



## FCTA Professional Consulting Services

SALES TAX EXTENSION  
Public Opinion Polling Services

**REQUEST FOR PROPOSALS**

**Proposals Due:**

**12:00 PM –**

**Friday, March 20, 2020**



**MOVING FORWARD**



## MEASURE C IN FRESNO COUNTY

The Fresno County Transportation Authority (FCTA or Authority) is a local transportation authority organized and existing pursuant to California Public Utilities Code Division 15 (Sections 142000-142277, inclusive). The FCTA was created in 1986, when Fresno County voters passed Measure C, a one-half percent sales and use tax, with a goal of improving the overall quality of Fresno County's transportation system. In its first 20 years, Measure C delivered more than \$1 billion worth of improvements to state highways and streets and roads, helping to build additional lanes and thus enhancing the regional transportation system.

As a result of the successful 1986 Measure, Fresno County residents voted in 2006 to extend Measure C for an additional 20 years. Funding from the Measure C Extension (2007-2027) has and will continue to benefit daily commuters, transit riders, and other Fresno County residents with unique mobility needs. The 2006 Measure C Extension has funded improvements to local roadways by repairing potholes and paving streets, building sidewalks, bike paths and trails, as well as funding transit, ride-share incentive programs, and environmental enhancement programs that lessen the impact of greenhouse gas and other vehicle emissions in the Central Valley.

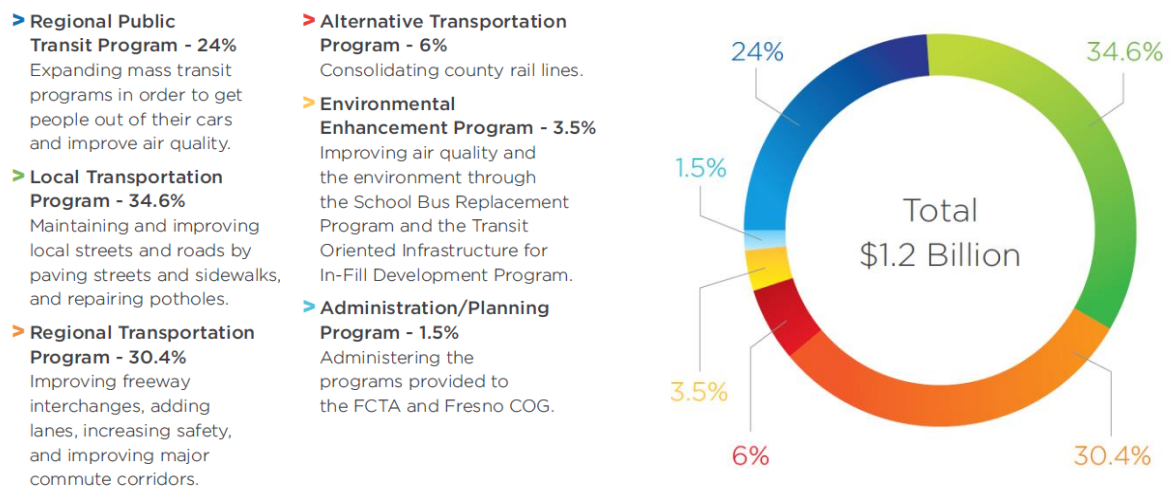
**For more information about the FCTA, please go to: [www.MeasureC.com](http://www.MeasureC.com).**

## THE FCTA

The FCTA has a staff of three (3) full-time employees (Executive Director, Contracts Administrator, and Program Manager). All other services are provided by consultants acting as independent contractors pursuant to contract. Budgeted revenues during Fiscal Year (FY) 2019-20 are \$86,030,980, 34.6% of which is passed through to local agencies (the cities and the County).

Policy direction is provided by a nine-member governing board of local elected officials (County supervisors, mayors and/or city councilpersons) and two public members at large (representing the urban and rural areas of the County).

The six major programs of the Measure C Extension are described and shown below:



The FCTA is responsible for administering the Measure C program and the countywide Regional Transportation Mitigation Fee (RTMF). The RTMF was mandated in the Measure C Extension Expenditure Plan and approved by the voters in 2006 to fund specific infrastructure improvement projects.

## FRESNO COUNTY TRANSPORTATION AUTHORITY REQUEST FOR PROPOSALS – SALES TAX EXTENSION PUBLIC OPINION POLLING SERVICES

FCTA is seeking proposals from experienced public opinion polling firms to assist with the development of a sales tax extension plan and services including preparation of a draft and final Expenditure Plan to be presented to the voters of Fresno County in November 2022.

At its August 2019 Authority meeting, the Board agreed to proceed with efforts to place renewal of Measure C on the 2022 ballot. At their September 26, 2019 meeting, the Fresno Council of Governments (Fresno COG or FCOG) Policy Board also authorized staff to proceed with renewal in 2022. Since that time, the Authority retained VRPA Technologies to assist FCTA with development of a Measure C Expenditure Plan. FCTA, FCOG and VRPA staff-initiated work activity as part of their Project Team efforts. Responsibilities of the Project Team include:

- ✓ Assist with the formation of a Measure C Renewal Executive Committee and the Measure C III Working Group, which will provide input and guidance and have the primary responsibility to develop a draft and final Expenditure Plan for the Measure C Extension. Discussion of the Executive Committee and Working Group is provided below.
- ✓ Assist with the procurement and selection of a facilitator and a polling firm or firms.
- ✓ Provide support to the Executive Committee and the Working Group in determining the appropriate fund allocations by category and mode.
- ✓ Assist the Executive Committee and Working Group in identifying regional projects, developing preliminary cost estimates for these projects, and prioritizing identified projects for inclusion in the Expenditure Plan.
- ✓ Identify Federal and State funding programs and opportunities that could be used to leverage Measure C funds.
- ✓ Assist with development and implementation of consensus building and public outreach programs. FCTA has outreach consultant contracts in place but will need to procure additional support in this area.
- ✓ Prepare presentation materials and graphics as requested by FCTA, FCOG, the Executive Committee, and the Measure C III Working Group.
- ✓ Prepare, based primarily on input and guidance from the Executive Committee and the Working Group, the draft and final Expenditure plans for consideration by the voters.

### *Measure C Extension Executive Committee*

The Measure C Extension Executive Committee will be formed by March/April 2020 to assist FCTA), and FCOG with development of the 2022 Measure C ½ Percent Sales Tax for Transportation Extension. The Measure will be placed on the November 2022 General Election ballot for approval by voters. The Executive Committee would be comprised of community leaders of various public and private backgrounds. The Committee would be responsible for review of related information and to make recommendations to the FCTA and FCOG Boards regarding Extension Programs/Subprograms and the Final Extension Expenditure Plan.

Executive Committee responsibilities include, but are not limited to the following:

- ✓ Review Measure C III Working Group and Project Team products (transportation needs by mode, existing funding by mode, funding shortfalls by mode, determining the amount and duration of the extension, matching funding shortfalls with funding potentially available through the extension, individual program/subprogram definition, requirements and projects, performance measures, accountability standards, and implementing guidelines).
- ✓ Understand transportation needs and challenges by mode, existing funding available to the various modes, and the funding shortfall for each mode.
- ✓ Work with the Facilitator to achieve consensus regarding Extension Plan content noted above.
- ✓ Assist with development of polling efforts and integrating the polling with the funding recommendations from the Working Group and Project Team (see below).
- ✓ Provide information and feedback to other related stakeholders.
- ✓ Assist with preparation of the Draft and Final Measure C Extension Expenditure Plan.
- ✓ Forward recommendations related to development of the Expenditure Plan to the FCTA and FCOG Boards for discussion, as necessary.
- ✓ Recommend approval of the Final Expenditure Plan to the Authority and COG Policy Board.
- ✓ Assist with the presentation of Measure C Extension Program information at public workshops or joint agency workshops.

FCTA and FCOG staff would be responsible for preparing the meeting agendas, mailing the meeting packages, preparing most agenda items, as well as technical data and information to be distributed to the Executive Committee, and presenting the information to the Executive Committee.

### *Measure C III Working Group*

Supporting the Executive Committee will be a Measure C III Working Group. This Working Group will also be formed by March 2020 and will focus on every aspect of Expenditure Plan development and make recommendations to the Executive Committee. The Working Group will consist of representatives from all local agencies, other regional agencies, state agencies with transportation or transportation related responsibilities, modal advocates, and special interest groups. It will be this group's responsibility to identify all transportation needs, by mode, existing funding available to the various modes, and the funding shortfall for each mode. They will then match the funding shortfalls with the funding potentially available through a renewed Measure C.

Working Group responsibilities include the following:

- ✓ Review alternatives regarding the duration of the proposed Measure C Extension based on polling and funding need and recommend a preferred alternative to the Executive Committee.
- ✓ Review sales tax funding alternatives (recommend an appropriate funding percentage to the Executive Committee; i.e. .5%, .75%, etc. based on polling and funding need).
- ✓ Understand transportation needs and challenges by mode, existing funding available to the various modes, and the funding shortfall for each mode.
- ✓ Help match the funding shortfalls with the funding potentially available through the Measure C Extension.
- ✓ Help develop preliminary recommendations to the Executive Committee regarding allocations by program/subprogram, and assist with development of implementing guidelines, performance measures, and accountability standards for each funding program/subprogram.
- ✓ Assist with development of project lists and evaluation processes.
- ✓ Forward draft Working Group products (transportation needs by mode, existing funding by mode, funding shortfalls by mode, determining the amount and duration of the extension, matching funding shortfalls with funding potentially available through the extension, individual program/subprogram definition, requirements and projects, performance measures, accountability standards, and implementing guidelines) to the Executive Committee for review and feedback.
- ✓ Provide information and feedback to other related stakeholders.
- ✓ Assist with preparation of the Measure C Extension Draft Expenditure Plan.

FCTA and FCOG staff would be responsible for preparing the meeting agendas, mailing the meeting packages, preparing most agenda items, as well as technical data and information to be distributed to the Working Group, and presenting the information to the Working Group.

## SCOPE OF SERVICES

The Authority requires the professional services of a qualified consultant(s) to perform public opinion research services. The Authority seeks a competitive solution to meet the below described requirements and is issuing this Request for Proposals (RFP) to solicit proposals from qualified consultants. The Authority is releasing this RFP to interested consultant firms to conduct public opinion research to assist the Authority and its Steering Committee, Working Group and Project Team with development of the Extension Expenditure Plan. Two (2) statistically valid polls and meaningful research of voter attitudes in Fresno County about transportation priorities and voter opinion on the desirability of a special sales tax ballot measure that invests in transportation improvements across the county is desired. A Preliminary Draft Schedule of all Extension Plan activities, including the two separate polls/surveys has been developed by the Project Team as a guide over the next two (2) years (reference Appendix A). The two separate polls are envisioned as follows:

## Task 1 - Initial Public Opinion Poll of Registered Voters in Fresno County

### *Task 1.1 – Prepare the Opinion Poll/Survey Instrument*

Work with the Project Team to prepare the opinion poll/survey instrument and the methodology to be employed for a sampling of the registered voters. This includes a description of the type of registered voters to be included in the poll (high propensity voters or voters voting in the last major election, or other). The sampling should reflect the cultural, social and economic demographics of the County. The poll/survey instrument is to include a set of questions to be polled County-wide and a unique set of questions for each Supervisorial District, and each city. In addition, the poll/survey will reflect the following four (4) major components:

- ✓ Questions that focus on the respondent's knowledge of the existing Measure C.
- ✓ Questions regarding whether the respondent would support an extension of Measure C beyond the Year 2027 and how long it should be extended for.
- ✓ What the sales tax percentage should be to address transportation needs and funding shortfalls.
- ✓ Questions focusing on the types of multimodal improvements that the respondent would like implemented within the County using extended sales tax proceeds.

Following completion of the draft poll/survey instrument and the methodologies noted above, the Project Team and the consultant will meet to review the instrument and the sampling and survey methodologies and processes. The consultant will revise the poll/survey instrument and the sampling and survey methodologies. The draft poll/survey instrument and polling/survey methods will be presented once to the Executive Committee for review and comment. The Project Team will present the polling/survey instrument to the Working Group. The consultant will revise the draft poll/survey instrument and present the final version to the Project Team for final approval prior to conducting the poll/survey.

### *Task 1.2 – Conduct a Pretest of the Poll/Survey*

Using the revised poll/survey instrument, the consultant will conduct no fewer than 20 completed voter surveys to determine any needed revisions to the survey instrument to assure the maximum possible response rate and valid response. Considering results of the pretest, the consultant will revise the survey instrument and the sample survey methodologies and processes.

The consultant will then review results of the pretest, the final draft of the poll/survey instrument, and the sampling and poll/survey methodologies and processes with the Executive Committee. The Project Team will review the final draft of the poll/survey instrument with the Working Group. Based upon results of the pretest and input from the Executive Committee, Working Group, and Project Team, the consultant will finalize the survey instrument and the sampling and survey methodologies and processes and present the final version to the Project Team for final approval prior to conducting the poll/survey.

### *Task 1.3 - Conduct the Initial Poll*

The consultant will conduct the initial public opinion poll/survey of registered voters to ascertain their past attitudes related to perception of needs, use of transportation systems in Fresno County and travel behavior, favorability of renewing or increasing the sales tax and other methods of funding transportation, specific projects, accountability mechanisms, confidence in government, tax affordability, and other issues that influence voting behavior. The consultant

will be responsible for identifying and interviewing registered voters and representing a uniform sample for the population for each municipality as well as the County. Spanish and Hmong language polls/surveys shall be conducted or available, as needed.

#### *Task 1.4 – Document Initial Opinion Poll Findings*

The consultant will interpret the public opinion poll data/results and prepare an administrative Draft Report. The consultant will then meet with the Project Team to review the Administrative Draft Report including a standalone Executive Summary, poll/survey results including a tabulation of survey analysis and results, and key and detailed findings, conclusions and recommendations, answer questions regarding the implications of the responses, and discuss related issues. Based upon discussion with the Project Team, the consultant will prepare a Draft Report. Use of graphics to display poll/survey results is highly encouraged.

The analysis will incorporate the following items in the Draft Poll/Survey Report:

- ✓ A tabulation of the outcome of all calls or contacts made during the poll/survey (number of refusals, disconnected numbers, numbers that were busy or not answered after three attempts, and language and age issues).
- ✓ A tabulation of survey results, key findings, detailed findings, conclusions and recommendations reported for each survey independently and collectively for the entire County, each County Supervisorial District, each City, and by voter precinct.
- ✓ An appendix containing all referenced materials.

#### *Task 1.5 – Present Initial Poll Analysis, Results, Findings and Recommendations/Conclusions*

Present the Draft Written Report incorporating follow-on poll/survey analysis, results, findings and recommendations/conclusions to the Executive Committee. The Project Team will present poll/survey analysis, results, findings and recommendations/conclusions to the Working Group. The consultant may be asked to also attend that Group meeting. Based upon comments received, prepare the Final Report.

### **Task 2: Follow-on Public Opinion Poll**

#### *Task 2.1 – Prepare the Follow-On Opinion Poll/Survey Instrument*

Work with the Project Team to prepare the Follow-On Opinion Poll/Survey instrument and the methodology to be employed for a sampling of the registered voters. This includes a description of the type of registered voters to be included in the poll (high propensity voters or voters voting in the last major election, or other). The sampling should reflect the cultural, social and economic demographics of the County. The poll/survey instrument is to include a set of questions to be polled County-wide and a unique set of questions for each Supervisorial District, and each city. The questions will focus on voter opinion regarding contents of the Administrative Draft Extension Expenditure Plan.

Following completion of the draft poll/survey instrument and the methodologies noted above, the Project Team and the consultant will meet to review the instrument and the sampling and survey methodologies and processes. The consultant will revise the poll/survey instrument and the sampling and survey methodologies. The draft poll/survey instrument and polling/survey methods will be presented once to the Executive Committee for review and comment.

The Project Team will present the polling/survey instrument to the Working Group. The consultant will revise the draft poll/survey instrument and present the final version to the Project Team for final approval prior to conducting the poll/survey.

*Task 2.2 – Conduct a Pretest of the Follow-On Poll/Survey*

Using the revised poll/survey instrument, the consultant will conduct a recommended number of completed voter surveys to determine any needed revisions to the survey instrument to assure the maximum possible response rate and valid response. Considering results of the pretest, the consultant will revise the survey instrument and the sample survey methodologies and processes.

The consultant will then review results of the pretest, the final draft of the poll/survey instrument, and the sampling and poll/survey methodologies and processes with the Executive Committee. The Project Team will review the final draft of the poll/survey instrument with the Working Group. Based upon results of the pretest and input from the Executive Committee, Working Group, and Project Team, the consultant will finalize the survey instrument and the sampling and survey methodologies and processes and present the final version to the Project Team for final approval prior to conducting the poll/survey.

*Task 2.3 - Conduct the Follow-On Poll*

The consultant will conduct the public opinion poll/survey of registered voters to ascertain their attitudes related to information presented in the Administrative Draft Extension Expenditure Plan. The consultant will be responsible for identifying and interviewing registered voters and representing a uniform sample for the population for each municipality as well as the County. Spanish and Hmong language polls/surveys shall be conducted or available, as needed.

*Task 2.4 – Document Follow-On Opinion Poll Findings*

The consultant will interpret the public opinion poll data/results and prepare an administrative Draft Report. The consultant will then meet with the Project Team to review the Administrative Draft Report including a standalone Executive Summary, poll/survey results including a tabulation of survey analysis and results, and key and detailed findings, conclusions and recommendations, answer questions regarding the implications of the responses, and discuss related issues. Based upon discussion with the Project Team, the consultant will prepare a Draft Report. Use of graphics to display poll/survey results is highly encouraged.

The analysis will incorporate the following items in the Draft Poll/Survey Report:

- ✓ A tabulation of the outcome of all calls or contacts made during the poll/survey (number of refusals, disconnected numbers, numbers that were busy or not answered after three attempts, and language and age issues).
- ✓ A tabulation of survey results, key findings, detailed findings, conclusions and recommendations reported for each survey independently and collectively for the entire County, each County Supervisorial District, each City, and by voter precinct.
- ✓ An appendix containing all referenced materials.

*Task 2.5 – Present Follow-On Poll Analysis, Results, Findings and Recommendations/Conclusions*

Present the Draft Written Report incorporating follow-on poll/survey analysis, results, findings and recommendations/conclusions to the Executive Committee. The Project Team will present poll/survey analysis, results, findings and recommendations/conclusions to the Working Group.



The consultant may be asked to also attend that Group meeting. Based upon comments received, prepare the Final Report.

### Methods

The consultant is expected to utilize the most accurate and effective methods available to obtain actionable data from the voters of Fresno County, such as: telephone polls/surveys and/or electronic polls/surveys. Poll/survey samples shall be representative of Fresno County's diverse population and electorate and reflect likely outcomes in the November 2022 election. Spanish and Hmong language polls/surveys shall be conducted or available, as needed.

### Timeline

The consultant's Task 1 research and analysis must be complete no later than July 31, 2020. The consultant will be expected to remain available to provide ongoing services through January 31, 2022 to assist the Project Team with the follow-on opinion poll, research and analysis that will be needed to determine how voters are likely to vote on an extension of Measure C inclusive of the funding allocations to the various Programs and Subprograms, projects and implementing guidelines.

The services listed above collectively comprise the minimum requirements encompassed by the scope of work the consultant will be expected to perform. Proposing firms also should include in their proposed scope of work suggested strategies that have a proven track record of success with similar programs.

## PROPOSAL REQUIREMENTS

Proposing firms should submit the following: ***Important—Please submit your RFP responses with tabs or sections corresponding to the items below. This will assist the review team during evaluation of your firm's proposal.***

- ✓ Overall Firm Qualifications – Include statement on length of time firm has been in business and locations of office(s).
- ✓ Related Work Experience & References – Provide at least three (3) descriptions of relevant work previously conducted for this agency or other Self-Help Counties. All project descriptions should include references and cost of work conducted. The submittal of examples from previous work is highly encouraged.
- ✓ Resumes – Please provide resumes for all proposed staff including a statement on how long they have been employed by the proposing firm.
- ✓ Scope of Work – Provide an approach for implementing and accomplishing each of the tasks identified above, as well as any suggested additional tasks and strategies. Provide a description of deliverables for each task. Provide an overall schedule showing completion of all activities in time for inclusion of the new Measure on the November 2022 ballot.
- ✓ Cost Proposal – Provide a cost proposal that includes; billing rates of staff, level of effort by staff for each task, and cost for each task, including direct costs. Use the Standardized Cost Proposal format included with this RFP.

## EVALUATION PROCESS

Following the review and screening of all proposals, two or more firms may be invited to participate in the final selection process. This process may include the submission of additional information regarding costs, and explanation of strategies. The proposals will be evaluated, and a short list will be developed by the Project Team, which also may schedule and conduct Interviews with short listed firms prior to making its recommendation for final selection by the Authority Board.

## PROPOSAL SUBMITTAL

The deadline to submit proposals is Friday, March 20, 2020 at 12:00 PM by electronic transmission through email or through email with a file share program link to the proposal file, along with six (6) printed copies of the proposal sent to FCTA offices. A confirmation email will be sent by FCTA staff once the email submittal has been received or the file has been downloaded from a share file site.

The proposal must be signed by an authorized company representative and should be on company letterhead. **The cost proposal must be all inclusive of anticipated costs for all phases of producing and proofing the work, including but not limited to research, reasonable changes, and applicable taxes.** Additional charges will not be allowed without the express, advanced consent of the Authority. Late proposals will not be accepted and will be ineligible for consideration. Please transmit the proposal to:

**Denise DiBenedetto, Contracts Administrator**

Fresno County Transportation Authority

2220 Tulare Street Suite 2101

Fresno, CA 93721

559.600.3282

[denise@thefcta.com](mailto:denise@thefcta.com)

All proposals will be evaluated considering written responses to the items set forth above. Please limit your written responses. Creativity together with conciseness and brevity in the proposal are encouraged. All candidates will be notified as to the results of the evaluation process.

## OTHER INFORMATION

It is expected that the engagement will be for a period of 22 months, with negotiated extensions allowed, if required. Invoices will be accepted and paid based on the accepted rates for each hour the consultant is engaged in performing the services identified above. Payment will be made to the selected company within 30-days of submittal to the Authority of a properly completed invoice.

Any inquiries concerning this RFP or for more information must be directed to Denise DiBenedetto, Contracts Administrator at (559) 600-FCTA. It is intended that the selection shall be made on merit alone, consistent with the process set forth herein.

Accordingly, no contact of any kind, by or on behalf of any proposing firm, should be made with any FCTA Board members or their staff, or with the Authority staff or its consultants, other than as provided above. Adherence to this condition will assure that all information requests, and particularly the specific information or information referral each proposer receives, will be consistent, uniform, and available to all proposers. Proposing firms are hereby advised that violation of this condition may be cause for immediate rejection of the proposal.

## SELECTION TIMELINE

The RFP timeline is as follows:

RFP Issued	Friday, February 28, 2020
Deadline for Questions, Clarifications	Friday, March 13, 2020
Proposals Due	Friday, March 20, 2020, 12:00 PM
Determination of Short List	Tuesday, March 25, 2020
Consultant Interviews, if necessary	Week of April 6, 2020
Recommendation to the Board	Wednesday, April 22, 2020

## AWARD OF CONTRACT

The Authority reserves the right to reject any and all proposals or to select one or more firms. Award of contract, if any, will be made for one or more of the line items to the firm or firms having submitted a bid proposal that in the sole opinion of the Authority will provide the best and most responsive service, and whose qualifications and experience best address the needs of the Authority, with regard to such item(s). The Authority may award to a proposer covering one, all, or any combination of line items proposed. Any such award shall be expressly conditioned upon the subsequent execution by the successful bidder of an appropriate written agreement, as more thoroughly set forth below.

The Authority is under no obligation to accept the lowest bidder, as cost is only one factor to be considered in evaluation of the bid proposals. The Authority reserves the right to engage in further negotiations regarding proposed services and costs with any short-listed firm prior to making its recommendation(s) for award.

The content of all proposals shall be maintained as confidential until any such negotiations have been fully and finally concluded.

The terms and conditions of the work shall be set forth in writing in one or more final Professional Services Contract(s) ("Agreement"), the provisions of which shall be consistent with the proposal and any such additional terms as may be negotiated. The effectiveness of the contract award shall be expressly conditioned upon subsequent execution by the successful bidder of such written Agreement.

## ATTACHMENTS

- A: Standardized Cost Proposal
- B: Measure C 2006 Expenditure Plan
- C: Measure C 2017/18 Annual Report
- D: 2006 Measure C Extension Ballot Language
- E. Detailed Schedules