

**Request for Proposals**  
**Total Project Management**  
**for**

**Development of the Ontario Traffic Manual Book 15:**  
***Pedestrian Protection and Control***

**March 3, 2009**

**Revised: March 13, 2009** (revisions in **yellow** highlights)

Written questions and replies added on March 30, at the end of the RFP in **RED** text

**Ontario Traffic Conference**

Sections of the Request for Proposals (RFP) document and the Proposal response constitute the Schedules to the Total Project Management (TPM) Legal Agreement as follows:

Section A: General Information and Instructions	
Section 1: Project Description	Schedule 1
Section 2: Project Schedule	Schedule 2
Section 3: Management Plan	Schedule 3
Section 4: Detailed Plan	Schedule 6
Section 5: Financial Proposal	Schedule 10
Section 6: Insurance Requirements	
Section 7: Technical Standards and Specifications	Schedule 11
Section 8: OTC Acceptance/Approvals	

When the assignment is awarded, the successful Consultant's Proposal and sections of the RFP, appended to the TPM Legal Agreement, will form the TPM Legal Agreement between the Ontario Traffic Conference (OTC) and the TPM Consultant.

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**--END OF RFP--**

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## **Section A: General Information and Instructions**

### **A.1 Intent of the RFP**

The purpose of the Request for Proposals (RFP) is to initiate the process for companies to submit a Proposal for furnishing all professional and technical services for the creation of Ontario Traffic Manual Book 15: Pedestrian Protection and Control (the "Total Project Management (TPM) Services").

A more detailed description of the Project scope and requirements is set out in Sections 1 and 4 of this RFP.

### **A.2 RFP Documents**

This RFP package consists of the following documents:

1. RFP defining the proposal and selection process, the Project scope and criteria for the performance of services;

Each Proponent must satisfy itself as to the sufficiency of the information presented and obtain any updating or additional information, and perform any studies, analysis or investigations the Proponent deems necessary in order to deliver the requirements of this Project.

In the event of conflicts or inconsistencies among the Reference Documents, documents with the most recent date shall prevail. This RFP document takes precedence over all Reference Documents. Where there are any inconsistencies between this RFP and any of the Reference Documents, this RFP shall prevail.

All requirements, designs, documentation, plans and information viewed or obtained by the Proponent in connection with this RFP are the property of the OTC and must be treated as confidential and not used for any other purpose other than replying to this RFP and the fulfillment of any resulting Agreement. Upon request of the OTC, all such designs, documents, plans and information shall be returned to the OTC.

### **A.3 Relationship between RFP Documents**

The submission requirements of the RFP are defined in Sections 2 through 8. The response to the RFP is structured to consist of a number of Plans describing the Proponent's approach, and the proposed Project Schedule. Each Section and proposed Plan are numbered to correspond with the Schedules to the TPM Legal Agreement (sometimes referred to throughout this document as the "TPMA"), listed in Section 1.4 of the TPMA.

Upon selection of the successful Proposal, selected components from the RFP document and the Proposal response will be appended to the TPMA. The sections so noted throughout this RFP, and the proposed Plans submitted by the Proponent will become the Schedules to the TPMA. This combination will then represent the document signed by the OTC and the successful Proponent. If there is a discrepancy between the RFP document and the Proposal, the RFP document will prevail.

#### A.4 Proposal Process

The Proponent shall submit its Proposal for performing the TPM Services on the basis of the requirements of the RFP and upon the Proponent's further investigations and careful consideration of the content of the Reference Documents supplied by the OTC and those referenced in the RFP Documents.

Each Proponent shall be solely responsible for examining all the RFP documents, including any addenda issued during the RFP period, and shall be deemed to have satisfied itself of the sufficiency of its Lump Sum Price for the TPM Services.

Each Proponent shall review all the RFP documents, and shall promptly report and request clarification of any discrepancy, deficiency, ambiguity, error, inconsistency or omission contained therein.

Any such request must be submitted to the OTC in writing, prior to 4:00 p.m., March 23, 2009.

Addressed to:

OTC  
6355 Kennedy Road, Unit 2  
Mississauga, ON L5T 2L5

Fax: (647) 346-4060

Attention: Marco D'Angelo, Executive Director

Proponents shall not make verbal inquiries of OTC staff with respect to this RFP other than as described in this section. Information given orally by OTC staff will not be binding on the OTC, nor will it be construed as a factor in the evaluation of the Proposals.

The OTC reserves the right to revise the RFP up to the Proposal Due Date.

All Proposals shall be prepared by and at the expense of the respective Proponent.

Staff changes by the successful Proponent during the assignment will require written approval from the OTC, prior to any such change. The qualifications and experience of the proposed staff must be equivalent or better to the staff proposed at the RFP phase. Failure to comply may result in the termination of the assignment.

#### A.5 Proposal Time Schedule

The OTC reserves the right to modify the schedule, or cancel this RFP for any reason without incurring any liability for costs, losses or damages incurred by any company invited to participate in the Proposal phase.

The anticipated schedule for the RFP phase of the Project is as follows:

- |                |   |  |
|----------------|---|--|
| March 3, 2009  | - | Distribution of RFP Documents  |
| March 12, 2009 | - | Bidders Meeting at 1:00 pm OTC office, 6355 Kennedy Road Unit 2, Mississauga Ontario |
| March 16, 2009 | - | Revised RFP issued at 4:00pm   |
| March 25, 2009 | - | All written inquiries to be sent to OTC by 4:00 pm                                   |

	March 30, 2009	-	OTC will post responses to inquiries on OTC website at 4:00pm
	April 6, 2009	-	Closing of RFP: Proposal Due Date.
	May 4, 2009	-	Conditional Award Date
	May 15, 2009	-	Anticipated Award Date (Signed Agreement)
	June 9, 2009	-	Start – Up meeting in Kingston, ON

All Proposals shall be valid for 90 days following the Proposal Due Date.

The Lump Sum Price(s) is valid for a period of 90 days only unless all proponents explicitly agree to extend their Lump Sum Price(s) for a longer period. Otherwise, all proponents may be requested to resubmit the Financial Proposal.

#### **A.6 Submission of Proposals**

Proposals consisting of five (5) copies of the Technical & Management Proposal (marked Envelope #1) and **one** copy of the Financial Proposal (marked Envelope #2) must be submitted in accordance with Sections 2 through 8. The OTC will receive proposals no later than 4:00 p.m., April 6, 2009, at the following address:

Addressed to:  
 OTC  
 6355 Kennedy Road, Unit 2  
 Mississauga, ON L5T 2L5  
 Fax: (647) 346-4060  
 Attention: Marco D'Angelo, Executive Director

Failure to submit by the time and date specified would result in disqualification of the submission. Late submissions will not be accepted and will be returned unopened. The Proponent alone bears the responsibility for ensuring delivery of the submissions to the above address by the stipulated closing date and time.

Each Proposal package must be marked on the outside with the following:

OTC Executive Director Marco D'Angelo

Project Description	BOOK 15
Consultant Assignment Number:	OTCBK15

Proponent's name and address	_____
Signature (Company Authority)	_____
Date	_____

**"CONFIDENTIAL"**

All pages of the proposal (excluding staff resumes) shall have a header clearly indicating the Proponent's Name.

The OTC office is open to receive proposals between 8:30 a.m. and 4:30 p.m. Monday to Friday (excluding Civic Holidays). Proposals will be dated and time stamped upon receipt. It is each Proponent's sole responsibility to see that its Proposal is received on time. **Any proposals submitted after the submission closing date/time will be returned unopened** to the respective Proponent. All proposals must be signed. No fax transmissions will be accepted.

No alteration to the Proponent's Proposal will be accepted after the Proposal Due Date, except as provided for herein. A Proposal may be withdrawn by the Proponent by means of a written request delivered to the above noted address prior to the Proposal Due Date.

#### **A.7 Clarifications**

The OTC may elect to solicit further information from one, some, or all Proponents to clarify and support the information provided in the written submission.

#### **A.8 Non-collusion**

A Proponent **shall not discuss or communicate** with any other Proponent about the preparation of their Proposals. Each Proponent shall ensure that its participation in the RFP process is conducted fairly and without collusion or fraud.

#### **A.9 Proposal Evaluation Process and Award**

The Proposal submission is to consist of two envelopes as described in Section A.12. Envelope #1 will contain the Technical and Management Proposal and Envelope # 2 will contain the Financial Proposal. Upon receipt of each Proposal submission, the OTC will separate the two envelopes. The Financial Proposals will remain sealed until the Technical and Management evaluations are completed.

Each submission will first be examined to determine if it meets the mandatory requirements (i.e., has the information been submitted in the manner specified in Section A.12 and all the requirements of Sections 2 through 8 have been satisfied).

A determination of non-compliance (omitted or unacceptable items) may result in disqualification of the submission from further consideration, in which case the Financial envelope will be returned to the Proponent unopened. The Proponent understands and agrees that the OTC may, if deemed necessary, verify any information provided in any proposal. It must be clearly understood that if there is any evidence of misleading or false information having been given, the OTC may, in its sole discretion, reject the proposal.

Each Technical and Management Proposal will be scored in accordance with the following relative weighting:

Schedule/Plan	Maximum Score	Minimum Score	Schedule Number (Section 1.4 of the TPMA)
<b>1/ Corporate Experience (total 50 points)</b>			
1.1/ Experience of Consultant key individuals on similar projects	50	20	
<b>2/ Project Team (total 300 points)</b>			
2.1/ Project Manager - Qualifications, Knowledge, Experience	175	60	
2.2/ Key Members - Qualifications, Knowledge, Experience	125	60	
<b>3/ Project Organization (total 225 points)</b>			
3.1/ Management Plan	125	60	3
3.2/ Co-ordination of Team	50	20	
3.3/ Project Schedule	50	20	2
<b>4/ Project Methodology/Detailed Plan (total 325 points)</b>			
4.1/ Consultant's Approach to Scope of Work and Deliverables	275	160	
4.2/ Innovative approach to project	50	0	
<b>TOTAL SCORE</b>	900	400	

The individuals components within each plan/schedule will be reviewed and scored based on the following:

0/10 = does not meet requirements

4/10 = addresses requirements

7/10 = exceeds requirements

10/10 = exceptional

**Note: Scores may be allocated as any whole number between 0 and 10.**

Where the results of the Technical and Management Proposal evaluation indicates an acceptable submission (meet the minimum score identified in the table above), the Financial Proposals pertaining to that submission will be opened. The Financial Envelopes of qualified submissions will be examined to confirm mandatory requirements have been met. A determination of non-compliance may result in disqualification of the submission from further consideration.

The lowest bid price will receive 100 points. All bid prices above that value will be prorated by the percent difference from the lowest bid price.

Examples of the price bid points allocation:

Bid A = \$250,000 with a technical score of 800 points

Bid B = \$325,000 with a technical score of 850 points

Bid C = \$300,000 with a technical score of 830 points

Bid D = \$275,000 with a technical score of 840 points

Price Score:

Bid A is the lowest bid price so it receives 100 points

Bid B receives  $100 - 30 = 70$  points  $(100 - (\$325,000 - \$250,000)/\$250,000 \times 100)$

Bid C receives  $100 - 20 = 80$  points  $(100 - (\$300,000 - \$250,000)/\$250,000 \times 100)$

Bid D receives  $100 - 10 = 90$  points  $(100 - (\$275,000 - \$250,000)/\$250,000 \times 100)$

Total Score:

Bid A =  $800 + 100 = 900$  points

Bid B =  $850 + 70 = 920$  points

Bid C =  $830 + 80 = 910$  points

Bid D =  $840 + 90 = 930$  points

Bid D is the successful proponent

The total score will consist of the technical and management Score added to the prorated price score.

The successful proponent will be the one with the highest total score.

If a Proposal does not meet the Technical & Management requirements (i.e., scored below the Minimum Score as described in the above Table), the Proponent will be disqualified and the Financial Envelope will be returned unopened.

Upon conditional award, any additional clarifications required of the conditionally awarded Proposal will be resolved with the Proponent.

The award of an assignment to a successful bidder is subject to the OTC approvals required. The acceptance of a proposal and the award of this assignment will be made in writing and only in writing. The successful Proponent will be required to enter into and duly execute a written contract with the OTC in the form attached hereto or referenced herein within **five** business days or such longer time period as is referred to in the written notice given by the OTC that the contract is ready for execution.

In the event that a successful Proponent fails or refuses to enter into and duly execute the written contract within the prescribed time, the OTC reserves the right, at its sole discretion, exercising reasonably, to award the Assignment to another Proponent, not to accept any proposal, or to call for a new proposal, and the defaulting Proponent shall be liable for all losses, damages, costs and expenses (including consequential losses and damages, and legal fees on a solicitor and client basis) suffered or incurred by the OTC as a direct or indirect result thereof, including but not limited to any increase in the price of performance over the price submitted by the defaulting Proponent in its proposal.

Once a TPM Legal Agreement has been signed, the OTC will, if requested and as time and resources permit, may debrief each Proponent relative to its submission and evaluation results.

In the event that any proposal is not accepted, the OTC will not be liable for any costs or damages incurred by any Proponent including, without limitation, any expenses incurred in the preparation and submission of the Proposal.

**A.10 Payment for TPM Services**

The payment for TPM Services is described in Section 5. As part of the Financial Proposal, the Proponent shall submit the:

**PAYMENT SCHEDULE FORM****TABLE 1: SUMMARY OF PROJECT LUMP SUM COSTS (located on page 25)**

These documents, which comprise the "Payment Schedule" set out in Section 5, will become Schedule 10 to the TPMA.

**A.11 Notice to Proponents**

The OTC reserves the right to visit the office of the TPM Consultant or Sub-Consultant, to conduct an independent audit of the work currently completed. The TPM Consultant shall ensure that the Assignment records are maintained and available for review at the time of such audits.

The OTC will monitor the timeliness and quality of the services/deliverables over the course of this assignment. The monitoring may involve items such as adherence to technical standards, value for money, adherence to the Quality Control of TPM Services Plan and the Terms of References.

**A.12 Proposal Documents to Be Submitted**

The Proposal shall be submitted as follows:

- A separate Envelope #1 is to contain the Technical and Management Proposal and must include all information defined in the appropriate Sections 2 through 4 and 6;
- Envelope #2 is to contain the Financial Proposal including all information described in Section 5.

## **Section 1: Project Description**

The Terms of Reference for the Project Description shall become Schedule 1 to the TPMA.

### **1.1 Terms of Reference**

The Ontario Traffic Manual (OTM) Book 15, Pedestrian Protection and Control will be the primary document used by the Ontario Ministry of Transportation and municipalities in Ontario and contains information on legal requirements, standards, best practices, procedures, guidelines and recommendations for the planning, justification, design, timing and operations of pedestrian safety and controls. The purpose of this RFP is to acquire the services of a Consultant to create the Ontario Traffic Manual Book 15.

The creation of OTM Book 15 will incorporate recent research, concepts, innovations, new methodologies, design concepts, new devices and procedures.

Book 15 will bring together the application of all signing, devices and markings pertaining to pedestrian control and protection that are provided in different books of the OTM and will consider others identified through a jurisdictional scan to **consider information outside of the OTM series**. The Book will be based on the fundamental principles behind pedestrian control and protection, including right-of-way conflict resolution between pedestrians and other road users, speed and size differences between road users, the need for special protection of certain classes of pedestrians (e.g., school children, the elderly, limited mobility). The development of Book 15 will consider signing, devices and markings targeted at pedestrians themselves, as well as other road users that impact the safety of pedestrians, e.g., vehicles, bicycles, in-line skaters.

The manual will be developed in such a way that an electronic version will be available complete with key words providing hyperlinks to relevant sections within the manual to allow a user to move around the electronic document more efficiently.

A consultant will be retained to perform the tasks of this project and will consult with a technical steering committee consisting of traffic and pedestrian experts from MTO, the OTC and from selected municipalities in Ontario who will guide the consultant throughout the project.

Issues to be considered in creating Book 15 include recommended changes to the Ontario Highway Traffic Act (HTA) with respect to pedestrian rights, obligations and right-of-way rules. Other issues to be considered in HTA amendments include pedestrian crossovers and community safety zones.

#### **1.1.1 Project Background**

The scope of work includes the performance of all work necessary or appropriate for the Consultant to deliver the Project as provided in the TPMA. The list of tasks outlined in this Terms of Reference is intended to serve as a guide in developing a comprehensive list of work required for the assignment. It should not be taken as all-inclusive.

The Ontario Traffic Manual (OTM) is a Traffic Engineering publication that is currently under development as a series of books to provide practical guidance and application information in the fields of traffic engineering, operations and management. Book 15, Pedestrian Protection and Control will contain information on the application of all signing, devices and markings pertaining to pedestrian control and

protection that are provided in different books of the OTM. Based on the fundamental principles behind pedestrian control and protection, including right-of-way conflict resolution between pedestrians and other road users, speed and size differences between road users, the need for special protection of certain classes of pedestrians (e.g., school children, the elderly, limited mobility). Consider signing, devices and markings targeted at pedestrians themselves, as well as other road users that impact the safety of pedestrians, e.g., vehicles, bicycles, in-line skaters.

A consultant will be retained to perform the tasks of this project and a technical steering committee consisting of traffic and pedestrian experts from the OTC, MTO and from small, medium and large municipalities will guide the consultant throughout the project

## **Section 2: Project Schedule**

The Terms of Reference and the successful Proponent's Project Schedule shall become Schedule 2 to the TPMA. The Project Schedule is described in Section 4.2.5

### **2.1 Mandatory Schedule Reporting**

The TPM Consultant shall update the project schedule and Microsoft (MS) Project chart, as described in Section 2.2, monthly and provide the updated schedule to the OTC along with a status report of the progress of the project. The updated MS Project chart shall show the actual start and end dates for activities along with the original schedule dates and any revised dates.

#### Mandatory Meetings

All meetings shall be arranged with each individual team members and chaired by the TPM Consultant. Meeting dates are to be such that required team members are available. The TPM Consultant Project Manager shall be present at all meetings including meetings with sub-consultants. An agenda and a copy of the documents and plans to be discussed shall be supplied to each member of the OTC's Project Team, a minimum of five **business** days prior to the meeting. The TPM Consultant shall provide sufficient staff at all meetings to ensure that the proceedings are not unduly delayed for the purposes of taking minutes. Minutes shall be prepared for all meetings within five business days and distributed in hard copy or e-mail as agreed to by the OTC to all attendees, all team members and any invited persons that could not attend, and as necessary, make the appropriate changes, additions and deletions.

### **2.2 Proposal Instructions**

The proposed Project Schedule shall conform to the requirements set out in Section 2.1. The schedule shall be in MS Project chart form and include, as a minimum, the activities and dates in Section 2.1 and other specified dates in Section 4.2.5 of this RFP.

**NOTE: No work by the TPM Consultant shall be planned to start before the Award Date in Section A.5 of this RFP.**

The Proposed Project Schedule shall depict the entire Project showing the major milestones in the process from TPM Project award through to submission of the deliverables as outlined in Section 4.2.5.

### Section 3: Management Plan

The Terms of Reference and the Successful Proponent's Management Plan shall become Schedule 3 to the TPMA.

#### 3.1 Terms of Reference

The key individual identified as responsible for Overall Project Management (Project coordination, cost and schedule control, etc.) shall have:

- a) Proven ability to manage projects of similar size and nature and to deliver completed quality work on time and within budget;
- b) Proven ability to coordinate a multi-disciplinary team on projects of similar size and nature; and
- c) Authority to act on behalf of the company.

#### 3.2 Proposal Instructions

The proposed Management Plan shall include the following:

- a) Organizational chart for the project indicating all staff or organizations (sub-consultants) and their reporting relationships for all project activities inclusive of the following activities:
  - i) all components of the assignment
  - ii) in-house quality control and assurance of TPM Services
- b) Identification of the key individual responsible for Overall Project Management. **Provide a resume of the Overall Project Manager** that highlights: relative experience and past performance on projects of similar scope and complexity.
- c) Identification of the key individuals responsible for each of the individual Sub-areas. Provide resumes of the key individuals that highlight relative experience and past performance on projects of similar scope and complexity.

Do not provide staff resumes/information for support staff proposed for this assignment in this section.

- d) The Proponent shall submit a narrative that includes:

- The Proponent's understanding of the assignment,
- The role and level of involvement of its key individuals in similar types of projects (including the owner's name, the name of a contact person, and a phone number to facilitate verification by the OTC),
- A discussion of the applicable experience of the Project Manager, the functions and relative responsibility/authority of the Project Manager.

- e) A description of the Proponent's project management approach for this assignment. This should include, the Proponent's role in administering the project, project-specific issues requiring a specific management approach and the functions and relative responsibility/authority of the Project Manager.

- f) A description of the firm's schedule control mechanisms and what action will be taken to ensure

the project schedule of the assignment will be maintained and what will be done to restore the schedule if problems develop. Describe how the schedule updating requirements in Section 2.1 will be achieved. Describe how scope changes will be handled to minimize schedule delays.

## **Section 4: Detailed Plan - Creation of OTM Book 15**

### **4.1 Project Description**

The objective of this project is outlined in Section 1.

### **4.2 Terms of Reference**

The scope of work includes the performance of all work necessary or appropriate for the Consultant to deliver the Project as provided in the TPMA. The list of tasks outlined in this Terms of Reference is intended to serve as a guide in developing a comprehensive list of work required for the assignment. It should not be taken as all-inclusive.

#### **4.2.1 Project Tasks**

The Consultant will be required to detail and describe the steps and procedures that it will undertake to create all sections of Book 15.

**The following is a partial list of project tasks/activities to be undertaken and should not be seen as all-inclusive. The Consultant will be expected to recommend additional activities and tasks that will improve the effectiveness and the quality of the final manual.**

## **BOOK 15 OUTLINE**

### **Book 15 • Pedestrian Control and Protection**

#### **1. Introduction**

##### **1.1 Purpose and Scope**

*Bring together the application of all signing, devices and markings pertaining to pedestrian control and protection that are provided in different books of the OTM. Based on the fundamental principles behind pedestrian control and protection, including right-of-way conflict resolution between pedestrians and other road users, speed and size differences between road users, the need for special protection of certain classes of pedestrians (e.g., school children, the elderly, limited mobility). Consider signing, devices and markings targeted at pedestrians themselves, as well as other road users that impact the safety of pedestrians, e.g., vehicles, bicycles, in-line skaters.*

*Reference existing relevant material that is provided and add new relevant material that is not provided in other OTM Books and in the MTO Geometric Design Standards for Ontario Highways.*

*Book 15 may include new devices.*

*Discuss the effectiveness of devices and advise against poor devices that are in common use.*

*Issues to be considered in creating Book 15 include changes to the HTA with respect to pedestrian rights, obligations and right-of-way rules. Other issues to be considered in HTA amendments include pedestrian crossovers and community safety zones.*

### **1.2 Application**

*Pedestrian control and protection infrastructure includes signs, signals and pavement markings designed to regulate the flow of pedestrians and to protect their safety, on all classes of roads, including footpaths, bicycle paths, local roads, urban and rural arterials, highways and expressways. Applications must be consistent with HTA or municipal bylaws that govern the control and protection of pedestrians. Sign placement should generally be consistent with the principles described in Book 1b (Sign Design Principles), but individual cases may be subject to exceptions from these guidelines, and these will be detailed as applicable. Sign size and placement must consider the target audience for the sign and where it is most likely to be noticed. Discuss warrants.*

## **2. Classification and Type of Pedestrian Facilities**

*Include a description of each type of facility.*

### **2.1 Time-separated Facilities**

*Pedestrians are controlled and protected from other road users by “time-sharing” the facility.*

### **2.2 Physical Pedestrian Aids**

*Physical barriers (e.g., fences) or shelters (e.g., islands, protected loading zones) that protect pedestrians from potentially dangerous impacts of other road users.*

### **2.3 Physically Separated Facilities**

*Pedestrians are controlled and protected from other road users by being physically separated from them.*

### **2.4 Integrated Facilities**

*Facilities where pedestrians are integrated with other road users, where special measures must be taken to control pedestrians and other road users, to ensure that pedestrians are protected.*

## **3. Time-separated Facilities**

### **3.1 General**

*Provide overview, reference to HTA, reference regulatory and warning sign sections.*

### **3.2 Uncontrolled Pedestrian Crossings**

*Include or provide references to definition, warrants, typical layout, design guidelines. An uncontrolled pedestrian crossing is time-separated based on the pedestrian’s judgement in choosing a time to cross. Consider the treatment of signs, devices and markings at pedestrian crossings where vehicles are not controlled such as at most midblock locations, at some intersections, at courtesy crosswalks, and at some channelizations or ramps.*

### **3.3 Pedestrian Crossings Controlled by Stop or Yield**

*Include or provide references to definition, warrants, typical layout, design guidelines. Consider the treatment of signs, devices and markings at pedestrian crossings where vehicles are stop or yield-controlled such as at roundabouts, at some intersections, and at some channelizations or ramps.*

*Discuss an all-way stop warrant based on pedestrian flow.*

### **3.4 Signalized Pedestrian Crossings**

*Include or provide references to definition, warrants, typical layout, design guidelines. Refer to OTM Book 12 warrants for partial and full traffic control signals. Partial signals include midblock and intersection pedestrian signals. Consider the treatment of signs, devices and markings at signalized pedestrian crossings. Facility may include vehicular and pedestrian signal, pavement markings, regulatory signs for vehicles and pedestrians.*

*Provide guidelines (using OTM Book 12 as a reference) on context-sensitive length of crossing time and phasing options (including pedestrian countdown signals). The context is based on the nature and mix of pedestrian, vehicular and other traffic using the intersection. In areas of high concentration of older adults or pedestrians with limited mobility, consider retiming pedestrian signals to allow for walk phases that accommodate a more appropriate walking pace such as 0.9 m/s.*

*Provide a reference to Geometric Design Standards for Ontario Highways Chapter B Traffic and Capacity.*

*Discuss the operation of pedestrian countdown signals, e.g. should the countdown display only during the Flashing Don't Walk phase, as per TAC.*

*Discuss pedestrian refuge islands at wide signalized crossings with high-speed traffic. Should the crosswalk go through the median? How does this accommodate pedestrians with limited mobility? Consider adequate width for a median push-button and its timing. Consider the operation and phasing, e.g. should there be two phases?*

*Consider scramble or barn-dance intersections.*

*Discuss ladder, zebra, interlocking brick and other types of crosswalk markings, considering conspicuousness to drivers.*

*Consider including signs at push buttons for pedestrians, on how to interpret pedestrian signal head legends to ensure that pedestrian traffic has cleared the intersection by the time that vehicle traffic is allowed to proceed.*

*Consider accessibility issues. Consider providing curb cuts to improve accessibility and to minimize the chance of slip and fall accidents.*

### **3.5 School Crossings**

*Include or provide references to definition, warrants, typical layout, design guidelines. At a school crossing, the time separation between pedestrians and vehicles is controlled by a Police Officer, School Guard or School Child Safety Patrol during locally-established time periods. The School Crossing system may include warning signs, advance warning signs, pavement markings, crossing supervisor hand-sign, and flashers.*

*Provide reference to OTM Book 11.*

*Provide reference to OTC school crossing information.*

### **3.6 Pedestrian Crossovers**

*Include or provide references to definition, warrants, typical layout and design guidelines. Point of discussion: how will changes to HTA be completed? Facility may include ground-mounted regulatory signs for vehicles, overhead illuminated signing, pedestrian actuated flashing amber beacons, pedestrian pushbutton sign and pavement markings and other devices.*

*Provide reference to OTM Book 12.*

*Discuss effectiveness, pros and cons.*

### **3.7 Provisions for Pedestrians at Railway Crossings**

*Include or provide references to definition, warrants, typical layout and design guidelines. Facility could include pedestrian barriers, warning signs targeted specifically at pedestrians, markings, and other devices.*

*Consider a sign warning of a possible second train approaching.*

## **4. Physical Pedestrian Aids**

### **4.1 General**

*Provide overview, reference to HTA, reference regulatory and warning sign sections.*

### **4.2 Pedestrian Refuges, Traffic Islands, Medians, Curb Extensions and Raised Crosswalks**

*Include or provide references to definition, warrants, typical layout and design guidelines. Discuss object markers for protection of pedestrians. Discuss recommended sizes. Describe operation of facilities (e.g., crossings) leading to/from refuges, islands and medians, depressed curb extensions and right-of-way rules applying to pedestrians and other road users.*

### **4.3 Loading Islands and Zones**

*Include or provide references to definition, warrants, typical layout and design guidelines. Describe special signing that could be used to supplement loading islands and zones, e.g., Toronto uses taxi stand sign, and some municipalities use bus loading signs. These are regulatory signs that are recommended for consideration in the next revision of OTM Book 5. SCHOOL BUS LOADING sign already exists as regulatory sign. Discuss object markers for protection of pedestrians.*

*Describe operation of facilities (e.g., crossings) leading to/from loading islands and zones. Discuss streetcar issues.*

#### **4.4 Pedestrian Fencing and Barriers**

*Include or provide references to definition, warrants, typical layout and design guidelines. Provide guidelines stating when physical barriers such as bollards, gates, walls, fences, isolated tubes, etc. should be applied, considering and balancing criteria such as length of facility, operating speed of traffic, traffic volumes, mix of traffic, visibility, safety and interference with pedestrian flow.*

*Consider need for mesh over pedestrian bridges over roads.*

#### **4.5 Delineation Lighting**

*Include or provide references to definition (e.g. sign lighting, runway lighting outlining a crosswalk), warrants, typical layout, design guidelines. Provide guidelines stating when delineation lighting should be applied.*

### **5. Physically Separated Facilities**

#### **5.1 General**

*Provide overview, reference to HTA, reference regulatory and warning sign sections.*

#### **5.2 Multi-modal Facilities**

*Include or provide references to definition (includes permanent and temporary pedestrian malls), warrants for devices, typical layout, design guidelines. Describe signing/barriers for vehicles to define the boundaries of pedestrian malls. Describe special signing that needs to be in place at crossroads within pedestrian malls to alert pedestrians that vehicular traffic is operating and caution needs to be exercised.*

### **6. Integrated Facilities**

#### **6.1 General**

*Provide overview, reference to HTA, reference regulatory and warning sign sections. Since these facilities accommodate mixed traffic, special care is required for protection of pedestrians, who are the most vulnerable of road users.*

#### **6.2 Shared Non-Motorized Vehicle/Pedestrian Facilities**

*Include or provide references to definition, warrants, typical layout, design guidelines. Often applies to recreational and commuter facilities for alternative transport modes. Pedestrians are vulnerable because they travel at lower speeds than the other users of the facilities. Facilities may be used by other users such as cyclists, skateboarders, mobile vendor carts, roller skaters, etc. Signing is required to indicate where pedestrians have the right-of-way and to restrict the speed of other facility users. Alternatively, the pavement can be divided using pavement markings to segregate pedestrians and other users, and advisory signing provided (e.g., as on parts of the Martin Goodman Trail, Toronto).*

*Consider adding shared sidewalk sign used in Ottawa indicating that cyclists must yield to pedestrians.*

*Consider crossing treatments.*

### **6.3 Shared Motorized Vehicle/Pedestrian Facilities**

*In some cases vehicles and pedestrians share the same facilities, e.g. where there is no sidewalk and a pedestrian must walk on the shoulder. Consider providing a warning sign to pedestrians to indicate that vehicles have right-of-way. WALK ON LEFT FACING TRAFFIC regulatory sign is oriented to roads without sidewalks that have significant pedestrian traffic. Note that there are also prohibition signs where pedestrians are not allowed on roads with heavy, fast-moving vehicular traffic, e.g., NO PEDESTRIANS Sign, NO PEDESTRIANS OR BICYCLES Sign.*

*Review available literature dealing with pedestrians on roadway shoulders where there are no sidewalk and highway applications. The Steering Committee will assist with providing some of those resources.*

## **7. Accessibility**

### **7.1 General**

*Provide guidelines where these types of aids should be installed, i.e., near CNIB, near blind schools, where there is a known person with limited mobility, where requested. Discuss any appropriate HTA applications.*

### **7.2 Audible Aids**

*Outline options available i.e., continually activated beeping, beeping that will initiate upon a command from a specialized remote, and the like. Consider developing supplemental pedestrian signing and pedestrian signals for visually impaired, e.g., Toronto has aggressive audible pedestrian signals that are only activated by the blind. Summarize or reference information on the pattern of pitches and beeps, as discussed in Book 12 (Traffic Signals).*

### **7.3 Tactile Aids**

*Outline options available such as textured pavements, concrete, domed surfaces, Braille on pedestrian signal pushbuttons. Consider developing supplemental pedestrian signing and pedestrian signals for hearing impaired.*

### **7.4 Low-mobility Issues**

*Outline options to assist persons with low mobility such as curb cuts, lower push buttons, access to push buttons, etc.*

## **8. Markings and Delineation**

### **8.1 General**

*Refer to book 11 for complete markings and delineation. Discuss any appropriate HTA applications.*

### **8.2 Time-Separated Facilities**

*Outline all relevant markings and delineation for facilities described in Section 3 above.*

### **8.3 Physical Pedestrian Aids**

*Outline all relevant markings and delineation for facilities described in Section 4 above.*

**8.4 Physically Separated Facilities**

*Outline all relevant markings and delineation for facilities described in Section 5 above. Include raised crosswalks.*

**8.5 Integrated Facilities**

*Outline all relevant markings and delineation for facilities described in Section 6 above.*

**9. Signals**

*Discuss any appropriate HTA applications. List all signal applications related to pedestrian issues, referencing Book 12 (Traffic Signals). Include the following:*

*Pedestrian Phases (Section 3.5)*

*Pedestrian Signals (Section 3.10)*

*Audible Indications (Section 3.10)*

*Pedestrian Signal Heads (Section 5.7)*

*Intersection Pedestrian Signals (Section 5.8)*

*Mid-block Pedestrian Signals (Section 5.8)*

*Layout Design of Crosswalks and Sidewalks (Section 5.10)*

*Layout of Pedestrian Heads and Poles (Section 5.12)*

*Design Example (Layout of Crosswalks and Sidewalks) (Section 5.14)*

*Design Example (Layout of Pedestrian Facilities) (Section 5.14)*

**Index****Appendix 10A • Definitions**

*Include time-separated pedestrian facilities, physically separated pedestrian facilities, integrated pedestrian facilities, pedestrian crossing, pedestrian crossovers, signal actuation, pedestrian mall.*

**Appendix 10B • References****Referenced Documents**

*Ontario Traffic Manual – Books 1, 2, 3, 4, 5, 6, 8, 9, 11, 12, 13, 14, 20, and 21; MTO Geometric Design Standards for Ontario Highways; Ontario Highway Traffic Act; Municipal Act.*

**Additional References**

*Highway Capacity Manual; Canadian MUTCD; ITE Transportation and Traffic Engineering Handbook.*

**Appendix 10C • OTC School Crossing Guard Manual****Signs****General**

*Provide reference to appropriate OTM Books where all regulatory and warning signs are located. Suggest that sign diagram be provided here, and that the sections of appropriate books be provided for further reference.*

**Regulatory Signs**

List all signs relating to Pedestrian issues, including:

CROSS ON GREEN LIGHT ONLY Sign .....	Ra-6
CROSS ON WALK SIGNAL ONLY Sign .....	Ra-7
CROSS ONLY AT CROSSOVER Sign .....	Ra-8
CROSS OTHER SIDE Sign .....	Ra-9, Ra-9A
PEDESTRIAN PUSHBUTTON Symbol Sign (with directional arrow) .....	Ra-12
PEDESTRIAN MUST PUSH BUTTON TO RECEIVE WALK SIGNAL Symbol Sign .....	Ra-13
SCHOOL ZONE MAXIMUM SPEED Sign .....	Rb-6
SCHOOL ZONE MAXIMUM SPEED WHEN FLASHING Sign .....	Rb-6A
STOP FOR SCHOOL BUS WHEN SIGNALS FLASHING Sign .....	Rb-37
BOTH DIRECTIONS (Tab Sign) .....	Rb-37t
NO PEDESTRIANS OR BICYCLES Sign .....	Rb-68
NO PEDESTRIANS Sign .....	Rc-12
WALK ON LEFT FACING TRAFFIC Sign .....	Rc-1
PEDESTRIAN Crossover Sign .....	Ra-4
STOP FOR PEDESTRIANS (Tab Sign) .....	Ra-4t
NO PASSING HERE TO CROSSING Sign .....	Ra-10
PEDESTRIAN PUSHBUTTON SIGN .....	Ra-11

**Warning Signs**

List all signs relating to Pedestrian issues, including:

SCHOOL AREA Sign .....	Wc-1
SCHOOL CROSSING Sign .....	Wc-2
SCHOOL CROSSING (Tab Sign) .....	Wc-2t
SCHOOL CROSSING AHEAD Sign .....	Wc-2A
CROSSING AHEAD (Tab Sign) .....	Wc-2At
PLAYGROUND AHEAD Sign .....	Wc-3
PEDESTRIANS AHEAD Sign .....	Wc-7
COMPACT OVERHEAD PXO Sign .....	Wc-20
STANDARD OVERHEAD PXO Sign .....	Wc-120

**Pedestrian Direction Signs****List of Tables****List of Figures**

#### 4.2.2 Project Team

The Steering Committee will contribute:

- A. Advice and recommendations to the consultant on manual content. Where there is disagreement within the Steering Committee, the members will be responsible for presenting a single recommendation to the consultant
- B. Relevant municipal, MTO and other studies, reports, data and provincial legislation (all provinces) that may assist the consultant with as the consultant undertakes the jurisdictional scan and literature review.
- C. Any relevant sign designs, diagrams and any other technical material that has already been developed by a municipality or MTO
- D. Direction and feedback to the consultant based on the consultant's recommendations and other submitted material
- E. Responses to questions from the consultant
- F. Responses to external inquiries with respect to the Book
- G. Conference call lines for meetings, when required

This Steering Committee will meet up to a maximum of 6 times (within the Greater Toronto area) during the project with the consulting team. There will be an additional meeting on June 9 to kick-off the project in Kingston, which will not count as one of the 6 meetings previously mentioned. The Steering Committee shall be comprised of representatives from the following:

- Ontario Traffic Conference (OTC)
- MTO representative(s)

Representatives will be identified from some or all of the following municipalities and organizations:

- City of Sudbury
- City of Toronto
- City of Ottawa
- Regional Municipality of Waterloo
- City of Mississauga
- Town of Oakville
- Town of Milton
- City of Burlington
- City of London
- City of Kingston
- Municipality of Chatham-Kent
- City of Brampton
- Region of Durham
- Region of Peel
- Other municipal funding partners may be added

Communicating with members of the Steering Committee

All communications between the consultant with the Steering Committee, as a group, will go through the OTC project manager.

Consultant:

The Consultant shall supply team members with the following expertise to the assignment:

Team Member Discipline / Specialty	Key Attributes
Project Manager	<p><b>Must be a professional engineer, licensed in Ontario</b>            Ability to lead and co-ordinate multi-disciplinary engineering specialties;            Demonstrated knowledge of and extensive experience with current industry and MTO design standards, specifications, policies, practices and processes related to pedestrian protection and control.            Demonstrated experiences in writing specifications, guidelines, standards, policies, practices and manuals.            Demonstrated proficiency in presentation, consultation, communication and technical writing skills.</p>
Sub-Project Team Leaders	<p>Ability to lead and co-ordinate multi-disciplinary engineering specialties;            Demonstrated knowledge of and extensive experience with current industry and MTO design standards, specifications, policies, practices and processes related to pedestrian protection and control.            Demonstrated experiences in writing specifications, guidelines, standards, policies, practices and manuals.            Demonstrated proficiency in presentation, consultation, communication and technical writing skills.</p>
Specialists	<p>Demonstrated knowledge of and extensive experience with current industry and MTO design standards, specifications, policies, practices and processes related to pedestrian protection and control.            Specialists must demonstrate their knowledge and expertise in their specific area of expertise</p>
Support Staff	<p>Editors must have demonstrated experiences in writing specifications, guidelines, standards, policies, practices and manuals.  <b>Writers must have experience in current industry and MTO design standards, specifications, policies, practices and processes related to pedestrian protection and control.</b>            Desktop publishing support staff must be familiar with MTO publishing requirements.</p>

**Note:**

The Consultant will be required to identify the Writers and Editors for this Assignment in their proposal.

The Consultant will also be required to list the specific and individual tasks that each team member will be undertaking including their duties and contributions to Tasks and Deliverables and these must be **clearly** identified and detailed in the proposal.

**4.2.3 Level of Co-ordination**

Project Status Meetings will be held with the full Steering Committee when major milestones have been completed. Material for discussion at project meetings shall be submitted at least five business days prior to the project meeting. Project review meetings will be held with the OTC and MTO Project Managers on a monthly basis.

The Consultant's Project Manager, and key support staff shall attend all project meetings. The Consultant will be required to identify in their submission key staff members that will be attending project meetings.

Agenda and minutes will be prepared and distributed by the consultant for all project meetings. The agenda for project meetings shall be distributed five business days prior to the scheduled meeting date and shall be structured to allow for input by project team members during the meeting. Minutes of meetings shall be distributed within five business days to all attendees and others as required.

Additional meetings may be required between the Consultant's staff, OTC staff and the Steering Committee particularly in regard to technical details. The consultant shall distribute drafts of working papers and the final deliverables at least five business days prior to a meeting or request for comments.

The Consultant will keep the OTC's Project Manager informed of project progress on a monthly basis and as required. The Consultant shall respond to any OTC inquiries within five business days and provide written response to all questions and concerns raised at Milestone meetings within five business days.

The Consultant will be responsible for coordinating and carrying out project planning, tracking and monitoring project tasks, schedules and costs, development and delivery of the final document to the satisfaction of the OTC's Project Manager.

The Consultant will be required to compile and summarize all comments provided on the draft material by the Steering Committee (spreadsheet format is recommended) prior to making changes and respond to the Steering Committee on how their comments were addressed.

The end of the project will be determined by the completion of the each project task and deliverable, and the acceptance of each deliverable to the satisfaction of the OTC's Project Manager.

#### **4.2.4 Main Project Deliverables**

- Review/Decision document for all changes made or suggested to Book 15 in both electronic Microsoft Word and Adobe Illustrator formats.
- Development of technical contents of each section of the manual.
- Submission of 1<sup>st</sup> draft of Book 15.
- Submission of 2<sup>nd</sup> draft of Book 15.
- Final Book 15 Materials, Source Materials and Hardcopies as defined in the Ontario Traffic Manual (OTM) Production Guide attached to this RFP.

**NOTE: The OTC will also require an electronic copy of OTM Book 15 in PDF format which must incorporate the Table of Contents and keywords throughout the document as hyperlinks to related sections of the Book 15. This must be provided on a separate CD from the other deliverables.**

#### **4.2.5 Project Schedule**

The following is a project schedule for this Assignment; the Consultant will be required to complete this schedule.

Contract Award	May 11, 2009
Start-up Meeting (in Kingston Ontario)	June 9, 2009
Monthly Project Meetings	Monthly TBD
Steering Committee Meetings	(max. of 6 meetings)
Results of Task 1	
Results of Task 2	
Results of Task 3	
Results of Task 4	
Results of Task 5	
Results of Task 6	
Results of Task 7	
Results of Additional Tasks Identified by Consultant	
Submission of 1 <sup>st</sup> Draft	

Submission of 2<sup>nd</sup> draft

Submission of Final Deliverables

November 2010

**Note: The project steering committee will require at least 3 weeks to review and provide comments on all draft documents and this should be taken into consideration in the schedule.**

#### 4.2.6 Payment

Invoices will be permitted on completed and delivered items. The maximum award will be \$325,000 (exclusive of GST) for all tasks.

#### 4.2.7 Proposal Instructions

The consultant must submit a proposal that includes the following information as a minimum for evaluation purpose:

- **Scope and objectives** – Demonstrate a clear understanding of the project's objective/scope and describe the challenges that might be encountered in its execution.
- **Methodology** – Describe the approach in which various components of the project are to be undertaken, level of analysis, resources that will be used and innovation proposed.
- **Work plan** – Show the time budgeted for the various components of the project; include deadlines for approvals through the various stages, and show that adequate time and resources are devoted to all aspects of the project.
- **Fees breakdown** – include a total project cost, a detailed fees breakdown of the various components of the job, and other expenses and disbursements per Task. All anticipated expenses and disbursements should be included in the initial proposal. A project payment schedule based on deliverables will be required to be submitted. Include unit rates.
- **Project Team** – Include the names and backgrounds of the project leader and team members (including sub-consultants), giving examples of similar projects they have worked on. This section must show that the team members have considerable experience in working with the subject matter and material. **The Consultant will be required to list the specific and individual tasks that each team member will be undertaking including their duties and contributions to Tasks and Deliverables**

**and these must be clearly identified and detailed in the proposal.**

- **References** – Provide appropriate staff Resumes and References.

Your submission should be limited to 10 single-sided pages, sized 8.5" X 11", not including schedules, appendices or resumes. Use 11-point Times New Roman font with 1" margins on all sides. Schedules may be on larger paper.

The OTC's project team main criteria in evaluating the submissions will be the Consultant Team Members qualifications and experience, methodology proposed, detailed work plan and innovation shown. The project steering committee reserves the right to interview selected candidates prior to selecting a consultant team.

Note to Proponents: If a Proposal does not meet the minimum Technical & Management requirements (i.e. scored below the minimum score), the Proponent will be disqualified and the Financial Envelope will be returned unopened.

#### **4.2.8 Proponents Understanding of the Project Scope**

In issuing this RFP, the agencies are relying on the experience and expertise of the consultants to prepare a comprehensive proposal.

It is the Proponent's responsibility to ensure that it has all the necessary information concerning the intent and requirements of this RFP and project.

Any change to this RFP will be issued in writing as a formal addendum to all Proponents.

### **Section 5: Financial Proposal**

#### **5.1 Terms of Reference**

##### **PAYMENT SCHEDULE FOR TPM SERVICES**

The documentation in the Financial Proposal shall become the Payment Schedule and form Schedule 10 of the TPMA. The Lump Sum Price shown in the Proposal Form (prepared by the Proponent and submitted in the Financial Proposal) shall be full compensation for all services, deliverables, equipment, materials and testing required to provide the TPM Services.

##### **Detailed Design Services**

The Lump Sum Price for Functional assignments is shown in Table 1 (on page 25) of the Payment Schedule Form (prepared by the Proponent and submitted in its Financial Proposal). The Consultant will be required to submit a payment schedule based on a submission of deliverables. The payments will be made on a basis of deliverables completed and submitted. Billings must be accompanied by a description indicating the status of the work and percent completion.

#### **5.2 Proposal Format**

The Financial Proposal shall contain the following information:

1. The Proponent shall submit the following:
  - i) Completed and signed Proposal Form;
  - ii) Completed Proposed Payment Schedule Form (Table 1)

Proposal Form

TO: Ontario Traffic Conference (the "OTC).

FROM: \_\_\_\_\_  
(the "Proponent")

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

**TENDER**

The Proponent hereby tenders and offers to enter into a contract to provide the Total Project Management Services specified in the Total Project Management Agreement and this Request for Proposals for the lump sum price of \$ \_\_\_\_\_ (exclusive of GST) and agrees that upon acceptance of this Tender by the OTC, this Tender, the Total Project Management Agreement and the Request for Proposals response shall form a Total Project Management legally binding agreement as described in this Request for Proposals document.

This Tender shall be irrevocable and open for acceptance for a period of ninety (90) days following the Proposal Due Date.

I HAVE AUTHORITY TO BIND THE PROPONENT:

\_\_\_\_\_  
Signature of Authorized Signing Officer:

\_\_\_\_\_  
(Print Name, Title)

\_\_\_\_\_  
(Date)



## **Section 6: Insurance Requirements**

### **6.1 Terms of Reference**

The TPM Consultant including each firm of a Consultant Joint Venture on or before execution of the TPMA requires proof of insurance. The attached form can be used in providing proof of appropriate General Liability Insurance. (This form does not cover Professional Liability Insurance).

The TPM Consultant is to include the names of all funding organizations on any liability insurance used for the Book 15 project.

If the TPM Consultant or Consultant Joint Venture chooses not to use this form, proof of appropriate General Liability Insurance coverage, and all funding organizations being a named insured in the policy is required.

**Certificate of Commercial General Liability Insurance**

To: Ontario Traffic Conference (hereinafter called the "OTC"):

1. This is to certify that \_\_\_\_\_

(hereinafter called the "Consultant") is insured by this insurer Policy No. (s) \_\_\_\_\_  
expiring \_\_\_\_\_, covering liability, as imposed by law or assumed by the Company under the  
terms of the above described Contract, for damages because of:

- a) Bodily injury, sickness or disease, including death at any time resulting there from; and
  - b) Damage to or destruction of property of others caused by accident, including loss of use thereof;
- subject to a limit of liability of not less than five million (\$5,000,000) dollars, inclusive for any one occurrence.

2. As applying to the contract, the policy includes coverage for liability arising out of operations performed for the Consultant by any Sub-Consultant.

3. The policy includes, as an additional insured, the OTC, but only in respect of, and during, operations performed by or on behalf of the Consultant and not in respect of any act or omission of the OTC, or any of the OTC's servants. In addition, the policy shall contain a Cross Liability Clause Endorsement.

4. The policy shall be an occurrence policy.

**In the event that the policy is changed or cancelled, the insurer agrees to give prior written notice to the OTC in the manner set forth in the Policy Conditions.**

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 2009

\_\_\_\_\_  
(Signature of Insurer's Official)

\_\_\_\_\_  
(Title)

Note: For Joint Ventures, all partners must complete this form.

**Section 7: Technical Standards and Specifications**

Section 7 shall become Schedule 11 to the TPMA.

This Project shall be carried out in accordance with the Project Requirements outlined in this RFP, the OTC's directives, accepted standards and specifications.

In the event of any conflict or inconsistency between documents, documents with the most recent date shall prevail.

**Section 8: OTC Acceptance/Approvals**

Section 8 shall become Schedule 12 to the TPMA.

In addition to requirements outlined elsewhere in the Agreement, the TPM Consultant must secure the following specific approvals and acceptance of the OTC. The turnaround times specified below apply only upon submission of all required documentation.

<b>OTC Acceptance/Approvals</b>		<b>Turnaround Time</b>
OTC Review and Comments on Draft Deliverables	Approval	3 weeks
OTC Review and acceptance of Final Deliverables	Approval	3 weeks

**END OF RFP**

## ONTARIO TRAFFIC MANUAL (OTM)

### PRODUCTION GUIDE

This guide document provides detailed specifications for production of the Ontario Traffic Manual.

#### 1.0 SOFTWARE SPECIFICATIONS

The following are the software requirements for **all** electronic materials to be created during the course of developed of the Ontario Traffic Manual (OTM). **All** electronic materials are to be provided to the Ministry on CD-ROM(s).

##### A. FINAL MATERIALS

- ❑ **OTM Book and Training Materials** (For "Print Ready" – Hardcopy)  
Desk Top Publishing (DTP) file(s)  
Adobe PageMaker 7 or later for Windows 95 / Windows 2000.  
Notes: - Illustrations are **not to be link** when inserted ("Placed") into the Pagemaker document.  
- Pagemaker files should be kept to a reasonable size for workability (i.e. 1 file = 1 chapter)
- ❑ **OTM Book and Training Materials** (For "Print Ready" – Electronic Copy)  
Adobe Acrobat 5.0 or later for Windows 95 / Windows 2000.
- ❑ **Discussion Paper**  
Microsoft Word 97 or later for Windows 95 / Windows 2000

##### B. SOURCE MATERIALS

- ❑ **Textual** material to appear within the OTM  
Microsoft Word 97 or later for Windows 95 / Windows 2000
- ❑ **Illustrations** to appear within the OTM  
(*sign patterns, charts, graphs, tables, figures, typicals, etc.*)  
Adobe Illustrator 10.0 or later for Windows 95 / Windows 2000
- ❑ Other **Non-illustration type graphic** files to appear within the OTM  
(*Scanned images, tables, graphs, charts, etc.*)
  - Adobe PhotoShop 5.5 or later for Windows 95 / Windows 2000  
(*.bmp, .eps, .gif, .jpg, .psd, .psp, .tif, etc.*)
  - Adobe Table 3.0 or later for Windows 95 / Windows 2000  
(*included with Adobe PageMaker 6.5*)
  - Microsoft Excel 97 or later for Windows 95 / Windows 2000
- ❑ **Electronic Font** to appear within the OTM  
Adobe Universe and Universe Light Postscript Fonts ONLY

#### 2.0 HARDCOPY SPECIFICATIONS - For ALL OTM Books

In addition to the CD-ROM containing the electronic materials and hardcopy requirements stated within the RFP document under "Deliverables", two (2) hardcopies created from the final Adobe PageMaker 7 file(s) **must** be included. These hardcopies should be as follows;

- In full colour
- One sided
- No binding
- 3 hole drilled

### 3.1 TYPOGRAPHICAL SPECIFICATIONS

The following are the detailed typographical specifications that are recommended:

- the only typeface to be used is **universe light (Adobe)**. This is the only font available in the width table;
- the body of the text is set at 10.5 point, with 12.83 point leading and 12.93 above as well as below;
- no right justification is used;
- the covers are **universe**, with the name of the Manual and the date (bottom right) **in universe light**;
- widows and orphans are set at 4;
- vertical justification is turned off, force this on individual pages if necessary;
- use only en dashes for hyphens between words, do not use em dashes;
- use typographical quotation marks and apostrophes;
- use ctrl spaces when a number and measurement appears (i.e., 5 km), as well as in instances such as: 3 x 4 cm; and
- avoid tracking text, use breaks and ctrl spaces to force text.

### 3.2 PAGE LAYOUT SPECIFICATIONS

**Page Size** 8 1/2" x 11"  
page

**Page Margins**

Top: 1.75"  
Bottom: 1.25"

Left: 1"  
Right: 1"

**Header Frame** 8.5" x 1.75"

**Header Frame Margins**

Top: 0.56"  
Bottom: 0.00"  
Left: 0.50"  
Right: 0.50"

**Footer Frame**

8.5" x 1.25"

**Footer Frame Margins:**

Top: 0.45"  
Bottom: 0.00"  
Left: 0.50"  
Right: 0.50"

### 3.3 STYLE SHEET SPECIFICATIONS

The same style sheet should be used for all books to ensure consistency. Do not add any new tags if there is any possible way to make the existing ones work. For detailed descriptions of tags, print style sheet. The following listing gives a brief description of what each tag is used for.

**Anchor**

For image frames, left-aligned, used for wide images.

**Anchor In**

For image frames, indented .8", used for narrow images to align with sign information below image

**App-A Head**

Used in Book 1, Appendix A, inside the frame at the top of columns (Sign Name and Number, Size (cm), Book, Page). This is in a floating frame.

**App-A Anchor**

Anchors the images, contains ruling line below, set with "no line break after".

**App-A Text**

For text following anchored frames.

**Body Brk Aft**

For text following numbers in numbered listings (no line break before).

**Body Brk Bef**

Tag for the number in numbered listings (no line break after).

**Body Indent**

A 0.5" indent, to be used only for sub-headings, never bold, and phone listings (which should be broken with soft returns).

**Body Text**

Used for all body text.

**Break Column**

Puts a column break at bottom of column to force text to next column.

**Break Page**

Puts page break at bottom of page to force text to next page.

**Bullet**

Bullet itself is set at 7 pt, with 0.02 pt upward shift, text inset 0.7" from bullet. This tag can be used as a sort of heading, bolding the first line and using a soft return.

**Bullet 2**

Same as Bullet 1, except entire bullet/text is inset 0.18". Use sparingly.

**Bullet Tight**

Same setting as Bullet, but less space above and below. Use for one-line bullet listings.

**Head 1 #**

E.g., 1.- 15 point, bold. First level heading, number only. Set with no line break after. Rule is set from this tag.

**Head 1 Text**

15 point, bold. First level heading, text only. Set with no line break before.

**Head 2 #**

E.g., 1.2 - 12 point, bold. Second level heading.

**Head 2 Text**

12 point, bold.

**Head 3 #**

E.g., 1.2.2 - 10.5 point, bold.

**Head 3 Text**

10.5 point, bold.

**Head 3 No #**

Same attributes as other Head 3 tags, but set to left-align, no breaks (for cases when there is no number).

**Head 4**

10.5 point, italic. Use sparingly, only if forced to add another heading.

**Header**

Use when a book title is too big to fit into the line in "Headers and Footers" box. Type name in at beginning of chapter. Tag is white with no spacing set.

**Indx # Head**

For Sign Number index in Book 1.

**Indx # Txt**

For Sign Number index in Book 1.

**Indx Name Hed**

For Sign Name index in Book 1.

**Indx Name Txt**

For Sign Name index in Book 1.

**S-After**

For sign text that appears after the picture of sign. Set with no line break before.

**S-Before**

For sign number that appears after picture of sign. Set with no line break after.

**S-Colour**

Same as S-Before, with more spacing above.

**Table Head**

For headings in tables, centred.

**Table Head L**

For headings in tables, left-aligned.

**Table Text****TOC Tags (1,2,3,4)**

For Tables of Contents - all are set with tabs and out-dents for 2+line flow.

**TOC 1 Book**

For book titles in the Table of Contents listing in Book 1.

**TOC 3 No #**

Use for contents listings with no number. Out-dent is set to accommodate this.

**TOC Head**

Table of Contents heading.

**TOC Book List**

Used only on first page of Book 1, for listing of books in OTM.

**TOC Head 2**

Header for Tables of Contents, set in floating frame. The Book Number cannot be generated and must be typed by hand. Watch out for re-flow here.

**Z\_FOOTER****Z\_HEADER****3.4 SPECIAL NOTES****Book 1, Appendix A**

This is built with anchored frames with a "no line break after" to keep it level with the text. Using this many frames, especially with breaks, could cause problems. Handle with care.

**Numbered listings<R>**

Should always appear with open and closing brackets (i.e., (1)). If a second level listing is necessary, use (a), (b), (c). Third level listings should not be used, but if forced, use (i), (ii), (iii).

**Contents and Indexes**

When books are fleshed out, create generated tables of contents and indexes. A lot of handwork will be required, after generating.

**Illustrations**

MTO, municipalities and other organisations as needed will supply the illustrations (sign patterns, graphs, tables, figures, etc.) to be included within the book. Final computer production of the illustrations for insertion in to the PakeMaker file will be the responsibility of the consultant developing of that OTM book(s).

**Headings**

When text is fleshed out, turn on "Keep with Next" for headings.

**3.5 FRONT, BACK AND TITLE PAGE SPECIFICATIONS****Front and Back Cover's**

See detailed specifications on sample attached

**Program**

Develop in Adobe Illustrator

**Page Size**

11" height x 17.5 width (add crop marks)

**Margins**

6.35 mm all around

**Font**

Univers and Univers Black

**Background**

Complied from various sign's detailed in the book. Background to be grouped, set at 20% black and placed to the back of the page .

**Spine**

1/2 wide, 1 inch down from top of page. Includes the title of the series (Ontario Traffic Manual), book name and number.

**Book Title**

In Univers Black at 56 points centred with in page width. Border is 3 points with 8.05mm white space between text and border.

**Title Page**

See detailed specifications on sample attached

**Page Size**

8.5" height x 11"width

**Margins**

6.35 mm all around

## Bidders' Meeting Minutes – March 12, 2009 Development of the Ontario Traffic Manual, Book 15

<p><b>Prepared by:</b> Ontario Traffic Conference</p> <p><b>Date:</b> March 12, 2009</p> <p><b>Time:</b> 1:00 p.m.</p> <p><b>Place:</b> OTC Office</p>	<p><b>Attendance:</b></p> <p>Marco D'Angelo, OTC  Phil Landry, City of Ottawa  Nancy Button, Region of Waterloo  Andrew Beal, MTO  John McGill, Aecom  Ray Bacqui, iTrans  Dave Richardson, MMM  Maryann Lovicsek, IBI  Matt Colwill, IBI  Mick Oliveira, MRC  Brent Hooton, Dillon  Peter Hillier, Delcan</p>	<p><b>Distribution:</b></p> <p>All</p> <p>Also posted on OTC Website</p>
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<p><b>Q1</b></p> <p><b>It was mentioned that all municipalities that contributed more than \$10,000 towards the development of Book 15 will have a representative on the project Steering Committee, but that other municipalities that contributed a lesser amount will not. How is the consultant to obtain the input of this second group of municipalities?</b></p> <p><b>A1</b></p> <p>The municipalities that contributed funding but that are not on the Steering Committee will have the opportunity to provide their input on drafts but the consultant will not be required to communicate with representatives of these municipalities. The OTC has the responsibility to communicate with these municipalities and ensure their input is brought forward to the consultant. They will be provided drafts of the manual to provide comments back through the OTC.</p> <p><b>Q2</b></p> <p><b>In previous OTM books the consultant was required to set up an advisory committee to provide input from stakeholders. Is the consultant also required to do that for this assignment?</b></p> <p><b>A2</b></p> <p>The Steering Committee consisting of representatives that contributed over \$10,000 will be that advisory committee as used in previous OTM book projects. In this case the consultant does not have to set up their own advisory committee.</p> <p><b>Q3</b></p> <p><b>Given march Break is in the middle of the timeframe for developing and submitting proposals, would there be any consideration to at least extending the dates for questions being asked?</b></p> <p><b>A3</b></p> <p>Yes, the schedule has been revised as requested, see the revised RFP.</p> <p><b>Q4</b></p> <p><b>Where will the Steering Committee meetings be held?</b></p>	
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<b>A4</b>	With the exception of the kick-off meeting which will be held in Kingston to coincide with the OTC annual convention the 6 steering committee meetings will be held in the greater Toronto area.
<b>Q5</b>	<b>The RFP indicates that the proposals will be rated based on a technical evaluation and on bid price. Will a firm's Corporate Performance Rating (CPR) score as used by MTO be used in the evaluation?</b>
<b>A5</b>	No the CPR scores used by MTO will not be used as this is not an MTO project.
<b>Q6</b>	<b>The RFP indicates that in evaluating the technical component of the proposal, only scores of 0, 4, 7 or 10 will be used.</b>
<b>A6</b>	Scores may be allocated as any whole number between 0 and 10. See revised RFP
<b>Q7</b>	<b>How did the OTC come up with the value of approximately \$325,000 for the assignment?</b>
<b>A7</b>	The value was based on the ministries experience with tendering for OTM books, particularly the last several manuals to be developed or revised. It took into consideration the amount of participation that the Steering Committee would be having compared to most previous OTM books.
<b>Q8</b>	<b>Do all project staff need to be registered as a professional engineer with PEO?</b>
<b>A8</b>	This requirement has been clarified in the revised RFP. The Project Manager must be a professional Engineer registered to practice in Ontario, but project team members do not have to be.
<b>Q9</b>	<b>Where references to other OTM books are made, will the consultant be required to develop the content for updating the other OTM books based on the content developed for Book 15?</b>
<b>A9</b>	No, the consultant will just need to identify that they have included content in Book 15 that will require another OTM book to be updated in the future. The consultant will be expected to ensure the content being developed for Book 15 is consistent with the other OTM Book content, but there may be a few instances where we may wish to identify changes to the other books based on best practices identified from newer research or studies.
<b>Q10</b>	<b>If any changes are made with only a few days left before the tender closes will the closing date be extended?</b>
<b>A10</b>	If any changes to the RFP are made OTC will ensure there is reasonable time for proponents to adjust their proposal before the closing date. The closing date will be adjusted if deemed necessary.
<b>Q11</b>	<b>Concerns were expressed over the requirement for 6 Steering Committee meetings, and monthly meetings with the select committee and then bi-weekly meetings with the project managers. Is there any opportunity to adjust these requirements as they add considerable overhead to the project?</b>

<b>A11</b>	The meeting and reporting requirements have been adjusted and are identified in the revised RFP to reflect the consultants concerns.
<b>Q12</b>	<b>Section 6.3 indicates a study of pedestrian use of roadway shoulders. Is it expected that the consultant will do a formal study or just a literature review of any existing studies?</b>
<b>A12</b>	It is expected the consultant will review available literature, The RFP has been revised to better clarify this.
<b>Q13</b>	<b>Is this project GST exempt? And should the final bid price reflect taxes?</b>
<b>A13</b>	The project is being done by OTC therefore the project is not GST exempt. The price bid should not include applicable taxes. The RFP has been revised accordingly.
<b>Q14</b>	<b>Are consultants being short listed for this project?</b>
<b>A14</b>	No the statement in the RFP has been removed in the revised RFP. The consultants that received the RFP or obtained it from the OTC website are all welcome to submit a proposal.
<b>Q15</b>	<b>Will the Steering Committee include any outside agencies such as CNIB, TAC, IMSA, CITE?</b>
<b>A15</b>	No, outside agencies such as these will be contacted by OTC and the Steering Committee for their input likely by providing drafts of the manual for comment.
<b>Q16</b>	<b>Will the form of agreement be provided so that legal staff from the consultants is able to review?</b>
<b>A16</b>	The form of agreement has been drafted and should be available in the next few weeks. It will be provided as soon as possible.
Meeting Adjourned at 2:45 pm	
<b>Note:</b> these minutes should be reviewed in conjunction with the revised RFP where changes resulting from this meeting will be highlighted in yellow.	

## Written questions submitted to OTC

*Q1. In selecting a successful consultant, will the agencies on the steering committee that contributed more money to the project be given more votes, or a greater say? For example, if the MTO contributed twice the amount that the City of Kingston contributed, will the MTO be given two votes?*

**A1. The steering committee will not be responsible for selecting the consultant. The consultants proposals will be evaluated by the selection team made up of OTC, MTO and several members of the OTC Traffic Engineering Committee. MTO does not get additional votes based on how much money they contributed.**

*Q2. What obligation does the MTO have to make changes to the Highway Traffic Act if the consultant and the steering committee deem a change is required? For example, if it is decided that at unprotected crosswalks it is preferable to give pedestrians the right-of-way, will the MTO make the necessary change to the HTA?*

**A2. MTO has no obligation to make the changes to the HTA mostly due to the fact that any legislative changes requested would have to be attached to a bill and it often takes a long time to find space on a bill where the government in power is willing to process it thru the house. That being said, MTO would give very serious consideration to making any legislative or regulatory changes suggested considering the recommendations would have the backing of OTC and a large number of municipalities that contributed funding to project.**