



Ozarks Transportation Organization  
2208 W. Chesterfield Blvd., Suite 101  
Springfield, MO 65807  
Phone: (417) 865-3042 Ext. 106

## OZARKS TRANSPORTATION ORGANIZATION

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**REQUEST FOR PROPOSAL:** RFP #003-2023, Equity Engagement Consultant  
**DEADLINE:** *Friday, September 15, 2023, at 5:00 PM*, Central Standard Time  
**DELIVERY LOCATION:** 2208 W. Chesterfield Blvd., Suite 101, Springfield, MO 65807  
**PURCHASING AGENT:** Debbie Parks, [dparks@ozarkstransportation.org](mailto:dparks@ozarkstransportation.org)  
**DATE OF ISSUE:** Friday, August 25, 2023

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### REQUEST FOR PROPOSAL RFP #003-2023, Equity Engagement Consultant

RFP'S shall be submitted in an envelope with the Request for Proposal number and the respondent's name and address clearly indicated on the envelope or by e-mail with "REQUEST FOR PROPOSAL: #003-2023" in the subject line. All submissions must be submitted by the time and date above.

Respondents are strongly encouraged to carefully read the entire Request for Proposal.

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The undersigned hereby offers to furnish & deliver the services as specified, at the prices & terms stated herein, and in strict accordance with the specifications and general conditions of bidding, all of which are made a part of this offer. This offer is not subject to withdrawal by the Proposer unless upon mutual written agreement by the Proposer and the OTO Executive Director.

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Name of Firm/Consultant: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Phone: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## I. GENERAL INFORMATION

### Purpose

Ozarks Transportation Organization (OTO), located in Greene County, Missouri, requests submissions from firms interested in being selected as an equity engagement consultant (Consultant) to support public engagement and equity throughout the planning process for a transportation Safety Action Plan. The OTO will be developing this Plan produced by staff, with segments outsourced to a equity engagement consultant firm, and separately, a transportation safety engineering firm. This RFP specifically relates to the services to be provided by an equity engagement consultant as defined in Section III – Project Scope of Work.

### Background

The Ozarks Transportation Organization (OTO) Metropolitan Planning Organization (MPO) is the federally designated regional transportation planning organization that serves as a forum for cooperative transportation decision-making by state and local governments, and regional transportation and planning agencies. MPO's are charged with maintaining and conducting a "continuing, cooperative, and comprehensive" regional transportation planning and project programming process for the MPO's study area. The study area is defined as the area projected to become urbanized within the next 20 years.

OTO has entered into a contract with the Federal Highway Administration to develop a Transportation Safety Action Plan encompassing the OTO planning area, including portions of Christian and Greene Counties, as well as the cities of Battlefield, Nixa, Ozark, Republic, Springfield, Strafford, and Willard. Key to this planning effort is public engagement, especially the engagement of underserved, underrepresented, and vulnerable populations.

#### *Transportation Safety Action Plan Elements*

1. **Leadership Commitment and Goal Setting** (OTO Staff Lead)  
An official public commitment by a high-ranking official and/or governing body to an eventual goal of zero roadway fatalities and injuries. Commitment must include a goal and timeline. OTO Staff Leading
2. **Advisory Committee** (OTO Staff Lead)  
Body charged with oversight of Safety Action Plan development, implementation, and monitoring.
3. **Equity and Engagement** (Equity Engagement Consultant Lead)  
Early and late engagement of diverse populations, including the traditionally underserved. Engagement should include the general public and safety stakeholders. Include education on a culture of safety.
4. **Safety Analysis** (Staff Lead with Engineering Consultant)  
An analysis of existing conditions and historical trends that provides a baseline level of crashes involving fatalities and serious injuries across the region, including an analysis of crash locations by severity and contributing factors. Should also include an analysis of systemic and specific safety needs. All roadways, regardless of ownership, should be evaluated. Outcome should include a geospatially-based high-injury network.

5. **Policy and Process Review** (Engineering Consultant Lead)  
An assessment of current policies, plans, guidelines, and/or standards to identify opportunities to improve how processes prioritize transportation safety. Should address implementation through the adoption of revised or new policies, guidelines, and/or standards.
6. **Implementation Plan- Strategy and Project Prioritization** (Engineering Consultant Lead)  
Identification of a prioritized comprehensive set of projects and strategies, shaped by data, the best available evidence and noteworthy practices, as well as stakeholder input and equity considerations, that will address the safety problems described in the Action Plan. Include strategies and countermeasures that focus on a safe system approach, effective interventions, and consider multidisciplinary activities. Prioritization should consider timeframe – short-, mid-, and long-term, as well as specific projects and strategies, with descriptions.

## Key Safety Action Plan Milestones

The OTO has developed a schedule for key milestones for the completion of the Transportation Safety Action Plan produced by staff. An equity engagement firm should consider the overall plan milestones while developing their proposed schedule as outlined in the project scope.

Milestone Date	Milestone
August 16, 2023	Discuss Vision Zero Goals with Technical Planning Committee (TPC)
August 16, 2023	Appoint Advisory Committee Membership
September 2023-January 2024	Safety Analysis
September 15, 2023	Complete draft in-house safety analysis
September 21, 2023	Discuss Vision Zero Goals with Board of Directors
October 18, 2023	Recommendation of Vision Zero Goals by TPC to Board of Directors
November 16, 2023	Adoption of Vision Zero Goals by Board of Directors
January 2024	First Round of Community Meetings
January-March 2024	Policy Review
March-June 2024	Prioritization and Recommendations
June-August 2024	Development of Final Draft
August 2024	Second Round of Community Meetings
September 30, 2024	Finalize recommendations and draft to submit for FHWA Review
October 15, 2024	Complete FHWA review
December 31, 2024	Finish Public Comment
January 15, 2025	Technical Planning Committee Recommendation
February 20, 2025	Board of Director's Adoption

## OTO Policies and Procedures

The following OTO policies and procedures are applicable to the RFP:

- A. This RFP does not commit OTO to select a firm/consultant or to pay any costs incurred in the preparation or mailing of the submittal. A failure to award a contract will not result in a cause for action against the OTO.
- B. OTO reserves the right to the following:
  - To waive minor deficiencies and informalities.
  - To accept or reject any or all submissions received as a result of the RFP.
  - To obtain information concerning any or all proposers from any source.
  - To request an oral interview from any or all proposers.
  - If the selected firm/consultant undergoes a change of key personnel, OTO reserves the right to approve any substitute personnel or terminate the servicers at OTO sole discretion.
  - To seek new submissions when such a procedure is reasonable and in the best interests of OTO.
- C. The OTO follows FHWA purchasing guidelines and does not pay retainers or in advance of completed deliverables.

## II. SUBMITTAL INSTRUCTIONS

### Request for Proposal Schedule

The following is the schedule of events which are anticipated by OTO for the implementation and completion of selecting the firm/consultant to provide the requested services as outlined in the Statement of Scope. OTO may, at its discretion, revise the schedule of events at any time as may be in its best interests:

<u>Event</u>	<u>Date</u>
Post Request for Submissions	August 25, 2023
Final Questions Due from Proposers	September 8, 2023
OTO's Response to Questions	September 11, 2023
Submissions Due	September 15, 2023
Date for Potential Interviews	September 20 & 21, 2023
Final Selection Made	October 6, 2023

### Format of Proposals

For the OTO to adequately compare proposals and evaluate them uniformly and objectively, all proposals shall be submitted in accordance with the format outlined below. The proposals should be prepared simply and economically, providing straight-forward and concise information as requested. Proposals should not exceed fifteen (15) pages in length, excluding attached appendices.

The Scope and Schedule found in Section III of this RFP should be considered to illustrate how the process of engagement for a transportation safety plan will be orchestrated and should address the following when preparing the RFP Submittal.

1. **Company Information.** The complete legal name, address, Federal ID number or social security number, permanent address and telephone number of the Company including the name of the person to contact for discussion of the proposals.
2. **Company Overview/Capacity.** Overview of the Company, including the year founded, office locations, and the number of years services have been provided. A description of the firm's current staffing, and details as to the experience and educational proposals of the individuals that would be primarily responsible for the project. Demonstrate the capacity to handle the OTO equity engagement involvement process for the OTO Transportation Safety Plan. **Include the names of the individuals anticipated to be primarily responsible for the services to be provided under this proposal.**
3. **Experience.** Specific details as to the experience of the company and personnel as to the development of similar projects.
  - a. Consultant's experience with respect to involving equity engagement with multiple agencies, jurisdictions, and consultants.
  - b. Consultant's experience and familiarity with planning for transportation, and especially safety, considering trends and challenges that should be prepared and planned for by regions like the OTO.
4. **Proposal Details.** Details of approach that will be used to meet requirements outlined in the Scope and Deliverable Section of this Request for Proposal. This should include the proposed approach to accomplishing the public engagement as considered below:
  - a. Consultant's philosophy and approach to working with a wide range of stakeholder groups and citizens to develop a community vision.
  - b. Consultant's proposed approach to the Engagement Plan described within the Scope, especially engaging underrepresented populations and neighborhoods to implement public health and equity goals of the plan. Describe experience and use of innovative methods to generate public participation, specifically those aimed at engaging demographic groups that might not otherwise participate via traditional methods.
5. **Outline of Fees.** The total cost of conducting the public involvement process, including any initial set-up costs, as well as final deliverables. Cost should be presented for each Task and Deliverable as outlined in Section III – Project Scope of Work. Include pricing per public meeting if it is determined that more public meetings/outreach are needed beyond the initial scope.
6. **Schedule.** A proposed schedule to accomplish the overall public engagement should be attached.
  - a. Consultant's projected timeline and schedule of targeted milestones for engagement during the Safety Action Plan process. This should be based on the proposed Safety Action Plan Timeline found in Section III of this Request for Proposal.
7. **References.** A list of references with phone numbers should accompany the RFP.

## RFP Delivery Requirements

Any submittals received after the above stated time and date will not be considered. It shall be the sole responsibility of the proposer to have their RFP delivered to the OTO for receipt on or before the due date and time indicated. If a qualification submittal is sent by U.S. Mail, the proposer shall be responsible for its timely delivery to the OTO.

## Submissions

Proposals may be submitted by hand delivery, mail, e-mail, or DemandStar (link is on OTO website). Submissions should be received by OTO no later than the delivery deadline, **September 15, 2023, at 5:00 PM**

Submissions shall be addressed as follows:

By Mail/Hand Delivery:

Ozarks Transportation Organization (OTO)  
2208 W. Chesterfield Boulevard, Suite 101  
Springfield, MO 65807

By E-Mail:

[dparks@ozarkstransportation.org](mailto:dparks@ozarkstransportation.org)

Submissions should be marked in the email subject line or on the envelope:

“REQUEST FOR PROPOSAL: #003-2023”

Proposals submitted by e-mail are not to be considered received until a confirmation has been sent by the Purchasing Agent, Debbie Parks. The confirmation subject line will read, “Confirmation Receipt – OTO RFP 003-2023.” It is the responsibility of all submitters to verify receipt of proposal. All proposals must be valid for a minimum period of **ninety (90)** days from the close of this RFP.

## Amendments

If it becomes necessary to revise or amend any part of this Request for Proposal, OTO will furnish the revision by notice on the OTO website at <https://www.ozarkstransportation.org/what-we-do/requests-for-proposal> and through DemandStar not later than September 11, 2023.

## Point of contact for inquiries and submissions

Inquiries regarding this request for proposals may be directed to:

Debbie Parks

Ozarks Transportation Organization  
2208 W. Chesterfield Boulevard, Suite 101

Springfield, MO 65807

(417) 865-3042 x106

[DParks@Ozarkstransportation.org](mailto:DParks@Ozarkstransportation.org)

Inquiries must be received within 14 calendar days from the date the RFP is issued. Responses to all inquiries received by this deadline will be posted electronically and made publicly available at <https://www.ozarkstransportation.org/what-we-do/requests-for-proposal> within 18 calendar days from the date the RFP is issued.

## Submission Evaluation Process

The evaluation of submissions will include the following:

- OTO may confer with all responsible proposers who have been short-listed and may arrange, if necessary, for interviews/presentations by the short-listed firms.
- OTO reserves the right to conduct pre-award discussions with any or all responsive and responsible consultants who submit proposals determined to be reasonably acceptable of being selected for award. Consultants shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of submissions; and such revisions may be permitted after submission of proposals and prior to award of contract.

### Criteria for Award

OTO will evaluate submissions. Each submittal will be evaluated for full compliance with the RFP instructions. The objective of the evaluation will be to recommend the consultant who is most responsive to the herein described needs of OTO. Proposals which are responsive to this Request for Proposal will be evaluated based on, but not limited to, the following criteria:

- Understanding of project scope, quality of project approach **(35 points)**
- Demonstrated familiarity with community engagement including underrepresented people groups **(10 points)**
- Project Manager and Team Qualifications **(10 points)**
- Prior Experience **(15 points)**
- Project Fees **(20 points)**
- Staff availability and ability to produce deliverables at key milestones **(10 points)**

OTO reserves the right to select the firm with the most responsible and responsive Proposal which it finds to be within the best interest of the OTO.

## III. PROJECT SCOPE OF WORK

### Task 1 – Administration/Project Management

- Continuous coordination and response to requests from OTO staff throughout the duration of the project.
- The Consultant will attend monthly project team meetings and provide monthly progress reports. These reports should include an updated schedule, task progression, expected progress.
- The Consultant will create summaries for all meetings they attend. These summaries will include topics, generalized discussion points, main takeaways, and action items.
- Contract administration and billing preparation and review.
- Development and coordination of project schedule and Gantt Chart.
  - This schedule should include Equity Engagement tasks, sub-tasks, external tasks that feed into and/or affect the project or schedule.

- The Consultant will utilize a file sharing system set up by OTO for use by all parties engaged on the project.

## **Task 2 – Stakeholder Engagement Plan**

The Consultant will develop and implement a detailed stakeholder and public engagement program that seeks to gain authentic and meaningful public input from community members across the OTO area. A strong emphasis will be placed on equity and outreach to historically marginalized communities, economically disadvantaged communities, and areas of persistent poverty in the region. OTO will be working with the engineering consultant to develop branding for the Plan. This will be shared with the equity engagement consultant.

Many innovative strategies have been employed to engage the public in transportation planning efforts. The combination of activities often depends upon the specialization of firm, innovative trends, the nature of the community and the available resources to support the effort. The Consultant will use innovative outreach approaches that have been successful in engaging stakeholders and the public in non-traditional ways. A successful engagement plan will incorporate activities that are wide-ranging, with elements that complement each other.

The Consultant will develop a Stakeholder Engagement Plan for the safety action plan that will outline the process by which the public will be engaged throughout the development of the planning process, from inception to completion. The Consultant shall create forums for people of all abilities to offer feedback, insight and to identify resources for inclusive engagement.

The Stakeholder Engagement Plan will also focus on engaging underrepresented populations and neighborhoods to implement public health and equity goals of the plan Identification of, and engagement activities for, key communities that may be disproportionately impacted by traffic risks and traditionally underserved by safety efforts. The plan at a minimum should include:

- Specific activities for reaching identified stakeholder groups and engagement strategies that inform, involve, and empower stakeholders and the public.
- Examination of perceived safety culture and concerns in the OTO MPO area.
- The Consultant will ensure the Stakeholders Engagement Plan provides a process for reasonable access to all interested parties regarding the technical and policy information used in the preparation of the safety action plan.
- Provisions will be included for advanced notice of public involvement activities and time for public review and comment before key decisions are made.
- The Plan will identify best practices to reach underserved communities and recommend places for community meetings to meet the needs of the underserved communities.
- As part of the public outreach process, the Consultant will work with OTO staff to ensure all engagement opportunities are placed on the safety action plan website.
- The Stakeholder Engagement Plan will consider active support and involvement of OTO staff to accomplish a thorough outreach program.

After the creation of the Stakeholder Engagement Plan, the Consultant will continue to track the outreach efforts and provide a technical report on the success of the Stakeholder Engagement Plan. The tracking



will include key metrics, including the total number of events held, number of participants reached, number of responses, etc.

### **Task 3 – Community Meetings and Stakeholder Coordination**

The Consultant will prepare virtual and in-person workshops during the safety action planning process. These workshops must be held with the public, technical staff, and elected officials to solicit input regarding visioning, safety concerns, all proposed projects, and to establish the prioritization criteria.

To achieve the goal of reaching as many citizens as possible, “low-tech” points of input will be crucial to the public involvement process. While some will find digital forms of communication more convenient, some populations may not have access or ability to leverage these engagement methods. The Consultant will be expected to participate and help develop “low-tech” outreach strategies, including traditional public and town halls meetings, etc.

- The Consultant will prepare a timeline for stakeholder and public engagement activities based on Stakeholder Engagement Plan recommendations and in coordination with OTO staff and Engineering Consultant.
- Consultant will provide best communication methods for sharing information with residents and community members.
- The Consultant will prepare the necessary material, presentations, advertising, and handouts for the workshops. The Consultant will coordinate with OTO staff and engaged engineering firm to develop said materials.
- The Consultant will arrange to take notes and record verbal and documented comments from the public, staff, and elected officials. The Consultant will include a copy of these detailed records to OTO Staff for the final plan.
- The first set of community meetings is expected to occur prior to the development of the implementation plan. This meeting is intended to gauge the public’s needs on issues related to the implementation plan.
- A second set of public meetings are expected prior to the finalization of the implementation plan. This meeting is intended to provide the public with an opportunity to comment on the concepts developed by the Consultant.

The minimum required meetings include:

- Kick-off Meeting – OTO staff plus lead Consultant (1 meeting)
- Community meetings/workshops in different parts of the OTO region (7 in-person meetings). One set at the beginning of planning process and one at the end as outlined in Key Milestones.
- STAKEHOLDER Workshops (1 in-person and 1 virtual)
- Needs Assessment Workshop (1 in-person and 1 virtual)
- Individual community meetings throughout the process (Number TBD; staff-hosted meetings in-person or virtual)
- Individual update meetings with infrastructure owners and major partners throughout the process (Number TBD; staff-hosted meetings in-person or virtual). Consultant not required to attend these, but may be consulted for input and guidance, especially regarding equity populations.

## Task 4 – Develop Outreach Tools

The OTO seeks to use new and innovative public involvement strategies to reach all citizens, especially traditionally underrepresented and disadvantaged populations. While the combination of involvement activities depends on several factors including specializations of firms, innovative trends, the nature of a community and available resources, the Consultant will be expected to present a plan that incorporates a more innovative and wide-ranging list of involvement activities with elements that complement each other.

- **Social media** – The utilization of most major social media outlets such as Facebook, Instagram, X, YouTube, LinkedIn, etc. to connect with as many citizens as possible. OTO Staff can provide facts and information from plan development to support social media outreach. Consultant will produce content, short videos, pictures, and infographics for placement on various outlets.
- **Safety Action Plan webpage** – Contributing to the setup of a plan webpage by OTO Staff to be hosted within the OTO's website. This page will share relevant information about safety action plans and how to get involved. When needed, certain content can be linked to external sites such as for a survey or mapping tool. The Consultant will provide guidance for page layout to best communicate plan development, as well as links to engagement opportunities and tools.
- **Virtual participation** – The utilization of virtual webinars, workshops, and meetings to engage the public.
- **Digital surveys** – The development of two (2) digital surveys, one at the beginning of the process and another as needed later in the process. These surveys should be hosted using easy-to-use software. The surveys' question and answer options should be broad/inclusive and accurately reflect tradeoffs of choices so as not to influence the outcome in support of any predetermined desired outcome.

## Task 7 – Final Report

Consultant shall provide a final report which details the following:

- Engagement Plan
- Summary of Outreach Tools
- Description of all engagement activities including number of participants and types of participants (including web traffic or similar statistics for virtual engagement)
- Outreach efforts to inform public of engagement opportunities
- Success of engagement targeting underrepresented and non-traditional members of the public

## Equity Engagement Consultant Deliverables:

This list of deliverables is what will be incorporated into a contract with the selected public engagement consultant and is the desired outcome of the Public Engagement Scope as outlined above.

## Task 1 – Administration/Project Management

- *Personnel planning project and budget control*
- *Development and updating of project schedule and Gantt chart*
- *Plan and hold internal meetings*

- *Develop and implement a project quality assurance plan*
- *Attend and prepare meeting summaries of Action Items for monthly progress meetings, and submit monthly progress report documents, along with the monthly progress reports.*
- *Monthly updates on schedule and timeline*

#### **Task 2 – Engagement Plan**

- *Detailed list of meetings and outreach*
- *Report prior to kick off of meetings outlining engagement plan, including meetings, outreach and other strategies*
- *Monthly progress reports*

#### **Task 3 – Community Meetings and Stakeholder Coordination**

- *Community Meetings - Timeline*
- *Community Meetings - Meeting Materials*
- *Community Meetings - Meeting and workshop summaries*
- *Engagement and Outreach Technical Report*

#### **Task 4 – Outreach Tools**

- *Interactive public participation tools to gather feedback on visioning, safety concerns, and prioritization*
- *Two (2) digital surveys*
- *Raw survey data*
- *Technical Reports (2) summarizing results of each survey, including distribution methods*
- *Copies of any produced digital media for OTO use during this PLAN process or for any purpose outside of this PLAN process*

#### **Task 5 – Final Report**

- *Final report document*
- *Presentation to Board of Directors if needed*

## **IV. ADDITIONAL INFORMATION**

### **Project Contact**

During the project, the main OTO contacts will be:

Natasha Longpine, Transportation Planning Manager  
Debbie Parks, Grants Administrator

### **Public Records**

All proposals submitted in response to this RFP become the property of OTO and public records, as such, may be subject to public review after the final firm/consultant is selected.

## Federal Contracting Requirements

Any contracts resulting from this RFP will be subject to standard federal contract clauses, including, but not limited to, those found at <https://www.ozarkstransportation.org/what-we-do/requests-for-proposal>

## Equal Employment Opportunity

OTO does not discriminate in any of its programs and activities. The consultant awarded the contract for work will be required to assure that no person shall be denied employment or fair treatment, or in any way discriminated against, on the basis of race, sex, religion, age, national origin, or disability. In addition to these requirements, since federal funds will be used to finance this project, the successful consultant shall comply with all civil rights requirements applicable to transportation-related projects.



*For persons with disabilities needing reasonable accommodations please contact OTO at 417-865-3042 at least 48 hours in advance of the question deadline. If you need relay services, please call the following numbers: 711 - **Nationwide relay service**; 1-800-735-2966 - **Missouri TTY service**; 1-800-735-0135 - **Missouri voice carry-over service**.*