The Proposer must submit any protests or claims regarding this solicitation to the office of the City's Chief Procurement Officer located at City Hall, Room 403, 121 N. LaSalle Street, Chicago Illinois 60602. A pre-submittal protest must be filed no later than 5 days before the due date of this RFP. A pre-award protest must be filed no later than 10 days after the due date, and a post-award protest must be filed no later than 10 days after the award of the contract.

All protests and claims must set forth the name and address of the protester, the requisition number, the grounds for the protest or claim and the course of action that the protesting party desires that the Chief Procurement Officer take. Copies of the Protest Procedures are available in the Bid & Bond Room.

### **II. SCOPE OF SERVICES**

The Chicago Department of Transportation (CDOT), Division of Project Development, seeks proposals to manage and staff a CDOT initiative to reduce the number of single-occupancy car

trips in five Chicago neighborhoods by increasing the number of trips by public transit, walking, bicycle, carpooling and car sharing. Using an "individualized marketing" methodology, all households in the targeted neighborhoods will be contacted, with personalized information, support and incentives provided to households receptive to changing their travel behaviors.

The individualized marketing approach recognizes that people's reluctance to use environmentally friendly modes of transportation is often due to a lack of information and motivation. Individualized marketing campaigns have been staged in more than 50 cities worldwide and have been found to be a quick and cost-effective way to increase the number of trips by public transit, walking, bicycle, carpooling and car sharing. The goal of this initiative is to reduce the number of participant single-occupancy car trips by a minimum of 10% in the targeted households.

Work is projected to begin in the summer of 2012 and continue until the fall of 2016. One neighborhood would be targeted each year. Outreach is seasonal, starting in the spring or summer and continuing through the fall. Funding for this initiative is from a federal Congestion Mitigation and Air Quality (CMAQ) Improvement grant, with matching funds expected from the Illinois Department of Transportation.

Services include, but may not be limited to:

- Preparing a marketing plan, for CDOT approval prior to staging the first campaign.
- Determining the locations and boundaries of the five Chicago neighborhoods.
- Enlisting the support and participation of local businesses and community groups.
- Direct mail to a minimum of 7,500 residential addresses in each neighborhood with the goal of enlisting a minimum of 750 participating households.
- Providing free kits to participating households, with personalized information to encourage their transportation preference (e.g., stop-specific transit schedules, area walking maps, customized bike maps). Include marketing materials and incentives (e.g., brochures, transit day passes, pedometers, discount coupons for bike shops, notepads, and t-shirts).
- Regularly contacting participating households throughout the campaign with newsletters e-mails and, where appropriate, household visits.
- Maintaining a program database to record all participant contact information, the types of information requested, and any individual contact.
- Conducting telephone surveys of a sample of the participating households and a separate control group before and after each campaign, to quantify the increases in public transit, walking, bicycling, carpooling and car sharing as well as the reduction in the number of single-occupancy car trips and vehicle miles traveled.
- Preparing an evaluation after each campaign, with specific recommendations to improve future campaigns. Identify strategies to ensure that increases in the number of trips by public transit, walking, bicycle, carpooling and car sharing are sustained, with reductions in the number of single-occupancy car trips and vehicle miles traveled maintained.

### III. SUBMITTAL REQUIREMENTS

1. **Downloadable Document.** Proposers that download a proposal from the City of Chicago's website: <http://egov.cityofchicago.org/procurement>, instead of obtaining the hard copy paper proposal from the City of Chicago's Bid and Bond Room, are responsible for checking the City of Chicago's website for clarifications and/or addenda. Failure to obtain clarifications and/or addenda from the City's website will not relieve the Proposer from being bound by any additional terms and/or conditions in the clarification and/or addenda. The city will not be responsible for a bidder's failure to consider additional information contained therein in preparing the proposal.

If the proposal is downloaded from the City of Chicago's website instead of picking it up in a hard copy paper form from the City of Chicago's Bid and Bond Room, the Proposer MUST contact the City of Chicago Department of Procurement Services, Bid and Bond Room at 312-744-9773 or fax a copy of a business card (include email address and Specification Number) to 312-744-5611 to register your company as a document holder for this RFP.

Any harm to the Proposer resulting from such failure to obtain all necessary documents will not be valid grounds for a protest against award(s) made under this RFP.

2. **Format.** Proposals must be prepared on standard 8 ½ x 11 letter size paper. Expensive paper and bindings are discouraged. The City encourages the use of materials containing recycled content.
3. **Cover Letter.** A statement must be signed by an authorized representative of the firm committing to provide the services within the proposed RFP.  
**Section 1-Tab: 1**
4. **Executive summary.** A brief narrative (no more than one page) stating the general understanding of the services to be provided, referencing the firm's and sub-consultants' qualifications and experience on projects of a similar scope and magnitude.  
**Section 2-Tab: 2**
5. **Key Personnel & Organizational Chart.** Identify the project manager and key personnel that will be providing the proposed services. These personnel are expected to have experience with individualized marketing to increase the number of trips by bicycle, walking, public transit, carpooling and car sharing. State their role, areas of responsibility, tasks, and availability. Resumes of the project manager and key personnel must be provided, with specific reference to projects of a similar scope and magnitude. Provide an organizational chart of the firms proposed to work on this project, including DBE firms.  
**Section 3-Tab: 3**
6. **Commitment to Meet DBE Requirement:**  
Provide a plan delineating how the required minimum 25% DBE participation rate would be met. Include the names and qualifications of prospective firms and their proposed contributions to this project.  
**Section 4-Tab: 4**

#### **IV. EVALUATION CRITERIA**

An Evaluation Committee will review the submittals in accordance with the following criteria:

1. Accurate and full understanding of the project scope and required services.
2. The project manager and key personnel's experience with projects of a similar scope and magnitude.
3. The qualifications and availability of the project manager and key personnel.
4. Commitment to meet the DBE requirement.

#### **V. SELECTION PROCESS**

The Request for Proposal will be reviewed by representative(s) from the Department of Transportation. The City may choose to conduct interviews, oral presentations and/or seek clarification from firms that submit proposals. The City may choose to select more than one firm to provide the required services. The final Selection(s) will be based on the proposal(s) considered most advantageous to the City of Chicago. Once determined, CDOT's Commissioner will seek the Chief Procurement Officer's concurrence.

Nothing in this RFP is intended to, nor will be deemed to operate, limit or otherwise constrain the authority, powers, and discretion of the Chief Procurement Officer as set forth in the Municipal Purchasing Act for Cities of 500,000 or More in Population, 65 ILCS 5/8-10-1 et.seq., as amended, and in the Municipal Code of the City of Chicago, as amended.

**Cancellation.** The City reserves the right to terminate this procurement at any stage if the Chief Procurement Officer determines it to be in the best interest of the City. In no event will the City be liable to Proposers for any cost or damages incurred by Proposers or other interested parties in connection with the procurement process, including but not limited to any and all costs of preparing the RFP and participation in any conferences, oral presentation or negotiations.

#### **VI. SUBMITTAL DUE DATE AND TIME**

Proposals must be received by the Chief Procurement Officer at the address shown in the RFP up to the date and time shown here. It is the Proposer's sole responsibility to see that the Proposal is received as stipulated. The Chief Procurement Officer may leave unopened any Proposal received after the date and time set for receipt of the Proposal. The time for the deadline of the Proposals will be determined solely by the clock located in the Bid & Bond Room. Any such unopened Proposals will be returned to the Proposer at the Proposer's expense. Proposers are responsible for the timely delivery of the submittal documents. Failure by a messenger delivery service or printing service to meet the deadline does not relieve the Proposer of the deadline for submittal of the Proposal. Proposal packages must be complete and contain the number of copies shown in the RFP document. The Chief Procurement Officer

reserves the right to reject any Proposal which deviates from the Submittal Requirements. No additional or missing documents will be accepted after the due date and time except as may be requested by the Chief Procurement Officer.

One (1) ORIGINAL and TWO (2) copies of the response are to be submitted in a sealed envelope no later than 4:00 P.M., Chicago Time on **Monday, August 8, 2011**

Jamie L. Rhee, Chief Procurement Officer  
Department of Procurement Services  
Bid & Bond Section  
City Hall-Room 301  
121 N. LaSalle Street  
Chicago, IL 60602

The outside of each envelope or package must be labeled:

**RFP for Professional Consulting Management Services for Marketing Transportation Options in Chicago**

**Specification No.: 89262**  
**Requisition No.: 51985**

**Due 4:00 p.m., Monday, August 8, 2011**

(Name of Proposer)  
Package\_\_of\_\_

(Note: 1 of 3 must contain signatures and be marked **ORIGINAL**)

## **VII. CONFIDENTIALITY**

Responses to this RFP become the exclusive property of the City of Chicago. All documents submitted in response to this RFP may be regarded as public records and may be subject to disclosure. Protection from disclosure generally applies to those elements in each submittal which are marked as "Trade Secret," "Confidential" or "Proprietary." During the course of the submittal evaluation process or the course of the project, the Chief Procurement Officer will accept materials clearly and prominently labeled "Trade Secret," "Confidential" or "Proprietary" by the Proposer or other submitting party. The Chief Procurement Officer will not advise as to the nature of the content of the documents entitled to protection from disclosure, or as to the definition of trade secret, confidential or proprietary information. The Proposer or other submitting party is solely responsible for all such determinations made by it, and for clearly and prominently marking each and every page or sheet of materials with "Trade Secret," "Confidential" or "Proprietary" as it determines to be appropriate. Proposers that indiscriminately so identify all or most of their submittal as protected from disclosure without justification may be considered non-responsive.

The Chief Procurement Officer will endeavor to advise the Proposer of any request for the disclosure of material so marked as "Trade Secret," "Confidential" or "Proprietary," and will give the Proposer or other submitting party the opportunity to seek a court order to protect such



materials from disclosure. If the requested material was submitted by a party other than the Proposer, the Proposer is solely responsible for notifying the submitting party of the request. The City's sole responsibility is to notify the Proposer of the request for disclosure, and the City will not be liable for any damages arising out of such disclosure, whether such disclosure is deemed required by law, by an order of court or administrative agency, or occurs through inadvertence, mistake or negligence on the part of the City of Chicago or its officers, employees, Consultants or subconsultants.

In the event of litigation concerning the disclosure of any material submitted by the Proposer, the Proposer or other submitting party is responsible for prosecuting or defending any action concerning the materials at its sole expense and risk. If the City of Chicago is required to participate in such an action, the Proposer agrees to defend and indemnify the City of Chicago for any and all damages and costs arising in connection with the action (including but not limited to, reasonable attorneys' fees).

## **PROFESSIONAL SERVICES INSURANCE REQUIREMENTS**

Department of Transportation  
Professional Consulting Management Services  
Marketing Transportation Options in Chicago

Consultant must provide and maintain at Consultant's own expense, during the term of the Agreement and time period following expiration if Consultant is required to return and perform any of the Services or Additional Services under this Agreement, the insurance coverage and requirements specified below, insuring all operations related to the Agreement.

### **A. INSURANCE TO BE PROVIDED**

1) **Workers Compensation and Employers Liability**

Workers Compensation Insurance, as prescribed by applicable law, covering all employees who are to provide a service under this Agreement and Employers Liability coverage with limits of not less than \$500,000 each accident, illness or disease.

2) **Commercial General Liability (Primary and Umbrella)**

Commercial General Liability Insurance or equivalent with limits of not less than \$2,000,000 per occurrence for bodily injury, personal injury and property damage liability. Coverages must include the following: All premises and operations, products/completed operations, separation of insureds, defense and contractual liability (not to include Endorsement CG 21 39 or equivalent). The City of Chicago is to be named as an additional insured on a primary, non-contributory basis for any liability arising directly or indirectly from the Services.

Subcontractors performing Services for Consultant must maintain limits of not less than \$1,000,000 with the same terms in this subsection.

3) **Automobile Liability (Primary and Umbrella)**

When any motor vehicles (owned, non-owned and hired) are used in connection with Services to be performed, Consultant must provide Automobile Liability Insurance with limits of not less than \$2,000,000 per occurrence for bodily injury and property damage. The City of Chicago is to be named as an additional insured on a primary, non-contributory basis.

Subcontractors performing Services for Consultant must maintain limits of not less than \$1,000,000 with the same terms in this subsection.

4) **Professional Liability**

When any professional consultants perform work in connection with this Agreement, Professional Liability Insurance covering acts, errors, or omissions must be maintained with limits of not less than \$2,000,000. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede, start of work on the Agreement. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years.

Subcontractors performing Services for Consultant must maintain limits of not less than \$1,000,000 with the same terms in this subsection.

5) Valuable Papers

When any media, data, surveys, records, reports and any other documents are produced or used under this Agreement, Valuable Papers Insurance must be maintained in an amount to insure against any loss whatsoever, and must have limits sufficient to pay for the re-creation and reconstruction of such records.

6) Property

Consultant is responsible for all loss or damage to City property at full replacement cost.

Consultant is responsible for all loss or damage to personal property (including materials, equipment, tools and supplies) owned, rented or used by Consultant

**B. ADDITIONAL REQUIREMENTS**

Consultant must furnish the City of Chicago, Department of Procurement Services, City Hall, Room 403, 121 North LaSalle Street 60602, original Certificates of Insurance, or such similar evidence, to be in force on the date of this Agreement, and Renewal Certificates of Insurance, or such similar evidence, if the coverages have an expiration or renewal date occurring during the term of this Agreement. Consultant must submit evidence of insurance on the City of Chicago Insurance Certificate Form (copy attached as Exhibit-) or equivalent prior to execution of Agreement. The receipt of any certificate does not constitute agreement by the City that the insurance requirements in the Agreement have been fully met or that the insurance policies indicated on the certificate are in compliance with all Agreement requirements. The failure of the City to obtain certificates or other insurance evidence from Consultant is not a waiver by the City of any requirements for the Consultant to obtain and maintain the specified coverages. Consultant must advise all insurers of the Agreement provisions regarding insurance. Non-conforming insurance does not relieve Consultant of the obligation to provide insurance as specified in this Agreement. Nonfulfillment of the insurance conditions may constitute a violation of the Agreement, and the City retains the right to suspend this Agreement until proper evidence of insurance is provided, or the Agreement may be terminated.

The insurance must provide for 60 days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed.

Any deductibles or self-insured retentions on referenced insurance coverages must be borne by Consultant.

Consultant hereby waives and agrees to require their insurers to waive their rights of subrogation against the City of Chicago, its employees, elected officials, agents or representatives.

The coverages and limits furnished by Consultant in no way limit the Consultant's liabilities and responsibilities specified within the Agreement or by law.

Any insurance or self-insurance programs maintained by the City of Chicago do not contribute with insurance provided by Consultant under this Agreement.

The required insurance to be carried is not limited by any limitations expressed in the indemnification language in this Agreement or any limitation placed on the indemnity in this Agreement given as a matter of law.

If Consultant is a joint venture or limited liability company, the insurance policies must name the joint venture or limited liability company as a named insured.

Consultant must require all Subcontractors to provide the insurance required in this Agreement, or Consultant may provide the coverages for Subcontractors. All Subcontractors are subject to the same insurance requirements of Consultant unless otherwise specified in this Agreement.

If Consultant or Subcontractor desire additional coverages, the party desiring the additional coverages is responsible for the acquisition and cost.

Notwithstanding any provision in the Agreement to the contrary, the City of Chicago Risk Management Department maintains the right to modify, delete, alter or change these requirements.