

South Carolina Department of Transportation – Update Access and Roadside Management (ARMS) Manual

Intent:

The Intent of this Request for Proposal (RFP) is to procure a Consultant to update the South Carolina Department of Transportation's (SCDOT) Access and Roadside Management Standards (ARMS) manual.

Background Information:

Access Management (AM) is the proactive management of vehicular access points to land parcels adjacent to all manner of roadways. Good access management promotes safe and efficient use of the transportation network. AM encompasses a set of techniques that state and local governments can use to control access to highways, major arterials, and other roadways. AM provides an important means of maintaining mobility and calls for effective ingress and egress to a facility, efficient spacing and design to preserve the functional integrity, and overall operational viability of street and road systems. The benefits of AM include improved movement of traffic, reduced crashes, and fewer vehicle conflicts. AM includes several techniques that are designed to increase the capacity of the roads, manage congestion, and reduce crashes.

SCDOT developed the Access and Roadside Management Standards to establish uniformity for encroachments upon roads on the South Carolina Highway System to provide for the safe and efficient movement of traffic while allowing reasonable access to abutting property. The ARMS manual is not intended to present all of the information that is needed by a permittee or designer; however, this manual does provide a majority of the information needed for encroachments onto the State Highway System.

The SCDOT ARMS manual can be accessed using the link below:

<https://www.scdot.org/business/access-management.aspx>

The Consultant shall assume primary responsibility for general supervision of the Consultant employees and his/her or their sub-consultants for all work performed and shall be solely responsible for all procedures, methods of analysis, interpretations, conclusions, and contents of work performed under this solicitation. The Consultant shall act in an independent capacity and not as employees for SCDOT. Whenever necessary to perform work in the field particularly with respect to reconnaissance, the Consultant will endeavor to maintain good relations with the public and any affected property owners. Personnel employed by or representing the Consultant shall conduct themselves with propriety.

All images, documents, and graphics produced as part of this solicitation shall be produced with the highest quality graphics and presented in a manner that is clear and easily understood by the general public. All materials will be provided in Microsoft Word or Excel unless otherwise agreed upon between SCDOT and Consultant.

The Consultant shall meet or exceed the scope of work/specifications listed below.

Scope of Work/Specifications:

The Scope of Work for this project consist of providing technical assistance to SCDOT for the update of the SCDOT Access and Roadside Management Standards (ARMS) manual. The Consultant shall meet or exceed the specifications listed below.

Schedule of Tasks:

Task 1 – Project Management Plan, Kickoff and Monthly Meetings, Invoices, and Progress Reports

Task 2 – Develop and Manage Interdisciplinary Stakeholder Team

Task 3 – Conduct a Review of Policies, Practices, and Interviews

Task 4 – Draft and Final updated ARMS manual

This project shall be completed within one (1) year of the Notice to Proceed (NTP) and the schedule provided is an estimate and dates are contingent upon the NTP date, data access, stakeholder availability, and SCDOT review times.

Technical Scope of Work by Task:

The Consultant will manage all sub-consultants (if utilized) and manage the work effort including regular communications, teleconferences, management of schedule, and invoicing.

Task 1 – Project Management, Kickoff Meeting, and Monthly Meetings

1.1 Project Management Plan

The Consultant will manage the project scope of work, develop and monitor a budget and schedule, prepare invoices, and maintain communications with the project team. The Consultant will work closely with the SCDOT Program Manager and stakeholders throughout the course of this project to ensure the project and updates meet the expectations and complete all tasks.

The Consultant will submit a draft Project Management Plan (PMP) to document how the project will be carried out by the Consultant to include the project schedule, project communication, monthly status, stakeholder meetings, document submission, and review. The PMP shall include a schedule for all tasks and deliverables, Consultant key personnel, communication and submittal protocols. The draft PMP shall be submitted to the SCDOT Program Manager for review within ten (10) business days of the issuance of the Notice to Proceed (NTP). The SCDOT Program Manager will provide comments to the Consultant within ten (10) business days of receiving the draft. If any revisions, additions, amendments, changes, etc. need to be completed the Consultant will update the draft PMP within five (5) business days and provide the final version PMP at the Kickoff Meeting.

1.2 Kickoff and Subsequent Monthly Meetings

The Consultant will hold a kickoff meeting with the SCDOT Representatives within 30 business days of the issuance of the NTP. The Consultant Principal-in-Charge, Project Manager, and Deputy Project Manager will attend the kickoff meeting via videoconferencing arranged by the Consultant. Additional Consultant staff may be included as deemed necessary by the Consultant. The Consultant will work with SCDOT Program Manager to schedule the kickoff meeting. All subsequent monthly status meetings will be conducted via videoconferencing/remotely.

The kickoff meeting will initiate the project and review the scope of work, tasks, schedule, data needs, stakeholder membership, and project expectations. The Consultant will take advantage of this opportunity to engage the SCDOT Representatives through high-level discussion on the project tasks and expectations, as well as key areas of operational concerns.

The Consultant will prepare all meeting materials and will submit those electronically via email (in Microsoft Word) to the SCDOT Program Manager within five (5) business days prior to the meeting. The Consultant will submit meeting minutes electronically via email (in Microsoft Word) to the SCDOT Program Manager no later than ten (10) business days after the conclusion of the meeting. Items to be discussed during the kickoff meeting include: Project Management Plan, Task Overview, and Stakeholder Team.

1.3 Monthly Progress Reports and Invoicing

The Consultant will submit a brief monthly progress report accompanying the invoice for each reporting period in electronic format. The report will contain concise statements covering relevant activities, including a clear and complete amount of the work performed under the project, by task; an outline of the work to be accomplished and expected meetings/teleconferences during the next reporting period; a description of any problems encountered or anticipated that will affect the completion of the project within the time and fiscal constraints as established, together with recommended solutions to such problems; or, a statement that no problems were encountered; a table with current and cumulative expenditures versus planned expenditures for each task; and a chart depicting the schedule and overall progress against same. Any deviations will be documented in the monthly progress reports.

The Consultant shall submit invoices in a format acceptable to SCDOT with all the necessary documentation required for payment. Invoices shall be submitted monthly and invoices shall contain the following information:

- Contract Number:
- Invoice Number:
- Payment Number:
- Contract Amount:
- Paid to Date:
- Total Invoiced to Date:
- Less Previous Payments:
- Total due this Invoice:

The Consultant shall notate invoice “I certify invoice (insert invoice number) to be true and correct.” This statement shall be signed by the Consultant.

Deliverables for Task 1:

- 1.1 Draft PMP including draft project schedule
- 1.2 Kickoff Meeting, Final PMP, Monthly Meetings, and Minutes
- 1.3 Monthly Progress Reports and Invoices

Task 2 – Manage Interdisciplinary Stakeholder Team

A core stakeholder team will be formed as part of the ARMS manual update process. The role of the stakeholder team will be to review preliminary documents, provide comments, and represent their respective organizations as the plan is developed. The Consultant will provide preliminary documents to SCDOT Program Manager within five (5) business days of the scheduled Stakeholder Team meetings.

2.1 Stakeholder Meetings

The Consultant will facilitate three (3) stakeholder team meetings via videoconferencing. The Consultant will also be responsible for preparing all meeting materials and documenting meeting outcomes. SCDOT will provide contact information for members of the stakeholder team. The Consultant will be responsible for performing outreach to the stakeholder team via email communications.

The Consultant will prepare all meeting materials and will submit those electronically via email (in Microsoft Word) to the SCDOT Program Manager within five (5) business days prior to the meeting. The Consultant will submit final meeting minutes electronically via email in Microsoft Word to the SCDOT Program Manager for file documentation no later than five (5) business days after the conclusion of the meeting.

SCDOT Program Manager will provide a final list of preferred stakeholder team members. Possible stakeholder team members include representatives from the following:

- Federal Highway Administration South Carolina Division Office
- Local Government Representatives
- Municipal Government Representatives
- SCDOT District Encroachment Permit Engineers
- SCDOT District Traffic Engineers
- SCDOT Maintenance
- SCDOT Traffic Design
- SCDOT Traffic Operations
- SCDOT State Encroachment Permit Engineer

The stakeholder team meetings will cover the following topics:

Meeting 1:

Introduction – discussion of South Carolina ARMS manual; an explanation of the ARMS update process, stakeholder roles, project timeline, and deliverables. The first stakeholder meeting will take place within twenty (20) business days after the kickoff meeting.

Meeting 2:

Results of Interviews – South Carolina Policy Review and Encroachment Permit Policy Reviews (from Georgia and North Carolina)

Meeting 3:

Conclusions – presentation of final ARMS manual update and discuss next steps.

Deliverables Task 2:

2.1 Stakeholder team agendas, meeting materials, and meeting notes

Task 3 – Conduct a Review of Policy and Practice*

***Task 3 will be initiated within five (5) business days of the kickoff meeting or within 30 business days of issuance of NTP whichever occurs first.**

The Consultant will evaluate SCDOT departmental directives, engineering directives, design manuals, and latest version of the ARMS manual, and encroachment permit policies. The Consultant will also conduct a review of Georgia and North Carolina's Department of Transportation encroachment permit policies.

3.1 SCDOT Interviews

The Consultant will interview SCDOT Staff who oversee, review, and approve SCDOT encroachment permits from the following offices and additional SCDOT staff as directed by the SCDOT Program Manager:

- SCDOT District Encroachment Permit Engineers
- SCDOT District Traffic Engineers
- SCDOT State Encroachment Permit Engineers
- SCDOT Traffic Operations Engineers

3.2 Other Governmental Agencies and Industry Interviews

The Consultant will also conduct interviews with other governmental agencies as well as conduct an industry review for current state of practice. At least one (1) Stakeholder shall be interviewed from a large County and one (1) Stakeholder shall be interviewed from a large Municipality to identify challenges with the latest version ARMS manual from a local level perspective. The SCDOT Program Manager will assist the Consultant on Stakeholders to interview.

SCDOT Program Manager will assist in identifying appropriate representatives from other state agencies and associations to identify challenges with the current ARMS manual and Consultant scheduling of interviews. Interviews will include discussion about access management.

3.3 Conduct a Review of Encroachment Permit Policies in Georgia and North Carolina

The Consultant will conduct a review of policies and/or guidelines for encroachment permits at Georgia Department of Transportation and North Carolina Department of Transportation. The purpose of this review will be to identify major differences in policies and/or guidelines and the permitting processes between Georgia, North Carolina, and South Carolina. The Consultant shall utilize all the information gathered to assist in the recommended revisions to update the current ARMS manual.

The Consultant will have 30 business days to conduct all interviews and reviews and ten (10) business days after all interviews and reviews have been completed to issue a draft alignment report to SCDOT Program Manager. SCDOT Program Manager will prepare comments for the Consultant within twenty (20) business days of receipt. The Consultant will then have five (5) business days to deliver the final alignment report. The report will include, at a minimum, recommendations updated SCDOT policies for the ARMS manual.

Deliverables for Task 3:

- 3.2 Draft and final alignment report for SCDOT encroachment permit policies, encroachment permit policies in Georgia and North Carolina, and a summary of interviews
- 3.3 Draft a report with recommendations for ARMS manual revisions based on final alignment report.

Task 4 – Final Updated ARMS Manual

4.1 Produce updated ARMS manual

The Consultant will use latest edition of the ARMS manual, final alignment report, and draft recommendations report to produce an updated ARMS manual document, provide to SCDOT Program Manager for review and make revisions based on feedback received. Revisions shall be provided to SCDOT Program Manager with ten (10) business days. This will be an iterative process.

Deliverables for Task 4:

4.1 Draft updated and final updated ARMS manual

Each submittal shall include the following information:

1. Standard Federal Form 330
2. The name and contact information, to include email, of the primary contact.
3. Certification stating whether the business is or is not a South Carolina resident.
4. Information responsive to the selection criteria
5. Submittals shall not exceed 20 double-sided pages, to include letter of interest and the covers, which shall be soft – no hard notebooks.
6. The Standard Federal Form 330 shall not be included in the 20 double-sided page count.
7. To be considered for selection, persons or firms must be properly licensed in accordance with the requirements of Title 40 of the South Carolina Code of Laws, as amended, at the time of resume submission.

Evaluation Factors

Qualifications (35 Points)

1. Demonstrate successful and particularly recent experience of the team on similar projects. Include a list of states where the members of the team have completed similar projects.
2. Demonstrate expertise in specialized areas required for this project.
3. Demonstrate the ability of professional staff to complete the project.
4. References submitted with proposal.

Technical Approach (30 Points)

1. Demonstrate a clear understanding of the effort and products required.
2. Explicit consideration of the features listed in the Scope of Work.
3. Innovations or efficiencies to be used in completing the project with descriptions of how they add value to the project and approach to developing an updated SCDOT ARMS manual.
4. Quality, clarity, and thoroughness in addressing required tasks and submission guidelines. The proposal adheres to the document organization and content requested in the RFP. The content has been reviewed and is free of distracting spelling, punctuation, and grammatical errors.

Project Management (20 Points)

1. Demonstrate an ability to perform needed tasks and meet stated completion date.
2. Demonstrate the ability to complete project within the schedule stated in this document.
3. Provide recent, current, and project workloads of the firm.

Resources (15 Points)

1. Availability of personnel and any resources needed to successfully complete the project.
2. Staffing plan demonstrates staff (particularly Project Manager) ability to successfully complete the project and to include a listing of each key team members' current and projected workload.
3. Resumes shall reflect a team comprised of staff with experience successfully implementing similar projects that includes technical writers and graphic designers (with the ability to produce quality graphics and data visualizations).

Maximum Contract Period: One (1) Year from the issuance of Notice to Proceed