



Request for Proposals San Bruno/ South San Francisco Community Based Transportation Plan (CBTP) Update

Issue Date: February 5, 2024

Closing Date/Time for Requests for Clarification: February 20, 2024, 5:00 PM

Proposal Due Date: March 4, 2024, 5:00 PM

**City/County Association of Governments
of San Mateo County (C/CAG)**
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Contents

1	Introduction.....	2
1.1	Agency Description.....	2
1.2	Project Background.....	2
2	Request for Proposals (RFP).....	2
2.1	Purpose.....	2
2.2	Draft Scope of Work	3
2.3	Period of Performance.....	10
2.4	Method of Payment	11
2.5	Financial Management and Accounting System Requirements.....	11
2.6	Federal Aid Provisions	11
2.7	Metropolitan Transportation Commission (MTC) Requirements.....	12
2.8	General Instructions	12
2.9	Format	12
2.10	Proposal Content.....	13
2.11	Required Forms	15
2.12	Submittal of Questions	15
3	Evaluation and Selection Process	15
3.1	Review for Responsiveness.....	15
3.2	Ranking of Respondents by Evaluation Panel	16
3.3	RFP Schedule	18
	Attachments	18

1 Introduction

1.1 Agency Description

The City/County Association of Governments (C/CAG) of San Mateo County is a joint powers agency composed of the County of San Mateo and all twenty incorporated cities and towns in the county. As the county's designated congestion management agency, C/CAG is responsible for countywide transportation planning and administering state and federal funds for transportation in San Mateo County.

1.2 Project Background

The Metropolitan Transportation Commission's (MTC) Community Based Transportation Plan (CBTP) Program was initiated in 2002 with the goal of enhancing the mobility of residents of Equity Priority Communities (formerly referred to as Communities of Concern) and other historically disadvantaged populations. Specifically, CBTPs must improve access and mobility for historically underserved and systemically marginalized groups, including people with low incomes, communities of color, and residents of Equity Priority Communities (EPCs); and engage residents and community organizations in conducting the analysis and shaping the recommendations.

Since inception of the CBTP Program, C/CAG has produced CBTPs for East Palo Alto (2005), Bayshore (2008), North Central San Mateo (2011), and San Bruno/South San Francisco (2012). Additionally, in 2023, updates to the East Palo Alto and Bayshore plans were completed and renamed the *Southeast San Mateo County CBTP* and *Daly City CBTP*, respectively, in recognition of the expanded geographies contained in the plans.

In April 2022, MTC issued new program guidelines for the 2022-2026 CBTP Cycle and provided a funding allocation to prepare or update CBTPs (MTC Resolution No. 4514). The guidelines encourage prioritization of efforts to develop new CBTPs in EPCs that do not have a plan; areas where plans are more than five years old; and areas that have the highest concentration of low-income residents. Accordingly, given its age and concentration of historically disadvantaged populations, C/CAG has targeted update of the San Bruno/South San Francisco CBTP.

2 Request for Proposals (RFP)

2.1 Purpose

The purpose of this RFP is to solicit proposals, select a consultant, and award a contract to update the *San Bruno/South San Francisco Community Based Transportation Plan*, adopted in 2012, in accordance with the guidelines outlined in MTC Resolution No. 4514, Attachment A.

The proposals submitted in response to this Request for Proposal (RFP) will be used as a basis for selecting the Consultant for this CBTP. The Consultant’s proposal will be evaluated and ranked according to the criteria provided in Section 3, Evaluation and Selection Process, of this RFP.

The RFP documents for this project are available for download on the C/CAG website at <https://ccag.ca.gov/opportunities>. Proposers are responsible for checking the website for any Addenda to this RFP. Responses should be submitted in accordance with the instructions set forth in the RFP.

Interested firms must submit their Proposal by **5:00 PM on Monday, March 4, 2024**, in accordance with the instructions contained in the RFP.

2.2 Draft Scope of Work

The CBTP Update will be a collaborative planning process focused on working with residents of the targeted Equity Priority Communities (EPCs) to identify transportation gaps and to help set priorities for improvements. The process will be led by a Project Management Team, with additional support from a Steering Committee and Technical Advisory Committee to support each of the tasks outlined below. Proposing team may suggest modifications, additional, or optional tasks; however, the intent of the project tasks should remain the same.

TASK 1. PROJECT INITIATION/ADMINISTRATION

Finalize approach, scope of work, schedule, and budget with Project Management Team

The project is envisioned to take approximately 18 months. The Consultant team will facilitate a project kick-off meeting and provide an agenda to review project goals, communication protocols, schedule, deliverables, and meeting dates. The Project Management Team (PMT) will consist of staff from the Consulting firm, C/CAG, and MTC.

Ongoing Project Management

Monitor project scope, budget, and schedule on an ongoing basis. Coordinate regular communication with Project Management team members to review progress, confirm adherence to budget/scope/schedule, and provide an opportunity for input/guidance.

Task	Deliverable
1.1	<i>Project Scope, Budget, and Schedule</i>
1.2	<i>Kickoff Meeting</i>
1.3	<i>Phone calls at a regular interval agreed upon by Project Management team</i>

TASK 2. ADVISORY/OVERSIGHT COMMITTEE PLANNING PROCESS

Task 2.1. Steering Committee

The Steering Committee will establish project goals and evaluation criteria for potential strategies and programs, assist in outreach efforts, review deliverables, provide technical guidance, aid in development of an action plan, provide support for on-going implementation, and provide other assistance as needed. The Project Management team will convene a Steering Committee likely consisting of staff representatives from County planning and health departments, SamTrans, and local Community Based Organizations (CBOs).

This subtask includes developing a schedule of meetings for the Steering Committee and coordinating the logistics of meetings, including development of meeting agendas, materials, and minutes. The Steering Committee is envisioned to meet up to six times over the course of the project.

Task 2.2. Technical Working Group

The Technical Working Group will provide leadership and technical expertise throughout the planning process, review deliverables prior to presentation to the stakeholders, and assist in the communication of project materials and milestones to public stakeholders. Working with the Project Management team, the Steering Committee will recommend members for the Technical Working Group that includes, but is not limited to, representatives from the following organizations:

- C/CAG staff
- MTC staff
- SamTrans staff
- City of San Bruno (planning and engineering)
- City of South San Francisco (planning and engineering)

This subtask includes developing a schedule of meetings for the Technical Working Group and coordinating the logistics of meetings, including development of meeting agendas, materials, and minutes. The Technical Working Group is envisioned to meet six times over the course of the project.

Task	Deliverable
2.1	<i>Memorandum outlining the roles and anticipated schedule/time commitment for the Steering Committee; proposed schedule of meetings; coordination of meetings, including development of meeting materials and minutes</i>
2.2	<i>Memorandum outlining the roles and anticipated schedule/time commitment for the Technical Working Group; proposed schedule of meetings; coordination of meetings, including development of meeting materials and minutes</i>

TASK 3. DEVELOP STATUS REPORT OF EXISTING CBTP ACTION PLAN

The existing CBTP action plan status report will summarize progress made since the adoption of the previous San Bruno/South San Francisco CBTP. The report will outline the status, constraints/challenges, and deviations for each project or initiative recommended in the plan. The consultant team will work with city staff from each jurisdiction to identify the status of each initiative. As appropriate, this information will be incorporated into the public outreach process.

Review and Verify Existing CBTP Action Plan Status

- Review past CBTP.
- Consult with Technical Working Group members from the CBTP area to verify project status, pinpoint any pipeline projects, and identify impediments/concerns impacting implementation (e.g. lack of funds, status of funding applications, lack of staff, issues being addressed in alternate fashion, project no longer needed/shifting priorities, etc.).

Task 3.1. Existing CBTP Action Plan Status Summary Memorandum

The information generated from Task 3.1 should be summarized in a master matrix for easy reference. This matrix can be included in a summary memorandum where supplemental information can be compiled.

Task	Deliverable
3.1	<i>Status Matrix of Existing CBTP Action Plan Items</i>
3.2	<i>Draft and Final Existing CBTP Action Plan Status Summary Memorandum (one for each planning area)</i>

TASK 4. CONDUCT COMMUNITY NEEDS ASSESSMENT (DATA ANALYSIS AND EXISTING CONDITIONS)

The community needs assessment will be used to establish baseline conditions and identify unmet transportation needs, gaps, and priorities for the planning area. The community needs assessment will be incorporated into the public outreach process (Task 5) and used to inform recommendations (Task 6).

Task 4.1. Demographic Analysis

Collect demographic, socioeconomic, and travel data from available sources such as the 2020 US Census and American Community Survey, California Household Travel Survey, etc. This subtask includes a demographic assessment for the planning area and will be used to create a community profile for the plan area.

Task 4.2. Analysis of Existing Mobility Services

Identify existing mobility services in the planning area including roads, transit, bicycle/pedestrian facilities, ferry service, etc. To the extent possible, bus ridership and origin/destination information should be gathered for the planning area. This information will be used to identify travel patterns and potential gaps in mobility services in later tasks.

Task 4.3. Review Background Documents and Planning Studies

Review background studies and existing planning documents (e.g. Reimagine SamTrans, SamTrans Strategic Plan, San Mateo County Senior Mobility Action Plan, local circulation elements and/or bike and pedestrian plans, local area plans, County Transportation Plan, San Mateo County HSA Transportation programs, etc.) and document efforts relevant to the planning area.

Task 4.4. Base Mapping

Create maps of the planning area that include regional context, community facilities and amenities, major transportation infrastructure, existing transportation services (e.g. transit, bike/ped facilities, and ferry service), and relevant demographic and socioeconomic information.

Task 4.5. Summarize Existing Conditions and Key Trends

Prepare a draft and final community assessment report for the planning area, summarizing key findings in terms of community profile and any transportation gaps identified in Tasks 4.1, 4.2, 4.3, and 4.4. The community assessment and existing conditions report will be incorporated into the public participation process (Task 5).

Task	Deliverable
4.1	<i>Data Compilation and Processing</i>
4.2	<i>Summary of Existing Mobility Services (to be included in Task 4.5 report)</i>
4.3	<i>Summary of Background Documents and Planning Studies (to be included in Task 4.5 report)</i>
4.4	<i>Development of maps (to be included in Task 4.5 report)</i>
4.5	<i>Draft and Final Community Assessment Report and Executive Summary</i>

TASK 5. CONDUCT COLLABORATIVE PLANNING AND OUTREACH PROCESS

Public participation and community outreach will form the basis of the strategies developed to address transportation needs and/or gaps in the community. Community outreach will be conducted with support from project area CBOs and other Steering Committee and Technical Working Group members as appropriate. A mix of innovative and traditional outreach methods

should be used to reach broader audiences. These strategies may include online surveys, on-the-ground engagement, and community meetings. All outreach materials, activities, and advertisements should be available in additional languages as appropriate for the plan area demographics.

Task 5.1. Establish a Community Outreach Plan

Develop a two-phase public participation and outreach plan. Work with the Steering Committee to determine the appropriate activities and methods to effectively engage and draw out a wide audience including, among others, low-income residents, school representatives, social service agencies, faith-based organizations, and other CBOs. Outreach activities may include:

- Pop-up events in each planning area at libraries, major bus stops, park events, etc.
- Attendance at regularly scheduled CBO meetings
- In person surveys
- Online surveys
- Community conversations
- Public workshops

Phase one of the outreach effort will be conducted early in the project to identify the transportation needs/gaps within the study area, building on findings from the Existing CBTP Action Plan Status report (Task 3) and Existing Conditions Report (Task 4). Input from the phase one outreach events will be used to inform and develop transportation strategies (Task 6.1). A minimum of four outreach events should be assumed during this phase (two pop-up events and two traditional meetings held in partnership with a CBO – meetings typically held on weekends or evenings).

Phase two will be held during Task 7.1 in order to share the draft Plan with each COC and to provide opportunities for stakeholders to review and share feedback on the proposed strategies. This will include one traditional meeting held in each planning area in partnership with the CBO in phase one.

A project webpage will be developed by Consultant, maintained and monitored throughout the project to allow for participation from those who cannot attend a meeting or are not reached during a pop-up event.

Task 5.2. Develop Outreach Materials and Webpages

Outreach materials will be developed utilizing the Existing CBTP Action Plan Status reports (Task 3) and existing conditions analyses (Task 4). To help focus discussion during outreach events the Existing CBTP Action Plan Status reports can be pointed to as products of the public's input in the earlier plans and help determine whether the issues and solutions have already been identified and not acted on, or whether additional issues have arisen and/or taken their place. The existing conditions information will be presented to define the baseline evaluation and highlight possible transportation gaps in the project areas. In addition, information on new/emerging technology that wasn't available in the past will be provided (ride share, electric bicycles, bike share, etc.), to ascertain levels of interest/barriers and to inform potential strategies.

The project webpage will be updated to reflect the topics, materials, and questions asked at each outreach event, allowing for comment on the plan's development at the appropriate times.

Task 5.3. Implement Community Outreach Plan

With support from project CBOs, Steering Committee, and Technical Working Group, the team will execute the outreach plan utilizing appropriate strategies identified in Task 5.1. Over the course of the project a minimum of six outreach events are recommended for the planning area, geographically distributed throughout. Feedback from outreach meetings, and received online, will be documented in an outreach summary.

Task	Deliverables
5.1	<i>Summary Memorandum of Outreach Plan</i>
5.2	<i>Outreach Material and Collateral; webpage maintenance</i>
5.3	<i>Outreach Execution; Outreach Summaries</i>

TASK 6. DEVELOP TRANSPORTATION STRATEGIES AND IMPLEMENTATION PLAN

Task 6.1. Develop Strategies to Close Transportation Gaps

Based on input from the community outreach activities, Steering Committee and Technical Working Group meetings, as well as findings from the existing conditions and project status processes, the team will develop a list of multimodal projects and programs to address the mobility needs of the study area.

Task 6.2. Establish Evaluation Criteria and Prioritize Strategies

- In conjunction with the Steering Committee and Technical Working Group, establish criteria for prioritizing proposed strategies. Criteria may include cost effectiveness, funding availability, and implementation constraints.
- Prioritize strategies using the evaluation criteria.

Task 6.3. Identify Implementation Requirements and Responsibilities

Develop an implementation plan for each prioritized project or program identified in Task 6.2.

For each project/program, the following will be determined:

- potential funding sources
- cost estimates
- potential implementation timeframe
- responsible agency

Task	Deliverables
6.1	<i>List of Potential Projects and Programs</i>
6.2	<i>Matrix of Prioritized Projects</i>
6.3	<i>Implementation Plan</i>

TASK 7. COMMUNITY BASED TRANSPORTATION PLAN

Task 7.1. Draft Community Based Transportation Plan

Combine and summarize all previous tasks into a draft Community Based Transportation Plan document for review by the Project Management Team, Steering Committee and Technical Working Group (Oversight Committee) and to be shared with the communities as part of phase two of outreach. The plans will include the following sections:

- Executive Summary
- Introduction on the overall program and planning process
- Existing Conditions Summary: Description of project area (geography, demographics and maps) (Task 4)
- Community Outreach Process: Outreach activities and findings (Task 5)
- Transportation Strategies: Clearly defined near-, mid- and long-term recommendations (projects and programs) to address community-identified needs (Task 6)
- Implementation, including costs estimates, timeframes, funding sources and responsible agencies for each recommendation (Task 6)

Task 7.2. Final Draft Transportation Plan

Comments from the public, the Steering Committee and the Technical Working Group will be addressed and incorporated into the final Draft Community Based Transportation Plan.

Task	Deliverables
7.1	<i>Draft CBTP</i>

TASK 8. MONITORING AND EVALUATION

Task 8.1. Develop Process to Monitor Implementation

Develop process/mechanism to track progress and funding on implementation. Ensure that the Steering Committee and Technical Working Group have an opportunity to weigh in on the development of performance metrics.

Task 8.2. Develop Reporting Requirements

Develop monitoring and reporting requirements and responsibilities, including a standardized template acceptable to MTC. Process must reflect requirement to report to MTC every two years.

Task	Deliverables
8.1	<i>Memorandum Describing Process for Tracking Progress</i>
8.2	<i>Reporting Template and Reporting Requirements</i>

TASK 9. PLAN ADOPTION

Consultant shall incorporate appropriate modifications to the Draft CBTP into a Final Draft. C/CAG and local jurisdictions must formally adopt the final CBTP reports and commit to including the recommendations and action plans in their respective planning and funding plans.

Task 9.1. Present Final Report for Adoption

Consultant team shall prepare draft adoption materials (staff report and resolution template) and present the plan to local approval agencies. Two meetings each in San Bruno and South San Francisco should be assumed, as well as one meeting before the C/CAG Board of Directors. Additional meetings may be necessary based on level of comments received.

Task	Deliverables
9.1	<i>Final Draft CBTP</i>
9.2	<i>Resolutions of Local Support from South San Francisco, San Bruno and C/CAG</i>

TASK 10. TRANSMIT FINAL DOCUMENT TO MTC

Task 10.1 Prepare Final Plan and Transmit to MTC

Consultant shall incorporate any additional plan modifications into a final plan and shall ensure the final CBTP plan meets MTC's accessibility requirements. Once complete, Consultant shall transmit the final plan, together with related Resolutions of Support to MTC.

Task	Deliverables
10.1	<i>Transmittal of Final Community Based Transportation Plan & Resolutions of Local Support to MTC</i>

2.3 Period of Performance

The contract resulting from this RFP is anticipated to start in April 2024, and the term will be for a period not to exceed twenty-four months. Contract amendments are required to modify the terms of the original contract for changes such as extra time, added work, or increased costs.

2.4 Method of Payment

The Consultant will be paid on a task and deliverables basis, subject to the terms and conditions established through the contract negotiations that result from this RFQ. The total contract dollar amount should not exceed \$200,000.

2.5 Financial Management and Accounting System Requirements

A contract shall not be awarded to a consultant without an adequate financial management and accounting system as required by 48 Code of Federal Regulations (CFR) Part 16.301-3, 49 CFR Part 18, and 48 CFR Part 31.

Selected Consultant shall comply with Chapter 10.3 of the Local Assistance Procedures Manual regarding the non-A&E Consultant Contract Audit and Review process.

2.6 Federal Aid Provisions

The proposing Consultant's services are federally funded, which necessitate compliance with additional requirements. Special attention is directed to Attachment C – Local Assistance Procedures Manual Exhibit (LAPM) 10-O1, Consultant Proposal DBE Commitment. The proposing Consultant shall complete and submit the referenced forms with the proposal to be considered responsive. These forms and instructions are provided for the proposer in Attachment C.

This solicitation is financed in whole or in part and therefore subject to Title 49, Code of Federal Regulations, Part 26 entitled "Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs". To ensure equal participation for Disadvantaged Business Enterprise (DBE) groups specified in 49 CFR 26.5, DBE participation is required. Only participation by certified DBEs will count toward the contract goal for this solicitation. In order to count toward a contract goal, a firm must be certified by the California Unified Certification Program (CUCP) and possess the work codes applicable to the type of work the firm will perform on the Agreement by the RFP submittal due date. For a list of work codes, go to <https://caltrans.dbesystem.com/>

It is the proposer's responsibility to verify that the DBE firm is certified as a DBE by the specified RFP submittal due date and time. For a list of DBEs certified by the CUCP, go to: <https://caltrans.dbesystem.com/>.

Reference "Request for Proposal Submittal Requirements" for detailed information and references to the required forms. Required forms will be made part of the agreement. Failure to meet the DBE goal or Good Faith Effort requirements and provide required DBE participation at due date and time of proposal submittal may result in the proposal being rejected as non-responsive.

Federal and/or State prevailing wage rates may apply. This requirement, if applicable, will be specified in the draft Agreement.

- Local Agency Proposer DBE Commitment (Consultant Contracts); (LAPM 10-O2). **The contract DBE Goal is 15%.**
- DBE Information - Good Faith Effort (LAPM 15-H) – Required only if DBE goal is not achieved. It is recommended that proposer prepare and submit a GFE irrespective of meeting the DBE goal.
- Disclosure of Lobbying Activities (LAPM 10-Q)

Upon award and through completion of the project, the successful proposing Consultant will be required to follow applicable federal-aid requirements and shall complete and submit with the agreement the following forms at the time of award:

- Local Agency Proposer DBE Information (Consultant Contracts) (LAPM 10-02)
- Any other relevant forms required during the project.

Consultant shall demonstrate familiarity of providing services for federally funded projects and have clear understanding of requirements/needs to facilitate the project through Local Agency Local Assistance and Local Assistance Procedures Manual.

2.7 Metropolitan Transportation Commission (MTC) Requirements

The proposing Consultant's services are funded under a funding agreement between C/CAG and the MTC, which are subject to terms and conditions set forth in Attachment D. Selected Consultant shall comply with applicable terms and conditions of the MTC Master Agreement and MTC Program Supplement.

2.8 General Instructions

Interested respondents shall submit an electronic copy of the complete proposal, **no later than 5:00 p.m. (Pacific Time) on March 4, 2024**. Proposals received after the time and date specified above will be considered nonresponsive, and Consultant will be so advised. The receipt of proposal will be timestamped based on the Program Manager's computer. C/CAG is not responsible for submissions delayed for any reason.

Submittals should be forwarded by email to:

Susy Kalkin kkalkin@smcgov.org
 Transportation Systems Coordinator
 City/County Association of Governments of San Mateo County
 555 County Center, 5th Floor
 Redwood City, CA 94063

2.9 Format

Proposers shall submit one (1) electronic copy of the proposal. Each page shall be the equivalent of 8.5" x 11" or 11" x 17", be sequentially numbered, include a table of contents, and not exceed

the equivalent of ten (10) double-sided pages, excluding the transmittal letter, staff resumes, and references.

Any proposal received prior to the time and date specified above may be withdrawn or modified by written request of the Consultant. To be considered, however, the modified proposal must be received prior to **5:00 p.m. (Pacific Time) on March 4, 2024.**

2.10 Proposal Content

Each submittal must include the information listed below.

1. **Transmittal Letter.** Provide a cover letter that describes the Consultant's interest and commitment to the project. The cover letter should include the name, title, address, telephone number, and e-mail address of the individual to whom correspondence and other contacts should be directed during the selection process. The person authorized to negotiate contractual agreements shall sign the cover letter.
2. **Project Understanding/Scope of Work Statement.** Briefly present the Consultant's understanding of MTC's Community Based Transportation Plan (CBTP) Program, as well as the general approach to the services described in Section 2.2 of this RFP. This section should present a work plan for the tasks described in the Scope of Work, including the following:
 - a) Discuss how the Proposer will conduct the identified task, identify deliverables, and propose a schedule. The proposal should discuss the tasks in sufficient detail to demonstrate a clear understanding of the project and component tasks. The proposal may include additional tasks or sub-tasks the Proposer believes necessary to accomplish the project goals. The schedule should show the expected sequence of tasks, subtasks, and milestones.
 - b) Provide a staffing plan for each task. Provide an organizational chart that shows roles and responsibilities of key personnel and reporting structure, including reporting and communication relationships between C/CAG, Consultant staff, and subcontractors, if any. The submittal shall designate a project manager who will provide a single point of contact for the management and coordination of all aspects of the work. The project manager shall be responsible for coordinating and tracking all deliverables, communication with the C/CAG program manager, and reporting of results and recommendations. Identify the task leads and backup individuals. All staff shall be clearly identified with their roles defined as well as their proposed work location during the program.

- c) Describe approach to managing resources and maintaining quality results. Include a description of the role of any subcontractors, their specific responsibilities, and how their work will be supervised to maintain quality results.
 - d) Identify and explain any problem areas and/or potential obstacles (such as maintaining schedule, budget overruns, feasibility, etc.) to successful completion of the Scope of Work. Discuss methods, formal and informal, that you will use to track and resolve these problems/obstacles during the project.
 - e) Schedule of Work - Using a Gantt chart, provide a detailed schedule for all phases of the project and the proposing Consultant's services including time for reviews and approvals. The schedule shall meet the anticipated project kick-off during April 2024 and identify a project completion date prior to April 20, 2026; however, expedited schedules are preferred with justification for timeline feasibility.
3. **Firm Qualifications and Experience.** Provide a detailed statement describing the Consultant's qualifications and experience in providing the services described in Section 2.2 of this RFP. Discuss any experience with innovative approaches or advanced techniques related to the proposed services. Describe the Consultant's experience working with state or federally funded projects.
4. **Staff Qualifications and Experience.** Provide a brief summary of the relevant qualifications and experience of the staff assigned to the project. Brief resumes of key staff may also be included. Any substitution of the Project Manager and/or key staff assigned to the project after submittal of the SOQ or during the contract period will require prior written approval from C/CAG.
5. **Project Management.** Describe the Consultant's approach to project management, including communications and coordination with C/CAG and project sponsors. Describe how management of any subconsultants will be handled as well as budgetary controls to avoid exceeding resources allocated for specific projects and tasks.
6. **References.** Provide a list of three (3) references who can comment on the recent (within the last three years) and relevant experience of the Consultant and key staff assigned to the project. Include a brief description of the services provided to each reference, the years the work was provided, the project budget, the sponsoring agency, the contact information of the reference, and the roles played by the key staff assigned to this project.
7. **Cost Proposal.**
Proposal shall include a detailed cost proposal for the project. The cost estimate shall include personnel names, classifications, hourly rates, overhead rates, and any other cost

items necessary to perform each of the tasks listed in the Scope of Work. A total cost shall then be summarized and presented. Describe your cost control and budgeting methodology for this project. A line-item budget must also be submitted for proposed sub-consultants with contracts estimated to exceed \$25,000. Attachment B is a Cost Proposal Template for the consultant to use. Rates shall include all direct and indirect costs, fully loaded hourly rate means an hourly rate that includes all applicable surcharges such as taxes, insurance and fringe benefits as well as indirect costs, overhead and profit allowance, and ordinary materials and supplies. Rates indicated shall be firm for the initial contract term and any annual rate escalation shall not exceed 3%. C/CAG reserves the right to negotiate with or to decline to enter into a contract with a Proposer's whose rates are unreasonable at C/CAG's sole discretion.

2.11 Required Forms

Each submittal must include the required forms listed below.

1. **Consultant Contract DBE Information.** Fill out Exhibit 10-O1 Consultant Proposal DBE Commitment, or Good Faith Effort (LAPM 15-H) if DBE goal is not achieved. See Attachment C.
2. **Disclosure of Lobbying Activities** (LAPM 10-Q)

2.12 Submittal of Questions

Any questions about the RFP must be submitted in writing by Tuesday, February 20, 2024 at 5:00 p.m. Questions should be e-mailed to:

Susy Kalkin, Transportation Systems Coordinator – kkalkin@smcgov.org and cc'd to Sean Charpentier, C/CAG Executive Director – scharpentier@smcgov.org

Addenda to this RFP, if issued, will be sent to all prospective consultants C/CAG has specifically e-mailed a copy of the RFP to and will be posted on the C/CAG website at:

<http://ccag.ca.gov/opportunities>

It shall be the consultant's responsibility to check the C/CAG website to obtain any addenda that may be issued.

3 Evaluation and Selection Process

3.1 Review for Responsiveness

C/CAG staff will conduct an initial review of the proposals for responsiveness to ensure that each meets the requirements of this RFP. Any proposal that does not include enough information to permit the evaluation panel to rate the proposal in any of the evaluation criteria listed in Section 3.2 will be considered non-responsive.

The selection process may include oral interviews. If oral interviews are necessary, the consultant will be notified of the time and place of oral interviews and if any additional information that may be required to be submitted. The evaluation criteria are included below.

3.2 Ranking of Respondents by Evaluation Panel

After proposals have been reviewed for responsiveness by C/CAG staff, an evaluation panel will evaluate the proposals that have been determined to be responsive. The evaluation panel may be composed of C/CAG staff and other parties that may have expertise or experience in the services described herein. The evaluation panel will review and rank the submittals. The evaluation of the proposals shall be within the sole judgment and discretion of the evaluation panel. Following the evaluation of the written proposals, the evaluation panel may elect to develop a short list of consultants for interview. C/CAG reserves the right to hold interviews and review and evaluate the references of short-listed firms only. Additionally, C/CAG reserves the right not to convene interviews, but to evaluate respondents on the basis of the written proposals alone.

Proposals will be evaluated according to each evaluation criteria and scored on a zero-to-five-point rating. The scores for all the evaluation criteria will then be multiplied according to their assigned weight to arrive at a weighted score for each proposal. A proposal with a high weighted total will be deemed of higher quality than a proposal with a lesser-weighted total. The final maximum score for any proposal is five hundred (500) points.

The Evaluation Criteria Summary and their respective weights are as follows:

No.	Evaluation Criteria	Rating (0-5)	Weight	Score (Rating * Weight)
1	Organization of Proposal		5	
2	Staff and Firm Qualifications		20	
3	Understanding of Project Scope of Work		10	
4	Proposed Project Approach		20	
5	Cost Effectiveness		20	
6	References		5	
7	Presentation by Team		10	
8	Q&A Response to Panel Questions		10	
	Total:		100	/500

		Rating Scale
0	Not Acceptable	Non-responsive, fails to meet RFP specifications. The approach has no probability of success. For mandatory requirement this score will result in disqualification of proposal.
1	Poor	Below average, falls short of expectations, is substandard to that which is the average or expected norm, has a low probability of success in achieving project objectives per RFP.
2	Fair	Has a reasonable probability of success, however, some objectives may not be met.
3	Average	Acceptable, achieves all objectives in a reasonable fashion per RFP specification.
4	Above Average/Good	Very good probability of success, better than that which is average or expected as the norm. Achieves all objectives per RFP requirements and expectations.
5	Excellent/Exceptional	Exceeds expectations, very innovative, clearly superior to that which is average or expected as the norm. Excellent probability of success and in achieving all objectives and meeting RFP specification.

Following this evaluation of the proposals and oral interviews (if held), the evaluation panel will produce a final ranking of the responsive consultants, which will be forwarded to the C/CAG Executive Director. The Executive Director will review the recommendation and, if he agrees, staff will forward the recommendation to the C/CAG Board of Directors with a recommendation that the Board authorize award of the contract.

This RFP does not commit C/CAG to award a contract, to pay any costs incurred in the preparation of a proposal for this request, or to procure or contract for services. C/CAG reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified Consultant, or to modify or cancel in part or in its entirety the RFP if it is in the best interests of C/CAG to do so. Furthermore, a contract award may not be made based solely on price.

3.3 RFP Schedule

<u>Date/Time</u>	<u>Activity</u>
February 5, 2024	Issue RFP
February 20, 2024 5:00 p.m.	Deadline for written questions about RFP
March 4, 2024 5:00 p.m.	Proposals Due
Estimated week of March 4, 2024	Review of proposals by evaluation panel
Estimated week of March 18, 2024	Consultant interviews (if necessary)
Estimated week March 25, 2024	Final ranking of proposals; negotiations and selection of recommended Consultant
Estimated April 11, 2024	Consultant contract presented to C/CAG Board of Directors for approval

Attachments

<u>Attachment A</u>	MTC Resolution 4514
<u>Attachment B</u>	Sample Cost Proposal
<u>Attachment C</u>	LAPM Exhibit 10-O1 Consultant DBE Commitment, Exhibit 15-H Good Faith Effort, 10-Q Disclosure of Lobbying Activities ¹
<u>Attachment D</u>	MTC and C/CAG Master Agreement and MTC Program Supplement
<u>Attachment E</u>	Study Area Equity Priority Communities Exhibit

¹ Forms also available on Caltrans website - <https://dot.ca.gov/programs/local-assistance/forms/local-assistance-procedures-manual-forms>