

## 5. SECTION B - SCOPE OF SERVICES

### 5.1. Background

Montgomery County, Maryland was one of the first County governments to [adopt Vision Zero](#) in 2016 and released its [first Vision Zero Action Plan](#) in 2017 and the long-range [2030 Vision Zero Action Plan](#) in 2021. The action plans were implemented under one and two-year work plans in [2017](#), [2020](#), [2021](#), [2022](#), and [2023](#).

Under the 2030 Vision Zero Action Plan, there are specific checkpoints “to evaluate what is working, integrate new evidence and technologies, and adapt to changing budget and external factors.” The plan calls for a full review of the Action Plan’s 45 action items in 2025 “to evaluate the implementation of Vision Zero and, as necessary, update the long-term action items based on evidence, leading practices, and budget.” Work under this award will assist the County in laying the groundwork for the action plan update by bringing together a multi-disciplinary group of subject matter experts to review the County’s Vision Zero implementation since adoption and develop recommended improvements. The assessment and recommendations developed under this project will be provided to the workgroups that will be leading the Vision Zero Action Plan update. The report will be published on the County’s Vision Zero website.

### 5.2. Intent

The County is seeking to enter into a contract with one (1) highly qualified Offeror to lead the Vision Zero implementation assessment as described in the Scope of Services below. Offerors may subcontract to meet the requirements for a multi-disciplinary team to lead the review or perform other portions of the Scope of Services.

### 5.3. Scope of Services

The Contractor must provide Montgomery County with an assessment of its Vision Zero Initiative’s strengths, weaknesses, opportunities, and threats (SWOT analysis) and recommendations to incorporate into the Vision Zero Action Plan update. Note that the update to the Vision Zero 2030 Action Plan is not part of the Scope of Work for this project. The Contractor, either through its firm or subcontractors, will provide subject matter experts with backgrounds including, but not limited to, the safe system approach, pedestrian and bicycle facility design, project management and delivery, community outreach, and traffic law enforcement to lead the review.

5.3.1. **Submit Project Plan:** The Contractor will ensure that County funding is utilized effectively and efficiently to meet the goals of the project. As part of the Contractor’s proposal, the Contractor will provide a draft scope of work with tasks, timelines, deliverables, and staffing plan to detail how the Contractor anticipates meeting the County’s requirements. The project plan should detail the staff assigned to work on the project, including description of staff’s qualifications to meet the project’s objectives, and how the plan will meet the Scope of Work and schedule detailed below. The project plan must be updated once a notice to proceed is provided by the Contract Administrator.

5.3.2. **Project Management:** This project will be conducted in close coordination with the Vision Zero Coordinator and the Vision Zero Steering Committee. The Vision Zero Steering Committee is chaired by the Office of the County Executive and its members are leadership from key departments implementing Vision Zero including Transportation, Police, Fire and Rescue Service, Public Information, and Montgomery Planning. The Contractor will be responsible for the daily management of the project team and will assign a Project Lead that meets or exceeds the requirements under 5.4 Contractor Qualifications below. At minimum, monthly progress updates will be provided by the Contractor to the Vision Zero Coordinator and Steering Committee that will identify the tasks accomplished, issues encountered, and how those issues are being resolved. The Contractor will also support the County in developing the required monthly and quarterly reports to USDOT/FHWA as part of the Safe Streets and Roads for All grant requirements. The

Contractor's project management will include quality assurance and quality control of all deliverables.

- 5.3.3. **Administrative Support for the Project:** The Contractor will provide resources that will help the County administer the program assessment. Administrative support includes, but is not limited to, drafting agendas, taking and distributing meeting notes and follow-up items, report drafting, and meeting facilitation for group interviews or workshops.
- 5.3.4. **Data Collection, Plan, and Report Review:** As part of the assessment, the Contractor will review a series of plans and reports developed between 2016 and the present related to the County's Vision Zero Initiative to review the County's evolution in planning and implementation. This includes the Vision Zero Action Plans and Work Plans, Vision Zero Annual Reports, Bicycle Master Plan, Pedestrian Master Plan, recommendations from the Fatal Crash Review Team, and statewide efforts such as the State's Strategic Highway Safety Plan. The Contractor will work with the Vision Zero Coordinator to identify any relevant documents for the Review Team.
- 5.3.5. **Stakeholder Feedback, Interviews, and Focus Groups:** The Review Team will have access to front line employees and leadership to get direct insights into Vision Zero implementation. The Contractor will gather input through interviews, surveys, focus groups, workshops, or other recommended feedback mechanisms to derive the Initiatives strengths, weaknesses, opportunities, and threats as seen by those working on Vision Zero.
- 5.3.6. **Draft Assessment and Recommendations:** The Contractor will utilize the data collected, reports reviewed, surveys completed, interview findings, and the analysis from the subject matter expert assessors to draft a report describing the Vision Zero Initiative's strengths, opportunities, weaknesses, and threats and recommendations to enhance the Initiative's implementation to meet the County's Vision Zero goal of eliminating serious injuries and fatalities. There will be at two (2) rounds of feedback from the Vision Zero Steering Committee on the draft report before a final report is issued. The suggested focus areas for the assessment report are listed below. The County is amenable to more or fewer focus areas based on the Contractor's project plan and input from the subject matter expert assessors.
- Safety Project Prioritization and Selection
  - Safety Project Delivery and Management
  - Vision Zero Initiative Management and Coordination
  - County Culture and Polices Alignment with Vision Zero and Safe System Approach
  - Outreach and Education Methods and Programs
  - Officer and Automated Law Enforcement
- 5.3.7. **Tentative Project Schedule**
- The County anticipates the project taking 4 to 6 months between the notice to proceed and the final assessment report. As part of the project plan, the Contractor should provide a schedule and detail if the Contractor believes work would necessitate beyond 6 months to complete. Project plans beyond the anticipated 6 months will not be penalized in the evaluation criteria as long as the plan clearly articulates the value to the County for a longer project timeline.
  - Kickoff meeting (Week 1)
  - Data Collection, Plan, and Report Review (Month 1)
  - Stakeholder Feedback, Interviews, and Focus Groups (Months 1 – 4)
  - Draft Assessment and Recommendations (Months 3-5)
  - Final Assessment and Recommendations (Months 4-6)

5.4. Contractor's Qualifications

- 5.4.1. Experienced firm and project team that can successfully facilitate and administer one-on-one interviews, panel interviews, and/or workshops with participants coming from diverse levels of experience, backgrounds, and perspectives to find consensus under prescribed deadlines. At least one project team member should have five (5) or more years of experience for this qualification.
- 5.4.2. Experience and knowledge of Vision Zero, complete streets, safe system approach, and/or other traffic safety programs. The Project Lead should have three (3) or more years of experience for this qualification.
- 5.4.3. Provides and can adhere to a project proposal with deliverables, timelines, milestones, and staffing plans that align with the timelines, budget, and expectations set in the Scope of Work above. The Project Lead should have five (5) or more years of experience for this qualification.
- 5.4.4. Provides an assessment panel of subject matter experts in the areas of, but not limited to, the safe system approach, pedestrian and bicycle facility design, project management and delivery, community outreach, and traffic law enforcement to lead the review. Subject matter experts should have seven (7) or more years of experience to qualify as a subject matter expert assessor. A separate person is *not* required for each area of expertise. For example, an expert in project delivery may also be an expert in pedestrian facility design and construction.
- 5.4.5. While minimum qualification thresholds are set for the Project Lead and Subject Matter Expert Assessors, the Contractor must detail the experience and qualifications of all proposed team members.
- 5.4.6. The Contractor must provide a list of at least three (3) professional references that can validate the Contractor's experience in providing services of similar scope and nature to the ones included in this solicitation. See Attachment A – References to provide your references along with your proposal.

5.5. Contractor's Responsibilities

The Contractor must provide services to the County in accordance with the terms and conditions of the Contract. Services will be provided within the fully burdened hourly rates agreed to in the Contract that is inclusive of overhead, cost of benefits, profit, multipliers, travel, etc. Billable hours and work performed shall be documented and submitted to the County's Contract Administrator when submitting a request for payment.

- Staffing: The contractor is responsible for providing the necessary staff to provide the services to the County. The staffing plan should provide a single Project Lead that meets or exceeds the requirements under 5.4 Contractor Qualifications above, administrative support for running meetings and interviews as described in 5.3.3, and assessors with subject matter expertise in, but not limited to, the safe system approach, pedestrian and bicycle facility design, project management and delivery, community outreach, and traffic law enforcement. The Contractor will notify the County in writing of any changes to staffing and the County reserves the right to reject substitute staffing if the substitute is deemed not eligible to provide the service as set in the Contract and/or does not have equal or better qualifications.
- Meeting Materials: If meetings are held in-person at County facilities, the contractor will provide printed agendas and materials to facilitate the discussion and brainstorm ideas such as, but not limited to, butcher paper, sticky notes, or printed activities. Materials to be provided by the County are listed in Section 5.6 below.

- Virtual Meeting Requirements - Meetings may be held completely virtually, in-person at County buildings, or hybrid virtual/in-person. The Contractor must ensure its staff have the technology and internet bandwidth to live-stream video from their computer, view live video from meeting participants, and share documents, presentations, and collaboration space (such as a virtual white board) with the workgroup in real-time. The County will provide a platform (Microsoft Teams) for meeting virtually, but the Contractor may substitute its own virtual meeting platform at its own expense if the Contractor's platform meets the meeting's needs and is approved for use by the County Government's Department of Technology and Enterprise Business Solutions.

#### 5.6. County's Responsibilities

- 5.6.1. Provide regular guidance to the Contractor through, at minimum, monthly in person or virtual meetings and e-mail. Guidance will be given from the Vision Zero Coordinator and Vision Zero Steering Committee.
- 5.6.2. Provide access to program documentation and data. Should the assessment team need updated or novel data analysis, the County will provide the analysis. The team should request data analyses early in the project. The team should expect 5-10 business days for requests of summary data analysis and 10-20 business days for more complex analysis requests that combine multiple data sources.
- 5.6.3. Facilitate introductions to key stakeholders for surveys, interviews, and workshops. The Vision Zero Coordinator will work with the assessment team to schedule the date, times, and locations of meetings. Meetings will typically be held during the traditional County workday, but may require early morning (before 8:30AM) and afternoon (after 5:00PM) meetings to meet the needs of all participants.
- 5.6.4. Offer timely feedback on draft reports and deliverables.
- 5.6.5. The County Government subscribes to the Microsoft Teams virtual meeting platform that allows for sharing video, audio, and meeting materials (such as slide deck presentations) in real-time. The County will create and set-up the virtual meetings. The County's virtual meeting solution will not require the Contractor to procure licensing or access the County's network to join the meeting. If there are issues with virtual meetings, the County will provide a conference call option for all meeting participants and facilitators. At the Contractor's expense, the Contractor can recommend and use a different virtual meeting platform.

#### 5.7. Reports/Deliverables

- 5.7.1. Meeting agendas and meeting notes.
- 5.7.2. Monthly and quarterly status reports to the Vision Zero Coordinator.
- 5.7.3. Two (2) drafts and a final report of the Vision Zero Initiative's strengths, weaknesses, opportunities, threats and recommended areas for enhancement.

### 6. SECTION C - PERFORMANCE PERIOD

#### 6.1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement. The period in which Contractor must perform all work under the Contract begins upon the County's issuance of a Notice to Proceed and ends after a one (1) year period. Contractor must also perform all work in accordance with time periods stated in the Scope of Work. Before this term for performance ends, the Director at his/her sole option may (but is not required to) renew the term. Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise this option to renew this term two (2) times for one (1) year each.