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|  | ***The Charter Township of Oakland, Michigan***  **Planning Commission**  **REQUEST FOR PROPOSALS**  Oakland Township Resident Opinion Survey including: respondent mailing, survey programming, hosting, data collection, tabulations and reporting. |
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**DEADLINE: Monday December 22, 2014 @ 3 p.m.**

Oakland Township Planning Commission is requesting proposals from experienced and qualified Market Research bidders to provide quantitative research proposals for a Township wide resident opinion survey. Proposals will be received by the Township interim manager until **3:00 P.M., December 22, 2014**.  **Please mail or deliver proposals to Jamie Moore, Interim Township Manager, at 4393 Collins Road, Rochester, MI 48306.**

**OAKLAND TOWNSHIP RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL BIDS AND TO WAIVE ANY IRREGULARITIES.**

**GENERAL CONDITIONS**

1. INTENT

The intent of this RFP is to select a firm to provide services required to field the survey and report findings. The survey instrument is composed and the Township will provide the resident contact list including names and addresses (e-mails not available). Some questions are identical to a survey conducted in 2003 for trending purposes. Selected vendor will be provided prior data for report creation. The findings from this survey and analysis of results will be used as input to the Oakland Township Master Plan.

1. PROPOSALS

All proposals must include the following information:

**Bidder’s Business Name and Address**

**Item: Oakland Township Resident Opinion Survey**

**PROPOSALS MUST BE RECEIVED ON OR BEFORE December 22, 2015 @ 3 P.M.**

It is the responsibility of the Bidder to ensure that the proposal arrives on time and at the right place. **Any proposals received after the above date and time will be disqualified.**

1. PUBLIC INFORMATION

All submitted proposals and information included therein or attached thereto shall become public record upon their delivery to the Township.

1. CLARIFICATION OF RFP

Any request(s) for clarification of this RFP shall be made in writing and delivered to: Jamie Moore, Interim Township Manager, 4393 Collins Road, Rochester, MI 48306 or jmoore@oaklandtownship.org.

1. RIGHT TO REJECT PROPOSALS AND WAIVE INFORMALITIES

The Township reserves the right to accept or reject any or all proposals, waive or modify proposal requirements, waive informalities, allow correction of errors or omissions, negotiate individually with one or more proponents, request supplemental proposals and/or additional information, and to select and award a contract to a qualified firm determined by the Planning Commission, in its discretion, to be in the best interest of the Township considering all factors. Members of the Planning Commission and Staff will review the proposals and make a decision to award the contract.

Any acceptance of a proposal by the Planning Commission shall not be binding on the Township and may be withdrawn for at least ten days after the date of acceptance and until the selected firm has submitted the signed contract and satisfied all insurance and other acceptance conditions. During the period of time the Planning Commission acceptance may be withdrawn, the Planning Commission reserves the right to continue to review, evaluate and investigate all proposals and firms, and for any reason approved by the Planning Commission, may withdraw the acceptance of a proposal.

1. RESPONSIVE PROPOSALS

Companies are expected to examine the RFP requirements and all instructions. Failure to do so will be at the company’s risk. Each company shall furnish all information requested herein. The person signing the proposal must initial all erasures or other changes. If any person contemplating submitting a proposal is in doubt of the true meaning of any part of the specifications or other conditions with the RFP, they are advised to e-mail and have the portion in question clarified.

1. CHANGES AND ADDENDA TO BID DOCUMENTS

Each change or addendum issued in relation to the RFP will be posted on the Township website. It shall be the contractor’s responsibility to make inquiry as to the changes or addenda issued. All such changes or addenda shall become part of the contract and all bidders shall be bound by such changes or addenda.

1. INTERVIEWS

Interviews will be scheduled if it is determined to be necessary by the Township.

1. AWARD

Competitive proposals will be evaluated based upon criteria formulated around the most important features of the service, of which qualifications, experience, and timelines may be overriding factors, and price may not be determinative in the issuance of a contract or award. The proposal evaluation criteria should be viewed as standards, which measure how well a vendor’s approach meets the desired requirements. The evaluation and award of this proposal shall be rated on the following (not in any relevant order):

* Demonstration of a clear understanding of the project.
* Evaluation of professional qualifications and capabilities of the firm and its project management and assigned personnel to perform requested services.
* Evaluation of the work plan and scheduling.
* Related experience with similar types of projects.
* Cost.
* Attention to requests and requirements of this RFP.
* Results of interview (if conducted).

The price proposed shall be considered firm and cannot be altered after receipt per the terms of this bid. The contents of this RFP and the vendor’s response will become contractual obligations if a contract ensues. Failure of the successful vendor to accept these obligations may result in cancellation of the award.

1. WITHDRAWAL OF PROPOSAL

Proposals may be withdrawn in person by a bidder, or authorized representative, provided their identity is known and a receipt is signed for the bid, but only if the withdrawal is made prior to the stated bid deadline. No proposal may be withdrawn for at least 90 days after opening except the successful bidder whose prices shall remain firm for the entire contract period.

1. EXECUTION OF AGREEMENT

If a vendor does not execute an agreement within 60 days after being notified of selection, the Planning Commission may give notice to the firm of the intent to select the next most qualified bidding firm or call for new proposals, whichever the Planning Commission deems most appropriate.

1. LIABILITY FOR COSTS

The Township is not liable for any costs incurred by firms with regard to this RFP.

1. TAX EXEMPTION

Municipalities are exempt from Michigan State Sales and Federal Excise taxes. Do not include such taxes in the proposal figure. The Township will furnish the successful bidder with tax exemption certificates when requested.

1. IRAN LINKED BUSINESS

In accordance with Michigan Public Act 517 of 2012, the Iran Economic Sanctions Act, MCL 129.311, et seq., effective date 4/1/13, all vendors must certify that they are not an “Iran Linked Business” in order to submit a proposal. The act prohibits individuals who have economic relations with Iran from submitting bids on RFP’s with the state or any other public entities. The act also includes penalty provisions for submittal of false certifications. See Attachment “B”.

**CONTRACT TERMS**

1. CONTRACT PERIOD

The selected firm will be provided with a contract commencing on approximately **February 1, 2015.**

1. CANCELLATION OF CONTRACT

The Planning Commission reserves the right to cancel any agreement at any time upon thirty (30) days prior written notice of its intent to terminate any agreement. The selected firm shall provide the Planning Commission at least ninety (90) days prior written notice of its intent to terminate any agreement.

1. INDEMNIFICATION AND HOLD HARMLESS

The Contractor shall, at its own expense, protect, defend, indemnify and hold harmless the Charter Township of Oakland, its elected and appointed officials, employees and volunteers and others working on behalf of the Charter Township of Oakland, against any and all liabilities, obligations, damages, penalties, claims, costs, charges, losses, and expenses, including without limitation: direct, indirect, incidental, consequential, special and punitive damages, fees and expenses of attorneys, expert witnesses and other consultants which may be imposed upon, incurred by, or asserted against the Township as a result of any negligent or tortuous act, error of omission of the Contractor, or any of its personnel, employees, consultants, or subcontractors, agents or any entities associated, affiliated or subsidiary to the Contractor now existing or hereafter created, their agents and employees (collectively called ‘Associates”) for whose acts any of them might be liable, including, but not limited to, any and all injury to the person or damage to the property of, or any loss or expense incurred by an employee or the Township; and any failure by the Contractor, or any of its “Associates” to perform its obligations either implied industry standards, or expressed under this Contract; and any violation of any federal, state or local statute, regulation, ordinance, permit or license by the Contractor, or any of its personnel, employees, consultants, or subcontractors, or any of its “Associates”.

The Contractor’s indemnification obligation shall not be limited in any way by any limitation on the amount or type of damages; compensation; or employee benefits. In addition, the Contractor agrees to hold the Township harmless from the payment of any deductible on any insurance policy paid or any other amount paid to the Township, or its elected and appointed officials, employees and volunteers, or by the insurance coverage obtained and/or maintained by the selected firm pursuant to the requirements of this RFP and the contract entered into.

1. INSURANCE REQUIREMENTS

The contractor shall secure and maintain during the term of this contract insurance in the types and amounts specified in Attachment A, from an insurance agency authorized to do business in the State of Michigan, whose rating is satisfactory to the Township’s Risk Management Advisor. The Contractor shall be required to provide policies evidencing the required coverage prior to execution of the contract and the policies shall include the notice of cancellation time period, naming of additional insured and endorsement language as required. See Attachment A. In addition, please attach a copy of your current insurance coverage to the bid submitted.

**ANTICIPATED SCHEDULE**

RFP Issued December 3, 2014

Proposals Due 3 pm December 22, 2014

Award Contract Approx. February 1, 2015

**PROJECT INTENT AND OVERVIEW**

The Charter Township of Oakland (a prominent suburb of metro Detroit located in the northeast corner of Oakland County, Michigan with an estimated population of 16,000+) is requesting proposals from qualified and experienced market research firms to assist the Planning Commission and staff with the respondent mailing, survey programming, hosting, data collection, tabulations and reporting of a Township wide resident opinion survey.

Oakland Township has been consistently growing and evolving during the last fifteen years as the number of housing developments, commercial facilities, park land and recreation facilities have increased.

Every 5 years the Planning Commission updates the Master Plan which documents current conditions and provides a guide for future development and desired Township initiatives. As input to this Master Plan process, the Planning Commission is commissioning a Resident Opinion Survey to better understand Township residents’ opinions concerning growth, development and Township services. This opinion survey is designed to measure resident values, desires, satisfaction and concerns. Several survey questions are identical to a previous survey fielded in 2003 and will be utilized to measure changes over time and population growth. A summary of results will be published within the next Master Plan.

To successfully complete the Opinion Survey, Oakland Township will furnish:

1. Approximately 6,000 household name and address records from the current tax role and voter registration lists ensuring high accuracy. Note, records do not include e-mail addresses.
2. A survey cover letter from the Oakland Township Planning Commission.
3. Approved questionnaire – vendor may suggest sequence, formatting or minor word changes only.
4. Prior survey data for repeat questions.
5. Suggested data tabulation banner points.
6. Input to final report formatting.

**Please note that no respondent incentive is assumed**. Planning Commission letter will stress importance and timeliness of resident participation.

**PROJECT SPECIFICATIONS**

The Charter Township of Oakland is requesting proposals from qualified and experienced market research or similar firms to assist the Planning Commission and staff with market research services pertaining to the following specifications.

1. **Research design** – quantitative resident opinion survey containing 39 total questions of which 6 are write in, 2 open ended and 31 closed. Closed questions include 5 point scaled, check all that apply, yes/no and best fit. The survey contains one map and one graphic illustration. There are no skip patterns or pop up illustrations.
2. **Questionnaire** - already composed by Township Planning Commission -- vendor may suggest changes to order or format but not content. Preliminary survey document included in attachment C. Final wording changes from the Planning Commission will be available by February 1.
3. **Sample description** – approximately 6,000 household records available including names and full addresses for current residents. Commercial properties excluded.
4. **Fielding methodology** - Paper and web based. Letter from Planning Commission will encourage residents to utilize the web based to save time and money processing respondent input. Vendor must provide mechanism to prevent multiple surveys from one household.
5. **Incentive offered** – none. Township Planning Commission will provide an introduction letter stressing importance and timeliness of return.
6. **Number of completes expected – 1,000-1,800** The previous 2003 mail only survey yielded approximately 30% return rate. It was fielded in the spring. Since it is unknown what exact percent of respondents will utilize the paper based survey, vendors are asked to quote pricing for per-survey paper data entry. A similar survey was recently fielded by the Township Parks and Recreation Commission that yielded a return ratio of 33% internet and 67% paper.
7. **Report expectations** – One simple cross tab with demographic, residential quadrant and satisfaction banner points. Planning Commission will provide suggestions, vendor may suggest others. Written report will include graphics and relevant comments for each question (include trended findings for select questions- Township to provide prior data). Planning Commission may also request graphs of possible cross tabulations for select questions. Vendors are asked to quote a per hour rate for additional analysis and cross tabulations. Simple verbatim listing of other specify and two open ended question responses. No coding of responses required. Vendor will be invited to present findings to the Planning Commission and possibly the Board of Trustees at their regularly scheduled April meetings.
8. **Timing expectations**- Bid submission – December 22; Award Contract – February 1; Survey fielding start approximately-- February 15; Final report – March 31; Planning Commission presentation – April 7, 2015.

**WORK PRODUCTS SPECIFIED FROM ABOVE SPECIFICATIONS**

At the respective stage of the research project, on acceptance of the final contract with Oakland Township, the vendor will provide the following documents:

Project Specifications Item # Final Work Products

2. Any suggested changes to survey document

4. Hosting website and password for web based survey deployment.

6. Target mail out date, total contacts, reminder notes (if req.)

7. Data tabulations, Report format, Final report

**SUBMITTAL REQUIREMENTS**

**ALL PROPOSALS MUST BE RECEIVED ON OR BEFORE December 22, 2014 @ 3 P.M.**

The proposal must contain the following information:

1. **Work Plan and Scheduling.** Statement of understanding of the general scope of services. Description of proposed approach and activities to be accomplished including scope of work, project schedules, and deliverables for each of the tasks. Include amount of time needed to complete each individual task and the time to allow staff to review and respond to submitted material. Identify how and when communication and coordination efforts with the Township will be provided.
2. **Firm History and Qualifications.** History, areas of expertise, location, size and resource capabilities to perform the required services and meet the minimum qualification requirements. Description of the firm’s experience in managing projects similar to the each component of this project. Include any details related to working with Township staff and boards and commission members. List similar projects including the following information:
3. Project name and location;
4. Brief description of project and firm’s responsibilities;
5. Preparation date;
6. Budget; and
7. Contact name, address, and phone number for client.

**3. References.** A minimum of three references from entities that received services from the firm. Oakland Township has the right to contact any of the organizations or individuals listed. Information provided shall include:

1. Client name
2. Project description
3. Project start and end dates
4. Client contact name, telephone number and email address.

**4. Cost.** Provide a not-to-exceed cost of services for completing the entire project as described in the project specifications and work products sections.

Please provide a proposed compensation schedule to include all of the following components.

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|  | **Project Component** | **Not to Exceed Fee**  **All residents** |
|  | **Resident mailing (assuming 6,000)** |  |
|  | **Survey programming and hosting** |  |
|  | **Data tabulations, final report, presentation**  **Data collection – per unit paper survey entry**  **Hourly rate for additional cross tabulations** |  |
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|  | **TOTAL FOR ALL FIXED COMPONENTS** |  |
|  | **TOTAL COST ASSUMING 1,800 COMPLETES AND 2/3 PAPER SURVEYS** |  |

**BIDDER INFORMATION**

**Firm Name:**

**Address:**

**City/State/Zip Code:**

**Telephone Number: Email Address:**

**Firm Established**: **Years in Business:**

**Type of Organization: \_ State of Organization:**

**Representative's Name:**

**Title:**

**Signature:**

**Date:**

It is agreed by the signed bidder that the signature and submission of this proposal represents the bidder’s acceptance of all terms, conditions, and requirements of the proposal specifications and, if awarded the proposal will represent the agreement between the parties.

The bidder agrees that the cost of any work performed, materials furnished, services provided, or expenses incurred, which are not specifically delineated in the proposal documents, but which are incidental to the scope, intent and completion of this contract, shall be deemed to have been included in the prices for the various items scheduled.

It is understood that all proposed prices shall remain in effect for a least **120 days from the date of the proposal opening** to allow for the award and that, if chosen the successful Bidder, the prices will remain firm through invoice.

The bidder affirms that he/she is duly authorized to execute this proposal, that this proposal has not been prepared in collusion with any other proposer and that the contents of this proposal as to prices, terms or conditions have not been communicated by the undersigned, nor by any employee or agent, to any competitor and the bidder has full authority to execute any resulting contract awarded as result of, or on the basis of the proposal.

By submission of this proposal the Bidder agrees that at the time of submittal: (1) Bidder has no interest (including financial benefit, commission, finder's fee, or any other remuneration) and shall not acquire any interest, either direct or indirect, that would conflict in any manner or degree with the performance of Bidder's services, and that (2) Bidder had no notice or knowledge of any “Conflict of Interest” that would be created by an award of a contract to Bidder A. "Conflict of Interest" shall include holding or retaining membership, or employment, on a board, elected office, department, division of bureau, or committee sanctioned by and/or governed by the Charter Township of Oakland. Bidders shall identify any interest, and the individuals involved, on separate paper with the response and shall understand that the Township, at its discretion may reject their proposal.

**ATTACHMENT A  
INSURANCE REQUIREMENTS**

The contractor shall not commence work under this contract until they have obtained the insurance required under this section. All coverage shall be with insurance companies licensed and admitted to do business in the State of Michigan. All coverages shall be with insurance carriers acceptable to the Charter Township of Oakland.

**Insurance**

1. Workers Compensation Insurance: The Contractor shall procure and maintain during the life of this contract, Workers’ Compensation Insurance, including Employers’ Liability Coverage, in accordance with all applicable statutes of the State of Michigan.
2. Commercial General Liability Insurance: Contractor shall procure and maintain during the life of the Agreement, Commercial General Liability Insurance on an “Occurrence Basis” with limits of liability not less than $1,000,000 per occurrence and/or aggregate combined single limit, Personal Injury, Bodily Injury, Bodily Injury and Property Damage. Coverage shall include the following extensions: (a) Contractual Liability; (b) Products and Completed Operations Liability with limits of liability not less than $1,000,000; (c) Independent Contractors Coverage; (d) Broad Form General Liability Extensions or equivalent; (e) Deletion of all Explosion, Collapse and Underground (XCU) Exclusions, if applicable.
3. Motor Vehicle Liability: Contractor shall procure and maintain during the life of this Agreement Motor Vehicle Liability Insurance, including Michigan No-Fault Coverages, with limits of liability of not less than $1,000,000 per occurrence combined single limit Bodily Injury and Property Damage. Coverage shall include all owned vehicles, all non-owned vehicles, and all hired vehicles used in the performance of the work assistance and other professional services to be performed under this Agreement.
4. List Township as Additional Insured/Certificate Holder on Commercial General Liability and Motor Vehicle Liability Insurance:

Charter Township of Oakland

4393 Collins Road

Rochester, MI 48306

1. Additional Insured: Commercial General Liability and Motor Vehicle Liability Insurance, as described above, shall include an endorsement stating the following shall be Additional Insureds: “The Charter Township of Oakland, and all elected and appointed officials thereof, all employees, agents and volunteers thereof, and all boards, commissions and/or authorities thereof, including all members, employees, agents and volunteers thereof.”
2. For all contracts over $600, also include a completed W9.
3. All sole proprietors must submit a completed and notarized Sole Proprietor Form.

**ATTACHMENT B**

**VENDOR CERTIFICATION  
THAT IT IS NOT AN  
“IRAN LINKED BUSINESS”**

Pursuant to Michigan law, (the Iran Economic Sanctions Act, 2012 PA 517, MCL 129.311 et seq.), before accepting any bid or proposal, or entering into any contract for goods or services with an prospective Vendor, the Vendor must first certify that it is not an “IRAN LINKED BUSINESS”, as defined by law.

Vendor:

Legal Name:

Street Address:

City:

State and Zip:

Corporate ID # /State:

Taxpayer ID #:

The undersigned, with: 1) full knowledge of all of Vendors business activities, 2) full knowledge of the requirements and possible penalties under the law MCL 129.311 et seq., and 3) the full and complete authority to make this certification on behalf of the Vendor, by his/her signature below, certifies that: the Vendor is NOT an “IRAN LINKED BUSINESS” as required by MCL 129.311 et seq., and as such that Vendor is legally eligible to submit a bid and be considered for a possible contract to supply goods and/or services to Charter Township of Oakland.

Signature of Vendor’s

Authorized Agent:

Printed Name of Vendor’s

Authorized Agent:

Witness Signature:

Printed Name of Witness:

**ATTACHMENT C**

**RESIDENT OPINION SURVEY DOCUMENT**