



## **REQUEST FOR QUALIFICATIONS**

### **Comprehensive Safety Action Plan**

*"Safety is Everyone's Business"*

### **Data Analysis and Plan Development**

**RFQ# CRTPO SS4A 1**

c/o City of Charlotte

**Date Issued:**

May 13, 2025

## TABLE OF CONTENTS

<b>1</b>	<b>REQUEST FOR QUALIFICATIONS (RFQ) INSTRUCTIONS.....</b>	<b>3</b>
1.1	PUBLIC NOTICE .....	3
1.2	PROJECT OVERVIEW .....	3
1.3	RFQ SCHEDULE OF EVENTS AND SOQ SUBMISSION .....	4
1.5	EVALUATION CRITERIA AND PROCESS.....	4
1.6	SOQ FORMAT.....	5
1.7	SOQ CONTENT .....	5
<b>2</b>	<b>REPRESENTATIONS, CONDITIONS, AND OTHER REQUIREMENTS.....</b>	<b>7</b>
2.1	COMMUNICATIONS .....	7
2.2	DUTIES AND OBLIGATIONS OF FIRMS IN THE RFQ PROCESS.....	7
2.3	ADDENDA.....	7
2.4	NO COLLUSION, BRIBERY, LOBBYING OR CONFLICT OF INTEREST .....	7
2.5	PUBLIC RECORDS .....	7
2.6	COST OF SOQ PREPARATION .....	8
2.7	ADVERTISING .....	8
2.8	VENDOR REGISTRATION WITH THE CITY OF CHARLOTTE .....	8
2.9	REGISTRATION WITH SECRETARY OF STATE FOR NORTH CAROLINA; LICENSED ENGINEERS/ARCHITECTS .....	8
2.10	FINANCIAL CAPACITY; INSURANCE REQUIREMENTS.....	9
2.11	OWNERSHIP OF WORK PRODUCTS .....	9
2.12	CITY RIGHTS AND RESERVATIONS .....	9
2.13	CONTRACT .....	9
2.14	EQUAL OPPORTUNITY .....	9
2.15	E-VERIFY CERTIFICATION .....	9
2.16	FAMILIARITY AND COMPLIANCE WITH LAWS AND ORDINANCES.....	10
2.17	INSURANCE REQUIREMENTS.....	10
2.18	BACKGROUND CHECKS.....	11
2.19	NORTH CAROLINA PROHIBITION ON CONTRACTS WITH COMPANIES THAT INVEST IN IRAN OR BOYCOTT ISRAEL .....	11
2.20	CHARLOTTE BUSINESS INCLUSION (CBI) .....	11
<b>3</b>	<b>FEDERAL CONTRACT TERMS AND CONDITIONS.....</b>	<b>13</b>
	<b>EXHIBIT A – SCOPE OF WORK.....</b>	<b>16</b>
	<b>FORMS.....</b>	<b>30</b>

# **1 REQUEST FOR QUALIFICATIONS (RFQ) INSTRUCTIONS**

## **1.1 Public Notice**

The Charlotte Regional Transportation Planning Organization (CRTPO), under the City of Charlotte (City) as the lead agency, is soliciting Statements of Qualifications (SOQs) from firms to provide data analysis and plan development services (Services) for the CRTPO's Comprehensive Safety Action Plan (CSAP), titled "Safety is Everyone's Business" project (Project). The City is seeking firms whose combination of experience and expertise will provide timely, professional services to the City.

***The CRTPO was awarded \$3.15 million from the United States Department of Transportation (USDOT) Safe Streets and Roads for All (SS4A) discretionary grant in September 2024. As of this solicitation publication in May 2025, the federal grant agreement has not been executed. Please note that as a result, the funds awarded to this project are not currently accessible by the CRTPO but are anticipated by fall 2025, concurrent with the procurement schedule. No award will be made under this solicitation until funds are available.***

The City is seeking firms whose combination of experience and expertise will provide timely, professional services to the CRTPO.

A firm will not be considered unless the following minimum requirements are met:

1. A firm must be appropriately registered with the Office of the Secretary of State of North Carolina and
2. A firm must be licensed by the North Carolina Board of Examiners for Engineers and Surveyors and authorized to practice engineering under the provisions of Chapters 89C and 55B of the General Statutes of North Carolina.

All questions about this RFQ must be directed to the City's designated contact person. Attempts to discuss this Project with staff other than the contact person noted below may lead to disqualification of your firm.

Jennifer Stafford  
Charlotte Regional Transportation Planning Organization  
City of Charlotte  
(704) 336-3369 or Jennifer.stafford@charlottenc.gov

## **1.2 Project Overview**

The CRTPO is the federally designated Metropolitan Planning Organization (MPO) for the Charlotte Urban Area, charged with coordinating and facilitating transportation planning and programming with member jurisdictions in Iredell, Mecklenburg, and the urban portion of Union counties. The CRTPO is embedded within the City of Charlotte's Planning, Design & Development Department and is governed by a federally mandated transportation policy board comprised of representatives from local, state, and federal government, transit agencies, and other stakeholders.

The CRTPO was awarded funds from the USDOT SS4A discretionary grant program to engage its 24 member jurisdictions and create a CSAP to develop new safety data tools and insights, link

local priorities and existing safety efforts, and establish a regional vision for reducing serious traffic injuries and fatalities throughout the Charlotte urban area.

The purpose of this solicitation is to retain a multidisciplinary firm to conduct transportation safety data analysis, develop associated data tools, deliver a regional CSAP for the CRTPO planning area, and individual new or updated Safety Action Plans and technical support for each of the CRTPO member jurisdictions, as well as any other innovative and best-practice safety strategies proposed by a prospective consultant.

This solicitation is a companion to a **Public Education & Outreach** request for proposals (RFP) focused on stakeholder outreach and engagement, due to be released in mid-to-late 2025 (**RFP# CRTPO SS4A 2**).

*Please see Exhibit A for a complete Scope of Work.*

### 1.3 **RFQ Schedule of Events and SOQ Submission**

The anticipated schedule of events is provided below. The City reserves the right to adjust the schedule and to add/remove specific events to meet the unique needs of this Project, including any agreement modifications or delays by the USDOT.

Advertisement of RFQ:	May 13, 2025
Pre-Submittal Meeting:	June 3, 2025 at 1 PM
Deadline for Questions:	June 10, 2025 at 5 PM
<b>DUE DATE &amp; TIME FOR SUBMITTALS:</b>	<b>June 18, 2025, at 2 PM (EST)</b>
Evaluation Meeting(s):	July 2025
Interviews:	August, 2025
Selection Announcement:	September 2025

A non-mandatory **REMOTE** pre-submittal meeting will be held on June 3, 2025 to review the RFQ and answer questions regarding the Services. No in-person meeting will be held. Attendance at the pre-submittal meeting is not mandatory but is highly recommended.

In-person interviews are expected. The oral interview will be conducted by a panel comprised of selection committee members from the CRTPO planning area. Proposers may only ask questions intended to clarify the questions they are being asked to respond to. Each Proposer's time slot for oral interviews will be determined randomly. Proposers who are selected shall make every effort to attend. If representatives of the City have trouble on the part of any Proposer in scheduling a time for the oral interview, it may result in disqualification from further consideration.

### 1.4 **Proposal Submission**

Submit responses by emailing a PDF (PDF format only) to [Jennifer.stafford@charlottenc.gov](mailto:Jennifer.stafford@charlottenc.gov). Please request a delivery and read receipts. Sometimes, there is a delay in emailing attachments to the City, and it is not responsible if your electronic submittals do not reach us by the deadline. Late submittals will not be accepted. Please consider sending your submittal at least a day before the deadline. When your submittal has been received, you will receive a confirmation email.

### 1.5 **Evaluation Criteria and Process**

Firms shall meet the following minimum qualifications:

- Firms must be properly registered with the Office of the Secretary of State of North Carolina (as applicable)
- Firms must be licensed by the North Carolina Board of Examiners for Engineers & Surveyors

SOQ evaluation criteria will consist of the following:

- Qualifications and relevant experience of firm and key team members in providing similar services and projects (40%)
- Proposed and innovation (30%)
- Project understanding, methodology, and approach (20%)
- Multi-jurisdictional and federally funded project experience (10%)

The selection committee is responsible for making recommendations based on the above evaluation criteria. The committee will focus on identifying the relative strengths, weaknesses, deficiencies, and risks associated with each SOQ. The City reserves the right to obtain clarification or additional information from any firms regarding its SOQ.

The City reserves the sole right to select the most qualified consultant(s) based on the best overall SOQ(s) that are most advantageous to the City. Firms that submit SOQs will be notified of the selection results. Final approval of any selected firm is subject to the approval of City Council and/or City officials.

## **1.6 SOQ Format**

SOQs are limited to a maximum of 20 numbered pages. Type size should be no smaller than 11 points for narrative sections but may be reduced for captions, footnotes, etc. while maintaining legibility. Non-conforming submissions may be removed from consideration at the sole discretion of the City. Firms must submit these materials in PDF format.

## **1.7 SOQ Content**

SOQ packages should be arranged as follows:

### **Chapter 1: Proposal Summary (2 pages)**

Please discuss the highlights, key features, distinguishing points of your proposal, as well as the unique advantages of your firm.

### **Chapter 2: Firm's Profile (3 pages)**

Describe your firm/team. Include a description of your firm's size and structure with sub-consultants. Provide an organizational chart and contact information for key personnel. Identify the Project Manager who will be empowered to make decisions for and act on behalf of the firm. Identify any member of the team who is certified as a minority, women, or small business firm.

This chapter may include information regarding any relationships with firms and/or individuals proposed for this Project. List any firms with Charlotte Business INclusion (CBI) designations.

Identify pending claims, disputes, and/or litigation and any that occurred within the past five (5) years involving your firm or any of your proposed sub-consultants.

### **Chapter 3: Qualifications (3 pages)**

List a maximum of 5 similar projects, either currently in progress or having been completed in the past three years.

- List only projects involving the key team members or subcontractors proposed for this project.
- List projects in date order with the newest projects listed first and include the following:
  - Brief project description
  - Project managers and other key team members
  - Owner's phone number and email
  - Contract dollar amount and total time involved
  - Did you complete the work on schedule (without amendments to the contract)?

### **Chapter 4: Proposed Innovations (4 pages)**

The Proposer may also suggest technical or procedural innovations that have been used successfully on other engagements and may provide the CRTPO with a better CSAP. In this chapter, discuss any ideas, innovative approaches, or specific new concepts included in the proposal that would benefit the CRTPO's and their members.

### **Chapter 5: Project Understanding, Methodology, and Approach (4 pages)**

This chapter should present a well-conceived project plan. Include a full description of major tasks and subtasks.

Succinctly describe the proposed approach for addressing the required Services and the firm's ability to meet the CRTPO's schedule, outlining the approach to provide the Services to complete the Project. Describe any support needed from CRTPO staff to execute the Services.

### **Chapter 6: Multi-jurisdictional Project Experience (4 pages)**

Describe the firm's recent experience with the following:

1. Qualitative interviews and information gathering across diverse stakeholders who may have opposing interests
2. Gathering information from diverse sources, both multidisciplinary and across geographic areas – local, state, academic, etc.
3. Use of diverse and cutting-edge research methods, including automated data collection and maintenance and modeling
4. Collaboration with program staff and others throughout Project processes
5. Presenting on topics of transportation safety to city and town boards and councils

### **Appendix**

Resumes may be submitted for key team members (6 pages maximum and not counted in the overall proposal page limit). Submit the required forms.

Failure to submit forms may be grounds for rejection of submission at the sole discretion of the City.

## **2 REPRESENTATIONS, CONDITIONS, AND OTHER REQUIREMENTS**

### **2.1 Communications**

All communication of any nature with respect to this RFQ shall be addressed to the Contracts Administrator identified in this RFQ. With the exception of communications with the Contracts Administrator for this RFQ, firms and their staffs are prohibited from communicating with elected City and CRTPO officials, City and CRTPO members staff and any evaluation committee member regarding this RFQ or SOQ from the time the RFQ is released until the selection results are publicly announced. These restrictions include "thank you" letters, phone calls, emails, and any contact that results in the direct or indirect discussion of this RFQ and/or the SOQ submitted by the firm/team. Violation of this provision may lead to the firm's SOQ being disqualified from consideration.

### **2.2 Duties and Obligations of Firms in the RFQ Process**

Interested firms are expected to fully inform themselves of all conditions, requirements, and specifications of this RFQ before submitting a proposal. Firms must perform their own evaluation and due diligence verification of all information and data provided by the City. The City makes no representations or warranties regarding any information or data provided by the City. Firms are expected to promptly notify the City in writing to report any ambiguity, inconsistency or error in this RFQ. Failure to notify the City accordingly will constitute a waiver of claim of ambiguity, inconsistency or error.

### **2.3 Addenda**

To clarify or modify any part of this RFQ, addenda may be issued and posted on [the City's Procurement Portal](#). Any requests for additional information or clarifications should be submitted through the **Vendor Discussion** section on the Procurement Portal or via email by the "Deadline for Questions" stated in **Section 1.3 – RFQ Schedule of Events**.

### **2.4 No Collusion, Bribery, Lobbying or Conflict of Interest**

By responding to this RFQ, the firm shall be deemed to have represented and warranted that its SOQ submittal is not made in connection with any competing firm submitting a separate response to this RFQ and is fair and without collusion or fraud. Furthermore, the firm certifies that neither it, any of its affiliates or sub-consultants, nor any of the foregoing employees has bribed, or attempted to bribe, an officer or employee of the City in connection with this RFQ.

### **2.5 Public Records**

Upon receipt by the City, each SOQ becomes the property of the City and is considered a public record except for material that qualifies as "Trade Secret" information under North Carolina General Statute 66-152 et seq. SOQs will be reviewed by the City's evaluation committee, as well as other City staff and members of the general public who submit public record requests after a selection result has been announced to the public. To properly designate material as a trade secret under these circumstances, each firm must take the following precautions: (a) any trade secrets submitted by the firm must specifically and clearly be identified by separating them from the rest of the proposal and marked as "Trade Secret – Confidential and Proprietary Information – Do Not Disclose Except for the Purpose of Evaluating this SOQ" on each page of the trade secret

and (b) the document(s) containing the trade secret designations must be uploaded separately in the City's Procurement Portal.

In submitting an SOQ, each firm agrees that the City may reveal any trade secret materials contained in such response to all City staff and City officials involved in the evaluation process and to any outside consultant or other third parties who serve on the evaluation committee or who are hired by the City to assist in the evaluation process. Furthermore, each firm agrees to indemnify and hold harmless the City and each of its officers, employees and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that the firm has designated as a trade secret. Any firm that designates its entire SOQ as a trade secret may be disqualified from consideration.

## **2.6 Cost of SOQ Preparation**

The City shall not be liable for any expenses incurred by any firm responding to this RFQ. Firms submitting a SOQ in response to this RFQ agree that the materials and submittals are prepared at the firm's own expense with the express understanding that the firm cannot make any claims whatsoever for reimbursement from the City for the costs and expenses associated with preparing and submitting a SOQ. Each firm shall hold the City harmless and free from any and all liability, costs, claims, or expenses incurred by, or on behalf of, any person or firm responding to this RFQ.

## **2.7 Advertising**

In submitting a SOQ, the firm agrees not to use the results therefrom as part of any commercial advertising without prior written approval of the City of Charlotte.

## **2.8 Vendor Registration with the City of Charlotte**

The selected firm and subcontractors must be registered in the City's Vendor Registration System in order to receive payment for services and/or supplies provided under any City contract.

## **2.9 Registration with Secretary of State for North Carolina; Licensed Engineers/Architects**

Any firm wishing to be considered for the Services must be properly registered with the Office of the Secretary of State and with either the North Carolina Board of Registration for Professional Engineers and Land Surveyors or the North Carolina Board of Architecture, as applicable, at the time of submission of the SOQ. The firm(s) selected under this RFQ will be responsible for providing all professional, technical, managerial, and administrative staff with the appropriate skills and qualifications to perform the required Services. The person in charge of the work must be a registered professional in the State of North Carolina and must have good ethical and professional standing.

Any firm proposing to use corporate subsidiaries or subcontractors must include a statement that these companies are properly registered with the NC Board of Registration for Professional Engineers and Land Surveyors or the North Carolina Board of Architecture, as applicable. The prime firm will be responsible for verifying the registration of any corporate subsidiary or subcontractor before submitting a SOQ. For detailed licensing requirements, refer to North Carolina General Statutes (<http://www.ncbels.org/rulesandlaws.html>).



**2.10 Financial Capacity; Insurance Requirements**

The selected firm must have the financial capacity to undertake the work and assume associated liability.

**2.11 Ownership of Work Products**

The City shall have exclusive ownership of all intellectual property rights in all designs, plans and specifications, documents and other work products prepared by, for, or under the direction of the selected firm pursuant to any contract under this RFQ (collectively, the "Intellectual Property"), including without limitation the right to copy, use, disclose, distribute, and make derivations of the Intellectual Property for any purpose or to assign such rights to any third party. The Intellectual Property shall be prepared in the City's name and shall be the sole and exclusive property of the City, whether or not the work contemplated therein is performed. The City will grant the firm a royalty-free, non-exclusive license to use and copy the Intellectual Property to the extent necessary to perform the contract.

**2.12 City Rights and Reservations**

The City expects to select one or more firms but reserves the right to request substitutions of any key team member, including staff and subcontractors. The City reserves the right to contact any firm/team for any additional information, including but not limited to experience, qualifications, abilities, equipment, facilities, and financial standing. The City reserves the right to modify any part of this RFQ as issued with an addendum. The City, at its sole discretion, reserves the right to reject any or all responses to the RFQ, to cancel the RFQ, to re-advertise for new RFQ responses either with identical or revised specifications, or to accept any RFQ response, in whole or part, deemed to be in the best interest of the City. The City reserves the right to waive technicalities and informalities.

A response to this RFQ shall not be construed as a contract nor indicate a commitment of any kind. The City reserves the sole right to award a contract or contracts to the most qualified firm(s) on the basis of the best overall SOQ that is most advantageous to the City. The City also reserves the right to make multiple awards based on experience and qualifications if it is deemed in the City's best interest.

**2.13 Contract**

The contents of this RFQ and all provisions of the successful SOQ deemed responsive by the City may be incorporated, either in whole or in part, into a contract and become legally binding when approved and executed by both parties. Contents of the contract may contain changes from the City's perspective as a result of the RFQ process and SOQ(s) received. The final negotiated contract may include the scope of work as outlined in this RFQ, along with the successful firm's submittal and any additions or deletions made at the discretion of the City as a result of the RFQ process.

**2.14 Equal Opportunity**

The firm will ensure that employees and applicants for employment are not unfairly discriminated against because of their race, color, religion, sex, national origin, disability or veteran status.

**2.15 E-Verify Certification**

The firm shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes and shall require each of its subcontractors to do so as well.

## **2.16 Familiarity and Compliance with Laws and Ordinances**

The firm shall make itself aware of, comply with, and cause each of its subcontractors to comply with all applicable federal, state, and local laws and regulations, including obtaining all required permits and licenses.

## **2.17 Insurance Requirements**

The consultant selected under this RFQ will be required, during the life of the contract with the City, to purchase and maintain the following insurance with a firm acceptable to the City and authorized to do business with the State of North Carolina:

- **Automobile Liability Insurance:** Bodily injury and property damage liability covering all owned, non-owned, and hired automobiles for limits of not less than \$1,000,000 bodily injury each person, each accident and \$1,000,000 property damage, or \$1,000,000 combined single limit each occurrence/aggregate.
- **Comprehensive General Liability:** Bodily injury and property damage liability shall protect the consultant and any subcontractor performing work under the agreement from claims of bodily injury or property damage that arise from the operation of this agreement whether such operations are performed by the consultant, any subcontractor, or any person directly or indirectly employed by either. The amounts of such insurance shall not be less than \$1,000,000 bodily injury each occurrence/aggregate and \$1,000,000 property damage each occurrence/aggregate or \$1,000,000 bodily injury and property damage combined single limits each occurrence/aggregate. This insurance shall include coverage for products/completed operation, personal injury liability, and contractual liability assumed under the indemnity provision of the agreement.
- **Worker's Compensation and Occupation Disease Insurance:** In conformance with State law, in an amount of \$100,000 each accident and disease for each employee, and \$500,000 disease policy limit providing coverage for employees and owners.
- **Professional Liability Insurance:** In an amount of not less than \$1,000,000 each claim and \$1,000,000 aggregate.

The City shall be exempt from, and in no way liable for, any sums of money that may represent a deductible in any insurance policy. The payment of such deductible shall be the sole responsibility of the Developer and/or sub-consultant providing such insurance.

The City shall be named as additional insured under the commercial general liability insurance for operations and services rendered under a contract. At the time of execution of the contract, certificates of all required insurance shall be furnished to the City and shall contain the provision that the City will be given thirty (30) days written notice of any intent to amend or terminate by either the insured or the insuring firm.

## **2.18 Background Checks**

Certain City facilities require a background check of all firm employees before they are allowed into the facility. The Charlotte-Mecklenburg Police Department will conduct these background checks as needed.

## **2.19 North Carolina Prohibition on Contracts with Companies that Invest in Iran or Boycott Israel**

The Consultant certifies that: (i) it is not identified on the Final Divestment List or any other list of prohibited investments created by the NC State Treasurer pursuant to N.C.G.S. 147-86.58 (collectively, the "Treasurer's IDA List"); (ii) it has not been designated by the NC State Treasurer pursuant to N.C.G.S. 147-86.81 as a consultant engaged in the boycott of Israel (such designation being referred to as the "Treasurer's IB List"); and (iii) it will not take any action causing it to appear on the Treasurer's IDA List or the Treasurer's IB List during the term of this Contract. In signing this Contract consultant further agrees, as an independent obligation, separate and apart from this Contract, to reimburse the City for any and all damages, costs and attorneys' fees incurred by the City in connection with any claim that this Contract or any part thereof is void due to consultant appearing on the Treasurer's IDA List or the Treasurer's IB List at any time before or during the term of this Contract.

## **2.20 Charlotte Business INclusion (CBI)**

Pursuant to Charlotte City Council's adoption of the CBI Policy, the CBI program seeks to enhance competition and participation of Minority-owned, Women-owned, and Small Business Enterprises (MWSBEs) in City contracting. To accomplish this, the City has examined its procurements and set specific MWSBE participation goals on a contract-by-contract basis. In addition, CBI makes a concerted effort to expand its certified MWSBE vendor pool and assist City-certified firms in growing, enhancing, and developing their businesses. CBI currently offers numerous development programs that support certified businesses in organizational training, strategic development, and networking opportunities.

The CBI Policy and CBI Manual are posted online here: [www.charlottebusinessinclusion.com](http://www.charlottebusinessinclusion.com).

To determine whether disparities exist in City contracting based on race, gender or other factors, and also to measure the effectiveness of the City's CBI Program, the City tracks the utilization of subconsultants and suppliers on certain City contracts based on race, gender, small business status, and other factors. For analysis purposes, it is important that the City obtain this data not only for minority-owned, women-owned, and small business suppliers and subconsultants, but also for other subconsultants and suppliers. As a condition for receiving payments under this Contract, the Proposer agrees to submit any payment record into InclusionCLT, or any subsequent system designated by the City, detailing the amounts paid by the Consultant to all subconsultants and suppliers receiving payment in connection with this Contract.

The City intends to negotiate an MWSBE goal with the selected firm. The City would like the firm to list proposed certified companies it intends to utilize. Failure to submit this form with the proposal shall render the Proposal non-responsive.

In addition to the MWSBE participation plan, we recommend that the firm provide a mentoring plan for the MWSBE during the Project's life. The firm would provide documentation on a quarterly basis during the Project on the progress of the mentor/protégé partnership.

City-certified MWSBE firms can be found in the City's InclusionCLT system:

<https://charlotte.diversitycompliance.com/>

[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]

### **3 FEDERAL CONTRACT TERMS AND CONDITIONS**

This exhibit must be included in all solicitations, including those where federal funds may be used to fund purchases of products, services, or construction solicited by this solicitation document. This Exhibit is attached and will be incorporated into the contract between the City and the selected consultant. Capitalized terms not defined in this Exhibit shall have the meanings assigned to such terms in the contract. In the event of a conflict between this Exhibit and the terms of the main body of the contract or any other exhibit or appendix, the terms of this Exhibit shall govern.

Contracts resulting from this solicitation process will be for a fixed price and task orders may be issued with federal funds. The provisions required under 2 CFR §200.326 and as provided under 2 CFR Part 200, Appendix II, among other provisions, are incorporated herein by reference.

- 3.1 **Debarment and Suspension.** The firm represents and warrants that, as of the Effective Date of the Contract, neither the firm nor any subcontractor or sub-consultant performing work under this contract (at any tier) is included on the federally debarred bidder's list listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." If at any point during the Contract term the firm or any subcontractor or sub-consultant performing work at any tier is included on the federally debarred bidder's list, the firm shall notify the City immediately.
- 3.2 **Record Retention.** The firm certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. The firm further certifies that it will retain all records as required by 2 CFR § 200.333 for a period of three (3) years after it receives City notice that the City has submitted final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.
- 3.3 **Procurement of Recovered Materials.** The firm represents and warrants that in its performance under the Contract, the firm shall comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- 3.4 **Clean Air Act and Federal Water Pollution Control Act.** The firm agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

- 3.5 **Energy Efficiency.** The firm certifies that the firm will be in compliance with mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).
- 3.6 **Byrd Anti-Lobbying Amendment (31 U.S.C. 1352).** The firm certifies that:
- 3.6.1. No federal appropriated funds have been paid or will be paid, by or on behalf of the firm, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal Loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of and Federal contract, grant, loan, or cooperative agreement.
  - 3.6.2. If any funds other than federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the firm shall complete and submit Standard Form "Disclosure Form to Report Lobbying," in accordance with its instructions [as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96)].
  - 3.6.3. The firm shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.
  - 3.6.4. The firm's completed "Byrd Anti-Lobbying Certification" Form is incorporated herein.
- 3.7 **Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).** If the Contract is in excess of \$100,000 and involves the employment of mechanics or laborers, the firm must comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, the firm is required to compute the wages of every mechanic and laborer on the basis of a standard work week of forty (40) hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of forty (40) hours in the work week. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or purchases of transportation or transmission of intelligence.

- 3.8 **Right to Inventions.** If the federal award is a “funding agreement” under 37 CFR 401.2 and the City wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment of performance or experimental, developmental or research work thereunder, the City must comply with 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
- 3.9 **DHS Seal, Logo, and Flags.** The firm shall not use the Department of Homeland Security (“DHS”) seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval.
- 3.10 The Federal Government is not a party to this Contract and is not subject to any obligations or liabilities to the City, firm, or any other party pertaining to any matter resulting from the Contract.

## Exhibit A – SCOPE OF WORK



## Data Analysis and Plan Development RFQ

### Scope of Work

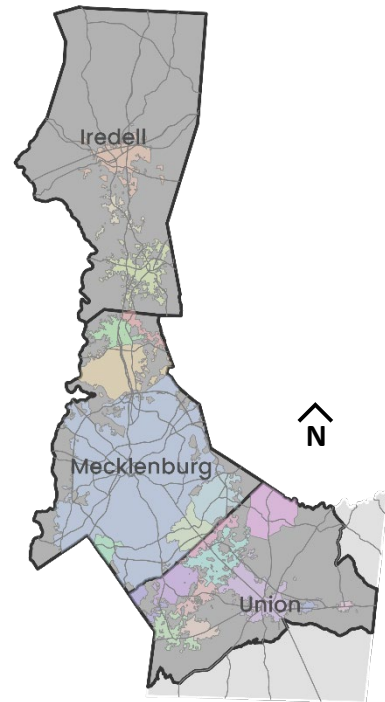


## Project Background, Objective, and Location

The CRTPO is the federally designated Metropolitan Planning Organization (MPO) for the Charlotte Urban Area, charged with transportation planning and programming with member jurisdictions in Iredell, Mecklenburg, and the urban portion of Union counties. The CRTPO is embedded within the City of Charlotte's Planning, Design & Development Department and is governed by a federally mandated transportation policy board comprised of representatives from local, state, and federal government, transit agencies, and other stakeholders.

The CRTPO's SS4A grant application, titled "Safety is Everyone's Business", will engage its 24 member jurisdictions to create a Comprehensive Safety Action Plan (CSAP) to link local priorities and existing safety efforts, and establish a regional vision for achieving a reduction of serious traffic injuries and fatalities throughout roadways within the planning area.

The purpose of this solicitation is to retain a multidisciplinary firm to conduct transportation safety data analyses, develop associated data tools, deliver a regional Comprehensive Safety Action plan for the CRTPO planning area, and individual new or updated Safety Action Plans and technical support for each of the CRTPO's member jurisdictions, as well as any other innovative safety strategies proposed by a prospective consultant. This solicitation is companion to a *Public Education & Outreach* request for proposals (RFP) focused on stakeholder outreach and engagement.



## Recent Transportation Planning Initiatives

There are numerous transportation planning efforts within the CRTPO planning area. These plans include, but are not limited to:

### Transportation Safety & Mobility Plans

- Local Vision Zero/Safety Action Plans:
  - Adopted
    - a) City of Charlotte
    - b) Town of Davidson
    - c) Town of Matthews
    - d) Town of Mooresville
  - Underway
    - a) Town of Huntersville
    - b) Village of Marvin
    - c) City of Monroe
    - d) Town of Waxhaw
- 2030 Transit Corridor System Plan, *CATS*
- Better Bus Study, *CATS*
- CONNECT Beyond, *Centralina Regional Council*
- Critical Intersection Analysis, *Union County*
- Indian Trail Transportation Master Plan, *Town of Indian Trail*

- Iredell County Transportation Master Plan, *Iredell County*
- Mooresville Mobility Plan, *Town of Mooresville*
- Regional TDM Plan, *Centralina Regional Council*

#### **MPO Long Range Planning Processes**

- Metropolitan Transportation Plan (MTP), *CRTPO*
- Comprehensive Transportation Plan (CTP), *CRTPO*
- Transportation Improvement Program (TIP), *CRTPO*
- State Transportation Improvement Program / Prioritization, *NCDOT*

#### **CRTPO-Led Planning Initiatives**

- Beyond 77 Implementation
- Bicycle Suitability Mapping Update
- Seam Trail Advancement Study

## **Project Tasks**

### **Task 1: Project Management & Administration**

The selected *Data Analysis and Plan Development* Consultant (herein referred to as “Consultant”) shall deliver the following project management deliverables to the CRTPO CSAP Project Management Team (herein referred to as “Staff”) to ensure the organization’s ability to track and report progress internally and to stakeholders. Additional responsibilities may be sought outside of these required elements as necessary.

#### **Task 1.1: Project Management**

The Consultant is expected to meet with Staff on a bi-weekly basis, or as otherwise determined by Staff, to develop a project schedule, review progress towards key milestones, review the project budget, and advance action items. Support with developing content for Staff to present to the CRTPO Board and/or Technical Coordinating Committee (TCC), including written memorandums and presentation decks, may be expected from the Consultant.

Concurrent with *Task 3.5*, the Consultant will be expected to prepare project management updates with jurisdiction planning staff and their elected boards regarding local Safety Action Plan development and technical assistance. These meetings may be expected a minimum of three times per member. CRTPO staff are to be included in all communications and meeting invitations.

Additional meeting support will be discussed with Staff as needed.

#### **Deliverables:**

- Project schedule
- Project budget
- Project management meeting agendas, presentations, and minutes
- TCC and Board update materials (up to six occasions throughout the study)
- Local jurisdiction project management meeting agendas, presentations, and minutes

### **Task 1.2: Project Performance and Invoicing**

To ensure CRTPO and FHWA program expectations are clear and upheld throughout the study, the Consultant is to abide by and report on project performance measures set by Staff. The Consultant is expected to submit a quarterly report detailing project performance beginning the first week of each quarter. Quarterly reports will contribute to a *Final Grant Performance Report* scoped per Task 3.8.

Quarterly reports may include, at minimum:

- Summary of work accomplished, anticipated
- Project scope challenges
- Budgeted task amount remaining

Invoices are to be delivered to the CRTPO Project Manager to ensure timely grant reimbursement throughout the study.

#### **Deliverables:**

- Project performance reports, quarterly
- Consultant invoices

### **Task 1.3: Transportation Safety Task Force Facilitation**

The Consultant, in collaboration with Staff, is expected to support with facilitation of a core steering committee (herein known as the “Transportation Safety Task Force”, or “TSTF”) to identify plan goals and objectives, advise on the project’s ongoing development, and review draft and final plan recommendations. Subcommittees of this core group may also be established, in consultation with the core TSTF, based on focused topics and/or geography. The Consultant is expected to work with Staff to facilitate a shared system of accountability by preparing meeting activities, takeaway assignments, meeting agendas, presentations, and meeting minutes for each TSTF meeting.

The Consultant may be requested to support Staff with TSTF contact gathering and outreach to ensure a broad diversity of stakeholders from throughout the planning area. TSTF membership will include representation from each of the CRTPO’s 24 participating member jurisdictions with the participation of local, regional, and state transportation staff, research professionals, school officials, first responders, public health professionals and any others with a technical interface with transportation

#### **Deliverables:**

- TSTF schedule
- TSTF agendas, presentations, and meeting summaries

#### **Task 1.4: Public Education & Outreach Consultant Team Coordination**

This solicitation is paralleled by a *Public Education & Outreach* Request for Proposals (RFP). The *Data Analysis and Plan Development* Consultant will be expected to participate in and remain apprised of the following tasks led by the selected *Public Education & Outreach* Consultant:

- Task 1.3: Project Performance and Invoicing
- Task 2.1: Safety Advisory Groups
- Task 2.2: CSAP Branding Package
- Task 3.1: Public Outreach Events
- Task 3.2: Public Education Programming
- Task 3.3: Public Messaging Campaign

#### **Task 1.5: CRTPO *Making Our Roads SAFER* Project Team Coordination**

This project is concurrent with the CRTPO's *Making Our Roads SAFER* cross-jurisdictional study, complementary to the CSAP process with mobility audits in historically underserved and transportation disadvantaged communities. The selected Consultant is expected to coordinate with the CRTPO's *SAFER* Project Manager to remain apprised of project updates and relevant materials.

#### **Task 2: Existing Conditions Inventory and Analysis**

The Consultant will analyze the built and policy environment within the CRTPO planning area to pinpoint gaps hindering the regional implementation of the [Safe System Approach](#). Findings will be compiled into tools and reports scoped in *Task 3*. Additional responsibilities and deliverables may be sought outside of these required elements as necessary and as set forth in negotiations.

##### **Task 2.1: Data Identification and Preparation**

The Consultant is expected to obtain, at a minimum, crash by mode, built environment, land use, and demographic data as baseline analysis. The Consultant is encouraged to adopt innovative technologies to create or procure new data insights. This data preparation may serve as the foundational attributes for *Task 3.6: Consolidated Data Interface & File Transfer* scoped in this solicitation. Datasets may include:

- Existing local High Injury Network datasets
- NCDOT five-year crash data
- Adopted future land use shapefiles
- Hospitalization and transportation-related public health data
- Model inventory of roadway elements
- Transit stop, station, and route location data
- US Census Bureau or other relevant authoritative datasets
- Zoning maps

##### **Deliverables:**

- CSAP shapefile/geodatabase repository

## **Task 2.2: Planning Area Safety Policy Review**

The Consultant will conduct a dual policy review of current safety planning and programming efforts at the CRTPO-level and among its member jurisdictions. Findings from these policy reviews are expected to be reviewed by the TSTF and included in the Final CSAP Document per *Task 3.7: Final CSAP Development*.

### **CRTPO Policy Review**

At the conclusion of this study, the CRTPO will utilize this study's deliverables to ensure MPO planning and programming processes contribute to the goal of meeting safety performance targets to reduce serious injuries and fatalities on the transportation network. To support this, the Consultant will be expected to review MPO plans and programs and provide policy and process recommendations to meet this reduction goal. The review list should include, at minimum:

- Beyond 77
- Comprehensive Transportation Plan
- CRTPO Complete Streets Policy
- CRTPO Strategic Plan
- Discretionary Grants Program policy
- Performance-Based Planning and Programming Targets and Data
- Metropolitan Transportation Plan
- NCDOT Prioritization
- Transportation Improvement Program
- Unified Planning Work Program

The Consultant is expected produce policy findings and recommendations for “adaptive policies” that the CRTPO can both implement and regularly monitor for effectiveness, to enhance its focus on transportation safety within core planning processes.

### **Deliverables:**

- CRTPO policy review and recommendations toolkit

### **Member Jurisdiction Policy Review**

The Consultant will be expected to work with CRTPO member jurisdictions to align both regional and local safety efforts. To that end, the Consultant will work with each member jurisdiction to understand current local transportation project evaluation and its impact on both local and regional safety outcomes.

This task also exists to ensure that the Consultant supports the CRTPO with appraisal on the progress of jurisdiction Safety Action Planning in progress, adopted, or in use for capital implementation, if applicable. Thus, the CRTPO may effectively support its members with non-redundant supplemental planning needs from its grant award as part of *Task 3.5: Local Jurisdiction Safety Action Plans and Supplemental Support*.

### **Deliverables:**

- Local policy review and recommendations toolkit
- Local Safety Action Plan development coordination (ongoing, if applicable)

### **Task 2.3: High Injury Network**

The Consultant will produce a High Injury Network (HIN) to visualize high-crash corridors and intersections throughout the CRTPO planning area. The Consultant is expected to leverage experience with innovative technologies to model best practices for a regional HIN methodology. Coordination with member jurisdictions is expected, especially those with current HINs that may be updated or included as part of the CRTPO CSAP process. The Consultant will engage and seek final HIN methodology approval from the TSTF before running the full planning area analysis.

The HIN may incorporate data layers collected in *Task 2.1* to identify community areas most affected by safety gaps in the transportation network, such as school zones, commercial districts, senior and adult living centers, and recreation areas.

Minimum required data outputs are to include:

- Baseline level of crashes involving fatal and serious injuries
- Contributing characteristics (impairment, distraction, speeding, etc.)
- Existing conditions (weather, time of day, etc.) and historical trends
- Geographic identification of high-risk intersection and corridor locations
- Involved user(s) characteristics (age, race, home zip code, insurance coverage, licensure)
- Involved user(s) mode (motorist, cyclist, pedestrian, transit rider)
- Involved vehicle and infrastructure characteristics

HIN feature layers and datasets are expected to be retained in the interactive tool scoped per *Task 3.6: Consolidated Data Interface & File Transfer*.

### **Deliverables:**

- Draft and final HIN methodology memorandum
- HIN data attributes

### **Task 2.4: Planning Area Systemic Safety Analysis**

To better understand characteristics posing increased risk exposure for prioritization of capital enhancements or supplemental engineering studies, the Consultant is expected to conduct a proactive planning area-wide Systemic Safety Analysis, as defined by the FHWA's [Quick Start Guide Systemic Safety Analysis](#), to include, at minimum:

1. **Target crash type identification**, representing the greatest number and type of severe crashes across the CRTPO transportation network, including datasets produced by the HIN in *Task 2.3*, such as pedestrian-involved or high-fatality crash prevalence.

2. **Focus facility type identification**, breaking target crash types into groupings of similar roadway characteristics, such as the number of lanes or posted speed limits.
3. **Roadway factor evaluation**, to provide an understanding of the built environment characteristics present at locations experiencing higher than anticipated frequencies of the target crash type on the focus facility type.

The Consultant is expected to utilize tools and innovation to help scale and conduct the systemic analysis throughout the entire CRTPO planning area. Systemic Safety Analysis feature layers and datasets are expected to be retained in the interactive data tool scoped per *Task 3.6: Consolidated Data Interface & File Transfer*.

**Deliverables:**

- Draft and final Systemic Safety Analysis methodology memorandum
- Systemic Safety Analysis data attributes

**Task 2.5-A: Road Safety Audits**

Utilizing findings from the HIN and Systemic Safety Analysis, the Consultant is expected to identify corridors and intersections in each member jurisdiction for further field assessment via a Road Safety Audit (RSA). The Consultant is encouraged to use new and existing technology to support field data collection and analysis, including mobile applications to report deficient transportation facilities, speed feedback signage, intelligent video analytics systems, or other Intelligent Transportation Systems.

The Consultant is expected to develop a field observation methodology that follows best practices, such as those identified within the [FHWA's Road Safety Audit Guidelines](#). The methodology may be reviewed and approved by the TSTF, with the approved workflow clearly documented for later replication by the CRTPO and its partner agencies.

Site observations should consider, at minimum:

- Geometrics
  - Clear zone hazards
  - Curve radius
  - Lane widths
  - Shoulder widths
  - Sight distance
- Operations
  - Congestion (especially during peak hours and special events)
  - Posted vs operating speed behavior
  - Signal timing and phasing
  - Turning movements
  - Motorist yielding to crossing pedestrians
- Risk and aggressive behavior
  - Aggressive passing

- Near-miss instances
  - Red light and posted regulation violations
  - Speeding
- User and mode share
  - Commercial truck traffic
  - Cyclists
  - Pedestrians (especially school children, senior adults, adults with disabilities)
  - School buses
  - Transit boarding/waiting

The Consultant may support the selection of RSA field teams with membership from the TSTF, Safety Advisory Groups (in coordination with the *Public Education and Outreach* Consultant), and/or with the assistance of the Consultant's or other subcontracted staff. The Consultant is expected to support the facilitation of an RSA training prior to the field audits to convey data collection and field safety expectations.

Field observations are to be properly summarized with supporting imagery and geolocated datasets and are to be retained in the interactive tool scoped per *Task 3.6: Consolidated Data Interface & File Transfer*. Findings will be embedded within *Tasks 3.4, 3.5, and 3.7* to recommend relevant variable cost countermeasures and funding mechanisms for local, regional, and transit-adjacent safety improvements.

#### **Deliverables:**

- RSA draft and final observation location list
- RSA draft and final methodology process documentation
- RSA training facilitation
- Field observation reports
- Field observation data attributes

#### **Task 2.5-B: Transit Access Safety Audits**

Concurrent with the procedures and methodology of *Task 2.5-A*, the Consultant will coordinate with each respective transit agency to draft and document a methodology for reviewing transportation safety around fixed route or frequented demand-response pick-up/drop-off.

The Consultant is expected to seek feedback on candidate audit locations from each respective transit provider and may screen this feedback against data from the HIN and RSAs, and with feedback from the TSTF and Safety Advisory Groups, in coordination with the Public Education & Outreach consultant team.

Field observations are expected to be summarized within memorandums with supporting imagery and geolocated datasets and retained in the interactive tool scoped per *Task 3.6: Consolidated Data Interface & File Transfer*. This information is expected to support the Transit Access Safety Plans developed per *Task 3.4* to recommend relevant low-and-high-cost countermeasures and



funding mechanisms to that given transit provider and/or the coordinating agency responsible for maintaining right-of-way near a stop location.

**Deliverables:**

- Transit Access Safety Audit draft and final observation location list
- Transit Access Safety Audit draft and final methodology
- Transit Access Safety Audit training facilitation
- Field observation memorandum
- Field observation data attributes

**Task 3: Plan Recommendations and Final Deliverables**

The Consultant is expected to consolidate all plan findings and recommendations into an accessible, user-friendly, and illustrative document. These deliverables will be used by the CRTPO, its member jurisdictions, partners, and the public to advance safety in a meaningful way across the planning area. Additional responsibilities and deliverables may be sought outside of these required elements as necessary and as set forth in negotiations.

**Task 3.1: Project Recommendations & Prioritization**

The Consultant will provide clear recommendation priorities for the region's transportation network using a prioritization methodology informed by the planning process's data tools and public engagement. Project locations should consider context-appropriate countermeasures with interim quick-build solutions while a project location awaits larger capital funding. A prioritization methodology and draft scoring list are expected to be reviewed by the TSTF and Safety Advisory Group(s) prior to finalization.

Following approval, the Consultant shall prepare a "one-pager" for each recommended project location to include, but not be limited to:

- Information about the project location relative to the CRTPO planning area
- A summary of raw data findings
- Project priority score
- Recommended low-and-high-cost safety countermeasure treatments
- Potential funding, additional planning, statewide and regional programming, and/or technical support resources

**Deliverables:**

- Draft and final project prioritization scoring methodology
- Draft and final priority project list
- Priority project one-pagers
- Priority policy recommendations

**Task 3.2: MPO Safety Performance Measures Methodology**

The Consultant will develop a methodology, data tool(s), and ongoing performance management system to create region-specific safety targets for the CRTPO's annually required Safety Target adoption process. The proposed methodology system(s) should utilize a process and related software that are maintainable by the CRTPO beyond the conclusion of the study, including compatibility with existing GIS and data visualization infrastructure.

The TSTF will review the methodology and proposed safety performance targets in coordination with NCDOT Transportation Mobility and Safety and FHWA staff to ensure the methodology aligns with state and federal performance-based planning requirements.

Upon delivering the final CSAP document, the Consultant will provide adoptable MPO safety targets for the calendar year following the CSAP's adoption.

**Deliverables:**

- MPO safety performance targets methodology memorandum
- MPO safety performance targets generation and performance management tool
- MPO safety performance targets for adoption (for the calendar year following CSAP adoption)

**Task 3.3: Corridor Evaluation and Countermeasures Toolkit**

The Consultant is expected to develop a repeatable methodology for CRTPO Staff and member jurisdictions to evaluate corridors for multimodality and safety improvements. Corridor evaluation will consider, at minimum, location identification, needs assessment, safety countermeasures, and funding. Toolkit components are to be reviewed and approved by the TSTF and Staff and published as an appendix to the final CSAP.

**Deliverables:**

- Corridor Evaluation and Countermeasures Toolkit

**Task 3.4: Transit Access Safety Plans**

To support safe, context-sensitive access to fixed-route stations and demand-response pickup locations, the Consultant will develop Transit Access Safety Plans for each transit service provider in the CRTPO planning area. These transit-focused plans will match findings from the HIN, Systemic Safety Analysis, and transit safety audits within ½ mile of stop locations with recommended

countermeasures, site plan and land use evaluation, funding, and implementation next steps. This document is not intended to serve as a public transportation agency safety plan (PTASP) but rather assists with transit provider and member jurisdiction coordination on making transit stop-adjacent infrastructure safety improvements.

The Consultant is expected to collaborate with Staff to ensure regular communication with the planning area's transit providers in developing the final document.

#### **Deliverables:**

- Draft and final Transit Access Safety Plan document, PDF and artwork files

#### **Task 3.5: Local Jurisdiction Safety Action Plans and Supplemental Support**

Each of the CRTPO's 24 member jurisdictions will be expected to receive some variation of technical assistance based on current local safety planning efforts and needs. By default, Staff are seeking to produce a local Safety Action Plan for each of its member jurisdictions currently without an adopted plan or plan development process to leverage the analyses and recommendations from the planning area-wide CSAP, including focused HIN findings, short-and-long-term safety countermeasure recommendations, and priority project lists and recommended funding mechanisms for those projects.

For jurisdictions with recent planning awards or previously adopted plans, the Consultant is expected to collaborate alongside Staff and each member to ensure effective coordination and support where needed, examples including spot-area analyses, supplemental software analysis, and/or priority project list updates.

The list on the following page provides context around current safety planning efforts and needs throughout the planning area.

<b>CRTPO Planning Area Current Safety Planning Efforts and Needs</b>		
<b>Jurisdiction</b>	<b>Current Safety Planning Effort</b>	<b>Anticipated CRTPO Support</b>
City of Charlotte	Vision Zero Action Plan published in 2019, adopted as part of the Strategic Mobility Plan in 2022	Citywide Vision Zero Action Plan and related safety tools update
Town of Davidson	Vision Zero Action Plan adopted 2023	Local safety action plan implementation coordination and data sharing
Town of Huntersville	\$240,000 SS4A Action Plan Development award in 2024	Safety data sharing, local and regional SS4A coordination
Village of Marvin	\$57,600 SS4A Action Plan Development award in 2024	Safety data sharing, local and regional SS4A coordination
Town of Matthews	Vision Zero Action Plan adopted March 2025	Local safety action plan implementation coordination and data sharing
Mecklenburg County	Greenway, Built Environment and Active Living investments/policies	Countywide built environment policy and action plan review

City of Monroe	\$120,000 SS4A Action Plan Development award in 2024	Safety data sharing, local and regional SS4A coordination
Town of Mooresville	Vision Zero Action Plan adopted 2021  \$144,000 SS4A Supplemental Planning award in 2024	Local demonstration project coordination and data sharing
Town of Waxhaw	\$128,000 SS4A Action Plan Development award in 2023	Local safety action plan implementation coordination and data sharing
Town of Cornelius Town of Fairview Town of Indian Trail Iredell County Town of Marshville Mecklenburg County Town of Mineral Springs Town of Mint Hill Town of Pineville Town of Stallings City of Statesville Town of Troutman Union County Town of Weddington Village of Wesley Chapel Town of Wingate	No existing safety action plan	New Safety Action Plan development

**Deliverables:**

- Vary by jurisdiction;
  - Action plan update/new plan creation
  - Supplemental technical support

**Task 3.6: Consolidated Data Interface & File Transfer**

This task ensures the consolidation of all data generated by the Consultant into a single data visualization tool compatible with the CRTPO and City of Charlotte’s existing ArcGIS infrastructure and embeddable on the CRTPO website.

The Consultant is expected to transfer all visual datasets into this interface to be embedded on the CRTPO and partner agency websites, with a one-stop location for visualizing map, statistic, and performance tracking data.

**Deliverables:**

- CSAP consolidated data interface
- Data interface ownership and file transfer

### **Task 3.7: Final CSAP Development**

The final plan document is expected to integrate all project goals, data inventory and analyses, public outreach efforts, policy and planning recommendations, project prioritization, and identified next steps for implementation funding. The document is to be designed in collaboration with the *Public Education & Outreach* Consultant to ensure consistent use of the adopted CSAP branding and compliance with federal and local accessibility requirements.

The plan will also include the strategies and performance measures that will guide the planning, funding, and implementation of future projects, including a list of short-term actions for the CRTPO to guide the region towards the goal of zero deaths and serious injuries. The final document should be in a format that is adoptable by the CRTPO Board at the study's conclusion.

#### **Deliverables:**

- Draft and final CSAP document, PDF and artwork files

### **Task 3.8: Final Grant Performance Report**

Upon finalizing the CSAP process, the Consultant will prepare a Final Grant Performance Report for Staff to submit and sunset its grant agreement with FHWA. The Consultant is responsible for synthesizing quarterly report summaries (per *Task 1.2: Project Performance and Invoicing*) and public engagement performance data from the *Public Education and Outreach* Consultant.

The Final Grant Performance Report must detail, at minimum, the following:

- Incurred project costs
  - Cost per deliverable
  - Percentage of budget spent towards engaging underserved communities
- Lessons learned and recommendations for future strategies or projects
- Public engagement summary
  - Advertisement campaign duration
  - Demographics and audience sizes reached
  - Education event learning outcomes
  - Feedback received
  - Outreach activities conducted
  - Venue and advertisement locations

The final report shall be included as an appendix to the *Final CSAP Document* scoped per *Task 3.7: Final CSAP Development*.

#### **Deliverables:**

- Final Grant Performance Report

**FORMS**



**RFP # CRTPO SS4A 1**

**FORMS**

**Attached are required forms for RFP # CRTPO SS4A 1**

**Date Issued: May 13, 2025**

## FORM A – PROPOSAL COVER SHEET – COMPREHENSIVE SAFETY ACTION PLAN

<b>Company Legal Name:</b>	
<b>Contact Person for Proposal Process:</b>	
<b>Address:</b>	
<b>City/State/Zip:</b>	
<b>Telephone Number:</b>	
<b>Email Address:</b>	
<b>City VMS Number:</b>	<b>NCDOT Prequalified Circle one: Yes / No</b>
<b>List your NCDOT Pre-qualified Work codes:</b>	
<b>List UPWP Tasks that your firm meets criteria in providing Services</b>	<i>i.e., UPWP Task III-C-6 – Public Participation</i>
<p>The person executing the proposal, on behalf of the Company, being duly sworn, solemnly swears (or affirms) that neither he, nor any official, agent, or employee of the Company has entered into any agreement, participated in any collusion, or otherwise taken any action which is in restraint of full and open competition in connection with any proposal or contract, that the Company has not been convicted of violating North Carolina General Statute 133-24 within the last three years, and that the Company intends to do the work with its own bona fide employees or subcontractors and is not proposing for the benefit of another company.</p> <p>Submission of a response to this RFP constitutes Certification that the Company and all proposed team members are not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Project by any State or Federal department or agency. Submission is also an agreement that the City will be notified of any change in this status.</p> <p>NC General Statute 133-32 and City Policy prohibit any gift from anyone with a contract with the City, or from any person seeking to do business with the City. By execution of this proposal, you attest, for your entire organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.</p> <p>The information contained in this qualification package, including its forms and other documents, delivered or to be delivered to the City, is true, accurate, and complete. This qualification package includes all information necessary to ensure that the statements therein do not in whole or in part mislead the City as to any material facts.</p>	
<b>Signature of Company's Authorized Representative:</b>	
<b>Printed Name and Title:</b>	
<b>Date Signed:</b>	

## FORM B– COMMERCIAL NON-DISCRIMINATION CERTIFICATION

**Project:** CRTPO – COMPREHENSIVE SAFETY ACTION PLAN

**Company:** \_\_\_\_\_

The undersigned proposer hereby certifies and agrees that the following information is correct:

1. In preparing its response, the proposer has considered all bids submitted from qualified, potential sub consultants and suppliers and has not engaged in discrimination as defined in Section 2 below.
2. For purposes of this section, *discrimination* means discrimination in the solicitation, selection, or treatment of any sub consultant, vendor, supplier or commercial customer on the basis of race, ethnicity, gender, age, religion, national origin, disability or other unlawful form of discrimination. Without limiting the foregoing, *discrimination* also includes retaliating against any person or other entity for reporting any incident of discrimination.
3. Without limiting any other remedies that the City may have for false certification, it is understood and agreed that, if this Certification is false, such false Certification will constitute grounds for the City to reject the bid submitted with this Certification and terminate any contract awarded based on such bid. It shall also constitute a violation of the City's Commercial Non-Discrimination Ordinance and shall subject the proposer to any remedies allowed thereunder, including possible disqualification from participating in City contracts for up to two years.
4. As a condition of contracting with the City, the proposer agrees to promptly provide to the City all information and documentation that may be requested by the City from time to time regarding the solicitation and selection of sub-consultants and suppliers. Failure to maintain or failure to provide such information shall constitute grounds for the City to reject the bid and to terminate any contract awarded on such bid. It shall also constitute a violation of the City's Commercial Non-Discrimination Ordinance and shall subject the proposer to any remedies that are allowed thereunder.
5. As part of its bid, the proposer shall provide to the City a list of all instances within the past ten years where a complaint was filed or pending against the proposer in a legal or administrative proceeding alleging that the proposer discriminated against its sub-consultants, vendors, suppliers, or commercial customers, and a description of the status or resolution of that complaint, including any remedial action taken.
6. As a condition of submitting a bid to the City, the proposer agrees to comply with the City's Commercial Non-Discrimination Policy as described in Section 2, Article V of the Charlotte City Code and consents to be bound by the award of any arbitration conducted thereunder.

By: \_\_\_\_\_  
*Signature of Company's Authorized Representative*

Title: \_\_\_\_\_



### FORM C - E-VERIFY CERTIFICATION

**Project:** CRTPO – COMPREHENSIVE SAFETY ACTION PLAN

**Company:** \_\_\_\_\_

This E-Verify Certification is provided to the City of Charlotte (the "City") by the company signing below ("Company") as a prerequisite to the City considering Company for award of a City contract (the "Contract").

1. Company understands that:
  - a. E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies to enable employers to verify the work authorization of employees pursuant to federal law, as modified from time to time.
  - b. Article 2 of Chapter 64 of the North Carolina General Statutes requires employers that transact business in this state and employ 25 or more employees in this state to: (i) verify the work authorization of newly hired employees who will be performing work in North Carolina through E-Verify; and (ii) maintain records of such verification ( the "E-Verify Requirements").
  - c. North Carolina General Statute 160A-20.1(b) prohibits the City from entering into contracts unless the contractor and all subcontractors comply with the E-Verify Requirements.
2. As a condition of being considered for the Contract, Company certifies that:
  - a. If Company has 25 or more employees working in North Carolina (whether now or at any time during the term of the contract), Company has complied and will comply with the E-Verify Requirements with respect to Company employees working in North Carolina; and
  - b. Regardless of how many employees Company has working in North Carolina, Company will take appropriate steps to ensure that each subcontractor performing work on the contract that has 25 or more employees working in North Carolina complies with the E-Verify Requirements.
3. Company acknowledges that the City will be relying on this Certification in entering into the contract, and that the City may incur expenses and damages if the City enters into the Contract with Company and Company or any subcontractor fails to comply with the E-Verify Requirements. Company agrees to indemnify and save the City harmless from and against all losses, damages, costs, expenses (including reasonable attorney's fees) obligations, duties, fines and penalties (collectively "Losses") arising directly or indirectly from violation of the E-Verify Requirements by Company or any of its subcontractors, including without limitation any Losses incurred as a result of the contract being deemed void.

\_\_\_\_\_  
*Signature of Company's Authorized Representative*

\_\_\_\_\_  
*Date*

*Print Name and Title:* \_\_\_\_\_