



REQUEST FOR PROPOSALS #2026-54

FOR

TRANSIT DEVELOPMENT PLAN

BOARD OF COUNTY COMMISSIONERS

CRAIG ROBERTS, Chair

PAUL SAVAS, Commissioner

MARTHA SCHRADER, Commissioner

BEN WEST, Commissioner

DIANA HELM, Commissioner

**Gary Schmidt
County Administrator**

**Stephanie Ebner
Contract Analyst**

PROPOSAL CLOSING DATE, TIME AND LOCATION

DATE: August 6, 2026

TIME: **2:00 PM, Pacific Time**

PLACE: <https://bidlocker.us/a/clackamascounty/BidLocker>

SCHEDULE

Request for Proposals Issued.....	June 29, 2026
Protest of Specifications Deadline.....	July 6, 2026, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	July 16, 2026, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time....	August 6, 2026, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award

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SECTION 1 NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **2:00 PM, August 6, 2026** (“Closing”), to provide Transit Development Plan. No Proposals will be received or considered after that time.

Location of RFP documents: OregonBuys

RFP Documents can be downloaded from the state of Oregon procurement website (“OregonBuys”) at the following address <https://oregonbuys.gov/bsa/view/login/login.xhtml>, Document No. S-C01010-00017332.

Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from OregonBuys.

Submitting Proposals: Bid Locker

Proposals will only be accepted electronically thru a secure online bid submission service, **Bid Locker**. *Email submissions to Clackamas County email addresses will no longer be accepted.*

- A. Completed proposal documents must arrive electronically via Bid Locker located at <https://bidlocker.us/a/clackamascounty/BidLocker>.
- B. Bid Locker will electronically document the date and time of all submissions. Completed documents must arrive by the deadline indicated in Section 1 or as modified by Addendum.
LATE PROPOSALS WILL NOT BE ACCEPTED.
- C. Proposers must register and create a profile for their business with Bid Locker in order to submit for this project. It is free to register for Bid Locker.
- D. Proposers with further questions concerning Bid Locker may review the Vendor’s Guide located at <https://www.clackamas.us/how-to-bid-on-county-projects>.

Contact Information

Procurement Process and Technical Questions: Stephanie Ebner, sebner@clackamas.us

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages proposals from Minority, Women, Veteran and Emerging Small Businesses.

SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

2.3 Protests of the RFP/Specifications: Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

2.4 Addenda: If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check OregonBuys for any notices, published addenda, or response to clarifying questions.

2.5 Submission of Proposals: Proposals must be submitted in accordance with Section 5. All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

2.6 Post-Selection Review and Protest of Award: County will name the apparent successful Proposer in a Notice of Intent to Award published on OregonBuys. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers shall be given seven (7) calendar days from the date on the Notice of Intent to Award to review the file at the Procurement Division office and file a written protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by email, hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for

award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

2.7 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

2.8 Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.345(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

“This information constitutes a trade secret under ORS 192.345(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” (ORS 192.345). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

2.9 Investigation of References: County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.10 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

2.11 Clarification and Clarity: County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.12 Right to Reject Proposals: County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

2.13 Cancellation: County reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.14 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an

extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.15 Oral Presentations: At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

2.16 Usage: It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.17 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

2.18 RFP Incorporated into Contract: This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

2.19 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

2.20 Prohibition on Commissions and Subcontractors: County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

2.21 Ownership of Proposals: All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

2.22 Clerical Errors in Awards: County reserves the right to correct inaccurate awards resulting from its clerical errors.

2.23 Rejection of Qualified Proposals: Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

2.24 Collusion: By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

2.25 Evaluation Committee: Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.26 Commencement of Work: The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

2.27 Nondiscrimination: The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

SECTION 3 SCOPE OF WORK

3.1. INTRODUCTION

Clackamas County is seeking Proposals from vendors to provide a Transit Development Plan Update.

Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.

3.2 BACKGROUND

The Clackamas County Board of Commissioners (BCC) have established a priority of that by 2027, the County will provide a plan for what **efficient**, **accessible** and **affordable** transit looks like in Clackamas County. The Transit Development Plan (TDP) will help to address this priority.

Currently, Clackamas County is home to six transit service providers that allow people to travel inside the urban area, within rural cities, and between rural cities and the urban area, as well as providing transit service up to Timberline Lodge on Mt. Hood. These transit systems, which include the routes served by each of these providers, the bus stops, transit centers and park-and-rides, all play a role in the accessibility of transit to the county residents. Within each transit system, there are choices on bus type, service frequency and hours that contribute to the availability of service.

In addition to the fixed route transit systems, transportation services are types of transit that connect people to places they need to go on demand. These on-demand transportation services are provided by the various transit providers as well as through Clackamas County-managed Transportation Reaching People. On a regional scale, these services are planned for within the Coordinated Transportation Services Plan for Seniors and/or Persons with Disabilities.

Having access to transit is only one element, but it is also essential that transit services are efficient. Efficient transit includes short or reasonable waiting times, direct travel times, systems that run on time and have clear information. Achieving an efficient transit system within Clackamas County requires coordination between providers and close attention to the service provided within each system. In addition to coordination, the efficiency of a transit system is impacted by the types of land uses it serves. A challenge for Clackamas County transit providers is a significant portion of the land area in the county is rural, or at suburban densities. These types of land uses may require alternatives to typical fixed route transit to achieve the best efficiencies.

Transit ridership was disrupted by the COVID pandemic, as well as impacted by increased work from home opportunities. The transit ridership landscape has since reached an apparent new equilibrium, with ridership stabilized at approximately 70% of pre-COVID levels. At this time, transit providers are faced with significant funding challenges. It is an opportune time to think deeply about how to move forward with providing transit in a more affordable way. It will be important to have a review of the existing funding sources that are used for transit and transportation services, as well as the various costs that are associated with providing the spectrum of transit and transportation services. Understanding the resources available and the costs of providing services is the foundation for creating a plan for affordable transit in the County.

In addition to the goal of creating a plan for transit in Clackamas County, the final product will need to address the requirements of the state Transportation Planning Rule OAR 660-012-710 Public Transportation System Requirements for areas located within the Portland Metropolitan Service District within Clackamas County, it will update the 2021 Transit Development Plan and it will contain a Clackamas County specific transportation services plan for older adults and persons with disabilities. The goal is to have a comprehensive, inclusive guide for future investments under HB2017 – Keep Oregon Moving’s Statewide Transportation Improvement Fund (STIF). Developing this plan in 2026-27 will refresh the recommendations of the original Transit Development Plan which was adopted in 2021, aligning with the suggestion of an approximately five-year update cadence laid out in that document.

Study Area

The study area includes all of Clackamas County, but there are some areas that will have a specific focus:

- 1) Transportation services planning for elderly and disabled persons shall focus on the entire County;
- 2) Within the TriMet area in Clackamas County, there will be a review of the fixed route transit service currently provided and an identification of ways to plan for efficient, accessible and affordable transit in this area; and
- 3) The unincorporated areas between the rural and small transit provider service areas will be reviewed to identify needed transit investments between the communities. Transit service within the rural and small transit provider areas will not be conducted as a part of this study.

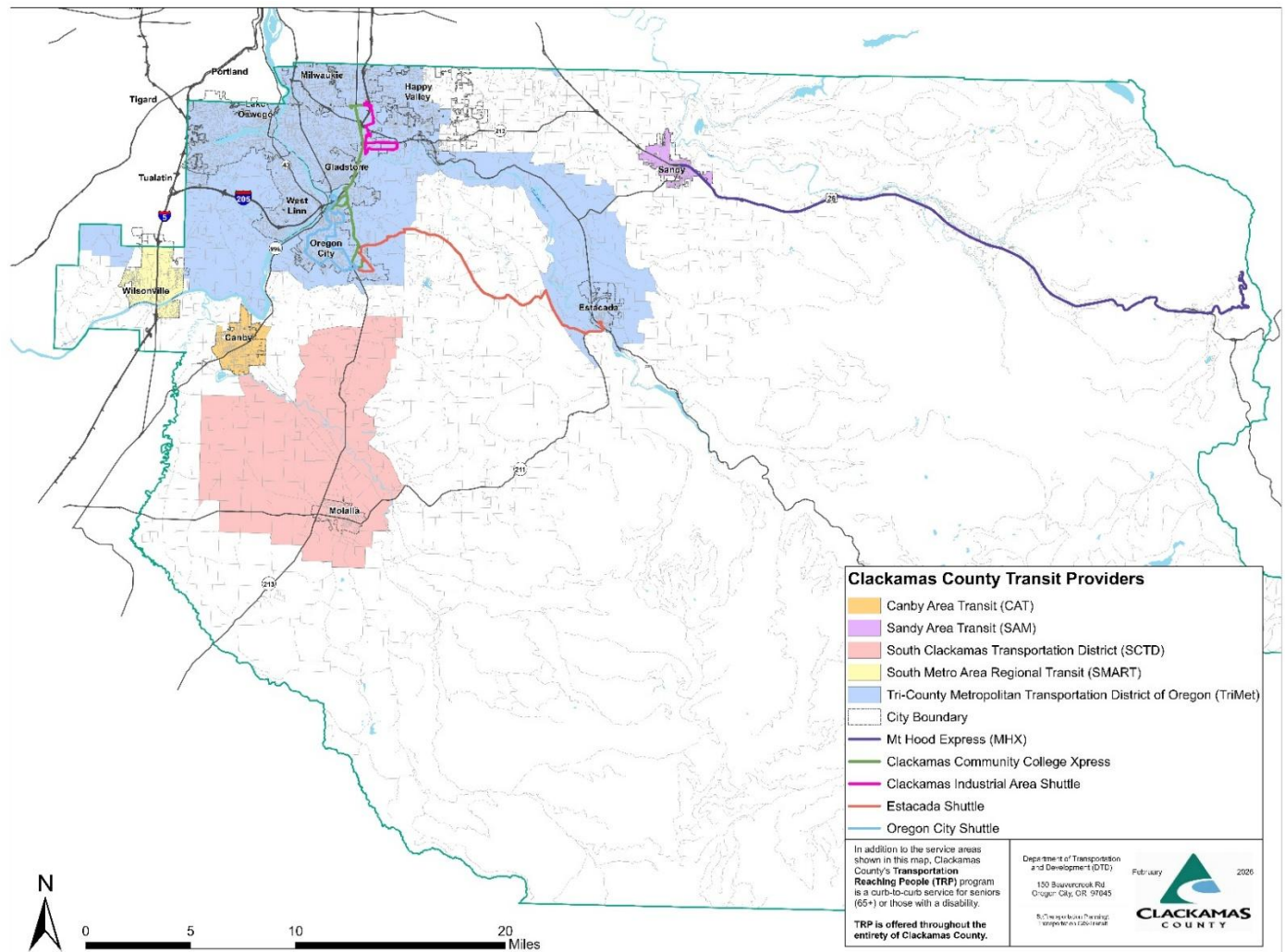


Figure 1: Clackamas County's Transit Service Provider Areas

Project Objectives

The project objectives are to:

- Enhance coordination between transit service providers operating in Clackamas County;
- Develop goals and objectives for an integrated transit framework, including both transportation services and other types of transit along the continuum of transportation and transit options;
- Identify gaps in both transit service and coverage;
- Identify barriers to accessing transit and strategies for increasing transit ridership;
- Identify opportunities to meet the transportation/transit needs of transit dependent populations including better access to employment and housing;
- Identify strategies to ensure that transit in Clackamas County is both efficient and accessible;
- Provide recommendations related to the various types of transit:
 - Fixed Route Transit – Recommended future investments to support ridership, service and coverage;
 - Shuttles - Integrate findings from recent regional studies as well as developing Clackamas County-specific guidance for shuttle or micro-transit services;
 - Transportation service for elderly and disabled;
 - Other transit options, such as vanpools, microtransit and Transportation Network Companies (i.e., Uber and Lyft);

- Identify priority transit service enhancements that can be integrated into future STIF plans and TriMet planning, and other planning work or funding opportunities; and
- Identify needed infrastructure investments, such as sidewalks and mobility hubs that are needed to support transit usage.

3.3. SCOPE OF WORK

3.3.1. Scope:

Task 1 Project Management and Project Administration

- 1.1 Project Oversight: PMT Meetings / Conference Calls – The Project Management Team (“PMT”) County staff (Transportation Planning, Transit Services, Public & Government Affairs-Communications), Consultant, and others as identified by County. The purpose of the PMT is to coordinate the project and guide project management decisions. The PMT is expected to meet virtually on an as-needed basis for a total of up to 24 times throughout the project. PMT meetings are expected to last an average of one hour.
- 1.1.1 Monthly Progress Reports – Project management duration is 12 months or until completion of all services required by this SOW. Consultant shall provide monthly progress reports (up to 12) that include updates on the status of deliverables, upcoming work and scope, budget or schedule issues.
- 1.2 Project Plan and Schedule – Consultant shall prepare the project schedule including the subtask name, deliverable, start date of the deliverable and end or due date of the deliverable.
- 1.3 Project Advisory Committee – The Project shall be supported by a Project Advisory Committee (PAC) which will also serve as the Technical Advisory Committee. The County shall organize PAC and prepare the roster to include member names and contact information. The PAC is expected to review and comment on deliverables and provide technical and policy advice according to member expertise. Membership shall include but is not limited to:
 - a) Clackamas County staff (Transportation Planning, Social Services, Public Health, Public and Government Affairs);
 - b) Transit Providers operating in Clackamas County (TriMet, South Metro Area Regional Transit (SMART), Canby Area Transit (CAT), Sandy Area Metro (SAM), South Clackamas Transportation District (SCTD), Mt. Hood Express);
 - c) Clackamas Community College;
 - d) Business Community (Chamber of Commerce/Large employer); and
 - e) Representatives from organizations that advocate on behalf of underserved communities, including:
 - a. Low-income communities;
 - b. Seniors; and
 - c. Disabled users

Task 2 Public Engagement Plan & Project Schedule Refinement

- 2.1 Interim Title VI Assessment Report – Consultant shall prepare an Interim Title VI report outlining demographic data needed for the Project. It must include an analysis of the census data to report on the numbers of protected populations. Particular attention must be given to limited English proficiency speakers and those without internet access to determine how best to accommodate their needs during outreach efforts. The County’s Demographic Index should also be used during this process. The Interim Title VI report should also specifically address the needs older adults and people with disabilities.

- 2.2 Draft and Final Public Engagement Plan – Consultant shall draft a public engagement plan that will outline efforts and methods to share information and gain input throughout the project from a wide range of interested County residents and community representatives and then incorporate comments from PMT and PAC for final version. Using the Interim Title VI Assessment Report, the Public Engagement Plan shall identify specific steps needed to engage the federal Title VI populations. In addition, it shall incorporate findings from the Framework for Engagement and Decision-making with Underserved Populations. It is expected that the funding for the needed translation of materials and support at meetings should be included within the Consultant engagement budget. In addition, all materials prepared for the project shall be developed to meet compliance for ADA web accessibility per Clackamas County guidelines.

Three major public touchpoints shall be included in the Public Engagement Plan, each with a corresponding survey aspect:

- a) Touchpoint #1: Existing Conditions (Task 3.3)
- b) Touchpoint #2: Needs and Service Opportunities (Task 5.5)
- c) Touchpoint #3: Project Prioritization and Funding (Task 6.3)

Consultant and County shall agree on the details of the touchpoints, such as usage of focus groups, specific questions to ask the public, format, and software for the surveys.

- 2.3 Project Web Page – Consultant and County shall agree on the layout of the Project Web Page. County shall develop a Project Web Page, for the purpose of posting project materials and Consultant updates. Consultant shall develop initial materials including a project overview, project objectives, refined project schedule, a list of project deliverables and County contact information. County shall manage the Project Web Page and add all necessary materials as they are made available.
- 2.4 PMT Meetings #1 & #2 and Refined Project Schedule – Consultant shall organize and County shall lead 2 PMT Meetings to review project tasks, responsibilities and deliverables. These meetings will also include a discussion of roles and strategies to be utilized throughout the project. PMT shall review the draft Public Engagement Plan, Interim Title VI Assessment report, and Project Schedule, and discuss issues related to preparing upcoming deliverables including objectives for the Project Web Page
- 2.5 PAC Meeting #1 – County shall organize and Consultant shall lead PAC Meeting #1 to introduce the project and discuss the vision of achieving **efficient**, **accessible** and **affordable** transit in Clackamas County and the project outcomes. Consultant shall interactively work with the committee to discuss Public Engagement Plan, identify input into goals and objectives and provide overview of approach to developing Background information. Consultant is responsible for meeting agendas, materials and meeting notes.

Task 3 Background (Existing Conditions) and Plan Review

- 3.1 Plan Review – Consultant shall review and summarize available background information related to previously adopted transit plans, studies and transportation services documents consisting of County, local, regional and state policy and regulatory documents and existing data, including but not limited to the following:
- a) Clackamas County documents, including:
 - o Past and current Clackamas County STIF Plans;
 - o 2021 Transit Development Plan;

- 2026 Travel Options (Transportation Demand Management) Action Plan; and
 - Relevant Transportation Services documents
- b) Statewide documents, including:
 - STIF rules and documents
- c) Metro documents related to transit, including:
 - 2018 Regional Transit Strategy;
 - Metro Community Connector Study; and
 - High Capacity Transit Plan
- d) TriMet plans, including:
 - 2025 TriMet Coordinated Transportation Plan Update;
 - TriMet Forward Together 1.0, Forward Together 2.0, The Road Ahead;
 - FX Plan;
 - 2025 Level of Service Study; and
 - Current transit service maps and schedules
- e) Tri-County Coordinated Human Services Transportation Plan; and
- f) Transit plan documents from small and rural transit service providers, including funding information.

3.2 Data Collection – Consultant shall gather the data needed to complete the existing conditions analysis, including but not limited to the following:

- a) Fixed route data – including numbers of routes, service hours, number of passengers per service hour/service miles. This data should also include stop location and existing, planned and informal park-and-ride facilities;
- b) Transportation service provider areas;
- c) Existing information on transit travel patterns (origin and destination data);
- d) Relevant data and information from the most recent statewide travel survey
- e) Data needed for review of elderly and disabled service;
- f) Existing sidewalk data for infrastructure needs near stops;
- g) Existing transit surveys and information related to the users of the existing service;
- h) Generalized costs of providing various service types by different agencies. For example, cost of fixed route service for a specific frequency within the TriMet area, cost of shuttle service with specific frequency provided by ClackCo shuttles, costs of on-demand service. This information will be used to understand efficiency and affordability of transit; and
- i) Additional data related to available transit funding sources for various transit providers.

3.3 Public Touchpoint #1: Existing Conditions – Consultant shall conduct surveys to obtain input on existing usage, rider input into desired goals and plan objectives, and reasons for using the transit system in Clackamas County. These surveys will include:

- a) An on-board and/or transit stop intercept survey that includes riders of several transit lines and services. These surveys would be conducted in coordination with the appropriate local transit provider in order to establish a baseline of rider survey data across the transit providers within Clackamas County; and
- b) An online survey which riders and others can complete via the internet.

3.4 PMT Meetings #3 & #4 – Consultant shall organize and County shall lead PMT Meetings to review and discuss Draft Memo #1 as well as initial input into draft Goals, Objectives and Performance measures.

3.5 Draft Memo #1: Plan Review, Existing Conditions and Financial Overview – Consultant shall prepare Draft Memo #1 that documents the information developed in Task 3 and the following:

- a) Nature and extent of TriMet, County and other transit services in Clackamas County and to and from adjacent counties;
- b) Existing and future transit markets (e.g., geographic, demographic, trip type);
- c) Issues emerging from recent studies and transit agency actions;
- d) Unmet inter-city and intra-city existing transit markets in urban and rural areas for the general population and for special populations such as seniors, disabled, youths, veterans and others who may be transportation-disadvantaged;
- e) Overview of findings from Task 3.3 surveys; and
- f) Discussion of current conditions related to funding transit service including costs of service types and funding sources.

Task 4 Goals, Objectives and Performance Measures

4.1 Draft Memo #2: Goals, Objectives and Performance Measures – Considering Memo #1 (Plan review, Existing Conditions and Financial Overview) and input from PAC Meeting #1, Consultant shall prepare Draft Memo #2: Goals, Objectives and Performance Measures. Draft Memo #2 must include performance measures and benchmarks linked to the goals and objectives that will be used for evaluating existing transit system performance, selecting preferred transit and transit-supportive solutions, and defining on-going performance monitoring policies and practices. The development of the Goals and Objectives should incorporate direction from BCC priority goal for transit related to the following definitions of efficient and accessible transit:

- a) **Efficient:** A reliable and well-coordinated network that maximizes resources.
- b) **Accessible:** Designed and delivered so individuals can safely and independently use and understand it.

4.2 PMT Meeting #5 – Consultant shall organize and County shall lead PMT Meeting to review memos and prepare for PAC meeting #2.

4.3 PAC Meeting #2 – County shall organize and Consultant shall lead PAC Meeting #2 to solicit review of Draft Memo #1 Plan Review, Existing Conditions and Financial overview as well as Draft Memo #2: Vision, Goals and Objectives and Performance Measures

Task 5 Efficient and Accessible Transit: Needs and Service Opportunities

5.1 Focused Transportation Services Needs Assessment – Building on the findings of the Coordinated Human Services Plan that was adopted in 2025, the consultant shall conduct an assessment of transportation services needs for specifically for individuals with disabilities, older adults, and persons with low incomes. It shall include the following:

- a) An assessment of available services that identifies current transportation providers (public, private, and non-profit);
- b) An assessment of transportation needs for individuals with disabilities, older adults, and persons with low incomes. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service. It shall include the application of performance measures identified in Memo #1; and
- c) Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery.

- 5.2 Service and Infrastructure Gap Identification – The consultant shall identify the key gaps in transit service (both coverage and frequency) as well as the associated capital and infrastructure needs. It shall include specific recommendations in the TriMet district as well as outside of the TriMet district. It should include the following:
- a) Assessment of the key gaps in transit service and coverage;
 - b) Strategies for the County to provide potentially efficient and accessible transit to communities within the study area as conditions change;
 - c) Strategies to improve coordination with other transit providers both within and adjacent to the study area; and
 - d) Opportunities for improved bicycle and pedestrian access to transit, including (but not limited to) gaps in the sidewalk network.
- 5.3 Future Service Opportunities Analysis – Consultant shall identify Future Service Opportunities for future transit service based on needs identified in Tasks 5.1 and 5.2. The service opportunities shall include various service types, including, fixed route, shuttles, micro transit, vanpools and transportation network companies (Uber, Lyft, etc.). The analysis should also include opportunities for Transportation Service implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities.
- In addition, the Consultant shall provide more detailed information on recommended short-term operations and more conceptual information on long-term suggested strategies, such as:
- a) Short-term (one-to-three years) system maps and conceptual operating plans;
 - b) Long-term strategies describing service types, coverages and levels-of-service;
 - c) Order-of-magnitude operating and capital costs (rolling stock and transit facilities); and
 - d) Itemization of supporting Transportation Demand Management, land use, and bicycle and pedestrian transportation programs and investments.
- 5.4 Draft Memo #3: Needs and Service Opportunities – Using input from Public Engagement Touchpoint #1 and analysis completed in Task 5.1, 5.2 and 5.3, Memo #3 will summarize the needs and proposed solutions for gaps in Transit and Transportation Services. The Memo must present information in narrative form with tables, maps, and other graphics necessary to communicate key ideas and findings.
- 5.5 Public Touchpoint #2: Needs and Service Opportunities – Implement Public Engagement Plan to receive feedback on needs and opportunities to provide service. The purpose of the outreach is to obtain input on potential transit and transportation service as well as supporting infrastructure improvements. Public Touchpoint #2 may include focus groups, stakeholder meetings, small group updates, in-person meetings, or non-English outreach activities. This will inform Task 6 (Funding and Project Prioritization).
- 5.6 PMT Meetings #6 & #7 – Consultant shall organize and County shall lead PMT Meetings to review and discuss input into Needs and Solutions memo, development of public touchpoint #2, and preparation for the PAC Meeting.
- 5.7 PAC Meeting #3 – County shall organize and Consultant shall lead PAC Meeting #3 to solicit comments on Draft Memo #3: Needs and Solutions.

- 5.8 Finalize Memos #1, #2, & #3 – Consultant shall finalize Memos #1, Memo #2, and Memo #3 to incorporate comments from Public Touchpoint #2, PMT Meetings #6 and #7 and PAC Meeting #3.
- 5.9 Final Memo #1, #2, & #3 Executive Summaries – Consultant shall also provide a public-facing, plain-language executive summary of Final Memos #1, #2, & #3.

Task 6 Funding and Project Prioritization

- 6.1 Transit and Transportation Service Funding Summary – Using the data collected in Task 3, the consultant shall research and summarize the current funding sources for both transit and transportation services. It shall include:
- a) An overview of federal sources of funding;
 - b) Detailed information on how the STIF program functions and how it has changed since its initiation; and
 - c) Other sources of funding that support local transit providers.

The funding summary shall address various methods of providing transit and their associate costs.

- 6.2 Draft Memo #4: Project Prioritization and Cost Estimates – Consultant shall prepare Draft and Revised Draft Memo #4 and work with County to identify funding scenarios that will be used to develop financially constrained solution strategies.

Consultant shall examine the potential order-of-magnitude costs for solutions identified in Memo #3: Needs and Solutions. Consultant shall develop a methodological approach to cost estimates with County, seeking prior County approval before estimating any costs. The agreed-upon methodology must be documented in Draft Memo #4: Project Prioritization and Cost Estimates

A draft Project Prioritization list shall be developed that is inform be the Goals, Objectives and Performance Measures. The draft list shall be reviewed during Public Touchpoint #3 and PAC Meeting #4

- 6.3 Public Touchpoint #3: Project Prioritization and Funding – Implement Public Engagement Plan to receive feedback on project prioritization and funding. Public Touchpoint #3 may include focus groups, stakeholder meetings, small group updates, in-person meetings, or non-English outreach activities. This will inform the final tiering and prioritization of projects.

Consultant shall prepare a summary of comments received as well as a summary of Public Touchpoint #3 in Final Memo #4.

- 6.4 PMT Meetings #8 & #9 – Consultant shall organize and County shall lead PMT Meetings #8 and #9 to provide input, review and discuss Revised Draft Memo #4 Project Prioritization and Cost Estimates.
- 6.5 PAC Meeting #4 – Consultant shall organize and lead PAC Meeting #4 to solicit PAC comments on Revised Memo #4.
- 6.6 Final Memo #4: Project Prioritization and Cost Estimates – Consultant shall update Revised Draft Memo #4 to incorporate the comments from PMT Meetings #8 and #9 and PAC Meeting #4 and comments from Public Touchpoint #3.
- 6.7 Final Memo #4 Executive Summary – Consultant shall also provide a public-facing, plain-language executive summary of Final Memo #4.

Task 7 Transit Development Plan (Draft and Final)

The Transit Development Plan will update both the Transit Development Plan and create a Clackamas County specific Transportation Service plan. This task will bring together the information from the memos created throughout the project to create a clear document that contains projects recommendations that will be used during future STIF Plan development processes.

- 7.1 Plan Outline and Draft Plan – Consultant shall prepare an outline that is reviewed and discussed by the PMT. Using the outline, the consultant shall develop a draft of the Plan. This will include an Executive Summary, information developed in Memos 1 - 4, graphics and other visualizations.
- 7.2 Accessible Online Plan Document – The consultant shall assist the county in creating an ADA accessible online document that is based on the Executive Summary. If appropriate, this may be a ESRI StoryMap or similar type product, to be agreed upon by the consultant and county.
- 7.3 PMT Meetings #10 & #11 – Consultant shall organize lead PMT Meeting to discuss the Draft Plan and final PAC meeting.
- 7.4 Revised Draft Plan – Consultant shall update the Draft TSP to respond to comments received at PMT Meetings #10-11.
- 7.5 PAC Meeting #5 – Consultant shall organize, lead, and take notes for PAC Meeting #5 to solicit comments on Draft TSP and develop recommendations to the Planning Commission
- 7.6 Final Plan – Consultant shall prepare Final TSP, making revisions as needed based on input from PAC.
- 7.7 Final Title VI Report – Consultant shall prepare a Final Title VI Report that builds on the Task 2 Interim Title VI Report and documents process and outreach for all income, race, gender and age groups for the entire project.
- 7.8 Preparation of Materials for required amendments to Transportation System Plan and/or Comprehensive Plan Chapter 5: Transportation – The consultant shall prepare materials for any amendments to the Comprehensive Plan that are needed to implement the Final TDP.

Task 8 (Contingency) Affordable Transit Service Provision

- 8.1 Draft Memo #5: Analysis of Alternative Transit Service Models. – Building on the information completed in previous tasks, the consultant shall identify if there are alternative models for providing transit service that align with the BCC transit goal of **affordability**. In addition, the consultant shall reference and incorporate the findings in the Governance and Funding Strategies Memo (7.1.4) of the Metro Community Connector Study, analyzing these regionally-focused findings and case studies with a local lens so that they are relevant to Clackamas County needs and context.

The analysis should focus on how transit service is provided within the area currently served by the TriMet service district within Clackamas County as well as the areas outside of existing rural and small transit provider service districts. It should analyze the impact of implementing various service models on cost, accessibility and efficiency.

This analysis should address the following:

- a) Financial impacts for riders, especially those who are “cost-burdened” as defined in the Community Health Improvement Plan (CHIP);
- b) Examination of alternative models’ expected impacts to efficiency, accessibility, and safety;

- c) Ongoing operating costs for identified alternative models;
- d) One-time costs to transition to an alternative model; and
- e) Identification of obstacles (political, operational, or geographic) that could affect transition to an alternative model.

- 8.2 PMT Meetings #12 & #13 – Consultant shall organize lead PMT Meeting to discuss the Draft Memo #5.
- 8.3 PAC Meeting #6 – Consultant shall organize, lead, and take notes for PAC Meeting #6 to solicit comments on Draft Memo #5: Alternative Transit Service Models for Clackamas County.
- 8.4 Final Memo #5: Alternative Transit Service Models – Consultant shall update Revised Draft Memo #5 to incorporate the comments from PMT Meetings #12 and #13 and PAC Meeting #6.
- 8.5 Final Memo #5 Executive Summary – Consultant shall also provide a public-facing, plain-language executive summary of Final Memo #5.

3.3.2. Work Schedule:

Tasks

TASK 1: Project Management and Project Administration	Milestone: Ongoing
TASK 2: Public Engagement Plan & Project Schedule Refinement	Month 1-2
TASK 3: Background (Existing Conditions) and Plan Review	Month 2-3
TASK 4: Goals, Objectives and Performance Measures	Month 3-5
TASK 5: Efficient and Accessible Transit: Needs and Service Opportunities	Month 5-8
TASK 6: Funding and Project Prioritization	Month 8-11
TASK 7: Transit Development Plan (Draft and Final)	Month 11-12
TASK 8 (Contingency): Affordable Transit Service Provision	To Be Determined

3.3.3. Term of Contract:

The term of the contract shall be from the effective date through **December 2027**.

3.3.4 Sample Contract: Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Personal Services Contract for this RFP can be found at <https://www.clackamas.us/finance/terms.html>.

Personal Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- ☒ Article I, Paragraph 5 – Travel and Other Expense is Authorized
- ☐ Article II, Paragraph 28 – Confidentiality
- ☐ Article II, Paragraph 29 – Criminal Background Check Requirements
- ☐ Article II, Paragraph 30 – Key Persons
- ☐ Article II, Paragraph 31 – Cooperative Contracting
- ☐ Article II, Paragraph 32 – Federal Contracting Requirements
- ☐ Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- ☒ Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- ☒ Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- ☒ Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage.

SECTION 4 EVALUATION PROCEDURE

- 4.1** An evaluation committee will review all Proposals that are initially deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

4.2 Evaluation Criteria

<u>Category</u>	<u>Points available:</u>
Proposer's General Background and Qualifications	0-20
Scope of Work	0-25
Approach to Inclusive Community Engagement	0-20
Budget and Overall Fit	0-20
Contingency Task	0-10
References	0-5
Available points	0-100

- 4.3** Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

SECTION 5 PROPOSAL CONTENTS

5.1. Vendors must observe submission instructions and be advised as follows:

5.1.1. Proposals will only be accepted electronically thru Equity Hub's Bid Locker. Email submissions to Clackamas County email addresses will no longer be accepted.

5.1.2. Completed proposal documents must arrive electronically via Equity Hub's Bid Locker located at <https://bidlocker.us/a/clackamascounty/BidLocker>.

5.1.3. County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

5.1.4. Proposal may not exceed a total of **25 pages** (single-sided), inclusive of all exhibits, attachments, title pages, pages separations, table of contents, or other information. The Proposal Certification Page will NOT count towards the final page count. Pages shall be 8-1/2" x 11" standard sheet size, 11 point font, single-spaced.

Provide the following information in the order in which it appears below:

5.2. Proposer's General Background and Qualifications:

- Description of the firm.
- Experience of key individuals that would be assigned to this project.
- Description of similar project(s) within the past five (5) years.
- Description of the firm's ability to meet the requirements in Section 3: *Scope of Work*.
- Description of what distinguishes the firm from other firms performing a similar service.

5.3. Scope of Work

This criterion relates to the firm's understanding of the project and the methodology and course of action to meet the project objectives listed in Section 3: *Scope of Work*. Please provide a description of the following:

- Project understanding as described in the RFP.
- Key issues surrounding project, including the firm's understanding of what constitutes **efficient** and **accessible** transit.
- At least one page (11" X 17" allowed) of this section shall be dedicated to providing a detailed matrix illustrating tasks, subtasks and percent of overall project resources on one axis, and a timeline on the other axis. The matrix must identify the proportion of the time that the firm's staff would spend on the project, including time for any specialized services.

5.4. Approach to Inclusive Community Engagement

- Describe how you would design a process to ensure informed public engagement, project transparency, and wide participation specifically related to transit and transportation services.
- Provide past examples of effective public engagement outcomes and how they were measured, and the lessons learned.
- One objective of the project is to integrate the voices of all community members, particularly underrepresented populations and those who are reliant on transit and transportation services, into the final project recommendations. What strategy do you recommend for this project to involve these community members?

5.5. Budget and Overall Fit

- Describe firm's ability (as well as the ability of any subcontractor, if applicable) to deliver the project on time, within budget and to high quality standards.
- Provide a fee schedule for the main project work (Tasks 1-7) as an attachment. Fees should be on a time and material basis with a not to exceed fee. The proposed fees should not exceed **\$350,000.00**. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. Fees and fee schedules should outline all estimated expenses, hourly rates for all individual positions/job classifications (i.e. Planner II, etc.), anticipated travel, and other reimbursable expenses.

5.6. Contingency Task

- Describe firm's proposed approach to the potential contingency task (Task 8).
- Provide as an attachment a fee schedule for this contingency task (Task 8) that is independent of the schedule provided for the main project work (Tasks 1-7). Fees in this schedule are above and beyond the not-to-exceed \$350,000 for the main project work described in 5.5 above. Fees should be on a time and material basis with a not to exceed fee. List the not-to-exceed amount you propose for the service. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. Fees and fee schedules should outline all estimated expenses, hourly rates for all individual positions/job classifications (i.e. Planner II, etc.), anticipated travel, and other reimbursable expenses.
- Provide past examples of firm developing transit service models and financial analyses of service alternatives in suburban and rural communities.
- Describe how the information provided in the contingency task will support the creation of a plan for what **affordable** transit looks like in Clackamas County.

5.7. References

Provide three (3) references from clients your firm has served similar to the County in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-term client. Provide the name, address, email, and phone number of the references. Please note the required references may not be from County staff, but additional references may be supplied. References will be scored on demonstration that past work was judged by clients to be of high quality, was delivered on time by the agreed contracts, and was delivered to meet budgets as per the agreed contracts.

PROPOSAL CERTIFICATION
RFP #2026-54

Submitted by: _____
(Must be entity's full legal name, and State of Formation)

Each Proposer must read, complete and submit a copy of this Proposal Certification with their Proposal. Failure to do so may result in rejection of the Proposal. By signature on this Proposal Certification, the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury, the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS: As required in ORS 279B.110(2)(e), the undersigned hereby certifies that, to the best of the undersigned's knowledge, the Proposer is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means the tax laws of the state or a political subdivision of the state, including ORS 305.620 and ORS chapters 316, 317 and 318. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Proposer to 24% backup withholding.

SECTION II. NON-DISCRIMINATION: That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

SECTION III. CONFLICT OF INTEREST: The undersigned hereby certifies that no elected official, officer, agent or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFP, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its elected officials, officers, agents, or employees had induced Proposer to submit this Proposal. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a proposal for the same material, and is in all respects fair and without collusion or fraud.

SECTION IV. COMPLIANCE WITH SOLICITATION: The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFP (including any attachments); and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFP and Proposal; and
4. Will use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this RFP.

Name: _____ Date: _____

Signature: _____ Title: _____

Email: _____ Telephone: _____

Oregon Business Registry Number: _____ OR CCB # (if applicable): _____

Business Designation (check one):

☐ Corporation ☐ Partnership ☐ Sole Proprietorship ☐ Non-Profit ☐ Limited Liability Company

☐ Resident Quoter, as defined in ORS 279A.120

☐ Non-Resident Quote. Resident State: _____