

Request for Proposals

Access Management: Synthesis of Practice

Issue Date: June 21, 2022

Deadline: 13:00 ET, July 25, 2022

A. INTRODUCTION

Chapter 8 – Access of TAC’s *Geometric Design Guide for Canadian Roads* (GDG) provides a framework for the review and approval of access proposals, with the goal of ensuring safe and effective access from a full range of road classifications to adjacent lands. Chapter 8 was not updated with other GDG chapters in 2017, and needs to be rewritten. The Geometric Design Committee’s Access Management Working Group has concluded that a full literature review and synthesis of provincial and municipal practice are not feasible to conduct as a volunteer project, leading to this pooled-fund project.

B. SCOPE

This project will synthesize current access management practices for all roadway classifications, in rural, suburban and urban areas, and will provide the technical basis for a subsequent project to update GDG Chapter 8. It will consider technical issues including:

- Geometric design requirements
- Safety considerations (e.g. conflict reduction, proximity to adjacent intersections/driveways, interaction with various road user facilities, sight distance, building setbacks, etc.; includes vulnerable road users)
- Operational requirements (e.g. turning movement restrictions, circulation/flow, etc.)
- Locational attributes such as land use type and roadway classification
- Utility and street furniture impacts
- Application of guidelines

Key tasks will include, but are not limited to:

- A review of the literature and existing access standards (e.g. TAC, non-TAC, FHWA, TRB, provincial, municipal)
- A review of available access management case studies
- A summary of best practices for consideration in subsequent work

C. DELIVERABLES

The main project deliverable will be a final report titled *Access Management: Synthesis of Practice* that documents the results of the three key tasks listed under Scope, above, and includes recommendations that will form the basis of an update to GDG Chapter 8. The project report will contain an executive summary, table of contents, list of figures, list of tables, introduction, background, compilation of detailed findings, recommendations and references. All information compiled during the project will be included, with appendices containing any content that is inappropriate for the main body.

Other deliverables will include:

- A table summarizing comments received during Project Steering Committee (PSC) review of deliverables, tracking who submitted the comment and specifying how the comment was addressed. This table is to be updated after each subsequent commenting period
- Bimonthly progress reports on task/schedule status and any perceived challenges, to be circulated to PSC members and presented at project meetings
- A PowerPoint deck describing the work undertaken and report contents to be presented by the consultant team leader to online meetings of the Project Steering Committee, Geometric Design Committee and Safety, Design & Operations Council during TAC’s 2023 Spring Technical Meetings (with the deck circulated in advance to the PSC, inclusive of the presenter’s notes)
- A PowerPoint deck suitable for a 30-minute presentation to be delivered by the consultant as a TAC webinar after the project is completed, and delivery of the webinar presentation

The consultant will provide:

- Microsoft Word/PowerPoint and PDF versions of the deliverables
- All figures that contain text as separate files, with text accessible and editable by TAC; exceptions include where original-source French-language graphics are also provided, or where TAC agrees that the technical content should remain in English. The consultant will provide credits for images drawn from other sources, and provide evidence that permission to reproduce them has been received.
- Spreadsheets in Microsoft Excel format

Deliverables must be submitted in English. TAC will provide an electronic Word template with preset report headings and styles to which consultants must adhere, with any variations subject to TAC approval. In addition, the selected proponent must adhere to TAC’s *Publication Guidelines*^[1] and *Guidelines for Pooled-Fund Projects*^[2].

D. SCHEDULE

The consultant should propose a project schedule that enables high-quality deliverables and varies from the following milestones only where a supporting rationale is provided:

- Contract award..... August 2022
- PSC & Consultant Meeting – kickoff (online)..... Early September 2022
- Submission of report table of contents, literature review and case study scan results.... October 31, 2022
- PSC comments due on initial deliverablesLate November 2022
- PSC Meeting (online)..... Early December 2022
- Submission of 50% report..... January 31, 2023
- PSC comments due on 50% report..... February 21, 2023
- PSC Meeting (online)..... Late February 2023
- Submission of 100% report..... March 31, 2023
- PSC comments due on 100% report..... April 21, 2023
- Presentation to PSC, GDC and SDOC (online)..... April 2023
- Submission of final report, graphics and slide deck..... May 2023

^[1] https://www.tac-atc.ca/sites/tac-atc.ca/files/site/doc/projects/docs/tac_publications_guidelines_2015-01-01_en.pdf

^[2] <https://www.tac-atc.ca/sites/tac-atc.ca/files/site/doc/projects/docs/pfp-guidelines.pdf>

- TAC webinar delivery..... June 2023

The PSC, including about 15 representatives of project funding partners, will be an active participant in project development by reviewing draft deliverables, with the consultant expected to address all comments. A minimum of 15 working days should be allocated for PSC members to review deliverables prior to meetings. It is required that the consultant team leader be present during meetings and presentations. Online meetings in addition to those scheduled with the PSC may be required.

E. BUDGET

This project’s maximum budget (fees and expenses) is \$53,000 excluding applicable taxes. Only fixed-price proposals will be accepted, and price is not a factor in their evaluation. Note that proposals exceeding the maximum budget will be disqualified. TAC will not accept invoices for cost overruns (fees or expenses) associated with the original scope of work.

A detailed cost breakdown is requested as part of the proposal; invoices must link billing amounts to the percentage of completion of major tasks. TAC will retain a 10% holdback from each payment until the final deliverables have been approved by the Safety, Design & Operations Council and accepted by TAC. All work conducted in the 12 months leading up to March 31 of each year must be invoiced by that date.

F. PROPOSAL REQUIREMENTS

The proposal should address the following subjects:

Project understanding – Demonstrate a clear understanding of the project’s scope and objectives, describe challenges that might be encountered in its execution, and propose measures to resolve them.

Methodology – Describe major tasks, resources to be applied, major information sources, planned analyses, and possible limitations. Although the working language for this project is English, the consultant will be expected to review literature and communicate with stakeholders in French, as required.

Schedule and resources – Show the proposed person-hours budgeted for each team member by task, and a schedule with key milestones. Proposals will identify a total cost with fees broken down by task and team member, as well as travel or other expenses. A fee breakdown should also consider the need to invoice for all work completed in the preceding 12 months by March 31 of each year. Proposals stating a total cost greater than the specified maximum budget will be disqualified (see Section E).

Consultant team – Identify a project leader and team members including subconsultants, describe their roles, and identify their experience on similar or otherwise relevant projects as well as any experience with TAC projects and processes.

References – Identify three organizations for which senior members of the consulting team have conducted similar or otherwise relevant projects, including the organization’s address and the name and telephone number of an individual familiar with the proponent’s work. TAC reserves the right to request additional references.

Conflict of interest declaration – Disclose possible financial or organizational conflicts of interest in conducting the project; for example, the proponent’s ownership, relationships or proprietary rights and interests could be perceived as jeopardizing its objectivity. Identify mitigating strategies for any such circumstances.

Proposals should include:

- A covering letter (not more than two pages long)
- Table of contents (optional)
- Main body (not more than 10 pages long, with 12-point single-spaced text and one-inch margins)
- Additional pages for:
 - Project cost breakdown (one page)
 - Project schedule (one page)
 - Project team organization chart (one page)
 - References
 - Conflict of interest declaration
- Team member résumés (each not more than four pages long total)

Note that any material in excess of these scope and length parameters will be deleted from proposals before evaluation.

G. PROPOSAL EVALUATION

TAC’s Project Manager (see Section I, below) must receive a PDF version of the proposal by email **no later than 13:00 ET on July 25, 2022**.

Email any questions regarding this Request for Proposals to TAC’s Project Manager **by July 5, 2022**. Addenda with responses will be posted to the RFP page on TAC’s website as soon as possible, but no later than **July 14, 2022**. Note that proponents are responsible to check for addenda.

H. PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated by the PSC based on the criteria listed in Table 1. As outlined in Section E, price is not a factor in proposal evaluation; however, proposals exceeding the maximum budget will be disqualified.

When top proponents have average scores within five points of each other, the selection will be made by a vote of PSC members.

Table 1: Proposal Evaluation Criteria

Evaluation Criteria	Weight
Understanding of scope, objectives and desired deliverables	20
Approach, methodology and level of detail of each included task	40
Adequacy of work plan and resources to ensure quality within required timeframes	15
Demonstrated qualifications, experience and competence of consultant lead and team members in areas relevant to this project	25
TOTAL >	100

I. PROJECT ADMINISTRATION

A contract for consulting services must be established with the consultant before work can begin.

TAC maintains an online collaborative platform to enable documentation sharing for this project. The working language for this project is English.

TAC's Project Manager will act as liaison between the PSC and the consultant for this project and will work with the PSC to review project deliverables and ensure objectives are met. For more information,

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