

AGREEMENT BETWEEN CITY/COUNTY ASSOCIATION OF GOVERNMENTS OF SAN MATEO COUNTY AND ECOLOGY ACTION

This Agreement is entered into by and between the City/County Association of Governments of San Mateo County, a joint powers agency whose members include the County of San Mateo and the twenty incorporated cities and towns within San Mateo County (“C/CAG”) and Ecology Action (“Consultant”) (together the “Parties”) on March 16, 2026.

RECITALS

C/CAG is the Congestion Management Agency for San Mateo County; and

C/CAG has determined that consultant services are needed to assist C/CAG with Bikeshare Education and Marketing Campaign Program Services; and

The purpose of the Bikeshare Education and Marketing Campaign Program is to implement the strategies identified in the C/CAG Bike & Scooter Share Marketing Plan & Branding Toolkit and to develop additional complementary outreach activities, as appropriate, and to promote existing Bay Area Bike Share programs in San Mateo County. The scope of work will emphasize multilingual, equity-focused education, marketing, and program enrollment support; and

C/CAG has determined that Consultant has the requisite qualifications to perform this work; and

The total amount available to Consultant under this Agreement is not to exceed \$110,000; and

The source of those funds are non-federal and include \$100,000 from the San Mateo County Transportation Authority Pedestrian and Bicycle Grant Program cycle 7, and \$10,000 authorized as match funding by the C/CAG Board of Directors from the Congestion Relief Program; and By adoption of Resolution 26-09, the C/CAG Board of Directors authorized the C/CAG Executive Director to execute an agreement with Consultant to provide the services described in Exhibit A, Scope of Work.

NOW, THEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. **Services to be provided by Consultant.** In consideration of the payments set forth in this Agreement and in Exhibit B, Consultant shall provide services for C/CAG in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibit A, Scope of Work, attached hereto (the “Services”).

In the performance of its services, Consultant represents that it has and will exercise the degree of professional care, skill, efficiency, and judgment of consultants with special expertise in providing such services, and Consultant represents that it carries and will maintain all applicable licenses, certificates, and registrations needed for the work in current and good standing.

2. **Payments.** In consideration of the services rendered with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, C/CAG shall make payment to Consultant based on the rates and in the manner specified in Exhibit B, Project Budget. C/CAG reserves the right to withhold payment if C/CAG determines that the quantity or quality of the work performed is unacceptable. In no event shall C/CAG’s total fiscal obligation under this agreement exceed one hundred and ten thousand dollars (\$110,000). Payments shall be made to Consultant monthly, upon submission of an invoice by Consultant that has been reviewed and approved by C/CAG and identifies expenditures and describes services performed and percentage of deliverables completed. C/CAG shall have the right to receive, upon request, documentation substantiating charges billed to C/CAG.

3. **Term.** Subject to compliance with all terms and conditions, the term of this Agreement shall be from March 16, 2026 to March 16, 2028.
4. **Termination.** This Agreement may be terminated by the C/CAG Executive Director at any time for any reason by providing 30 days' notice to Consultant. Subject to availability of funding, Consultant shall be paid for all services provided prior to termination of the Agreement. Such payment shall be that prorated portion of the full payment determined by comparing the work actually completed to the work required by the Agreement.

C/CAG may terminate this Agreement or a portion of the services referenced in the Exhibits based on the unavailability of federal, State, or other outside funds by providing written notice to Consultant as soon as is reasonably possible after C/CAG learns of said unavailability of outside funding.

C/CAG may also terminate this Agreement for cause. In order to terminate for cause, C/CAG must first give Consultant notice of the alleged breach. Consultant shall then have five business days after receipt of such notice to respond and a total of ten calendar days after receipt of such notice to cure the alleged breach. If Consultant fails to cure the breach within this period, C/CAG may immediately terminate this Agreement without further action. The option available in this paragraph is separate from the ability to terminate without cause with appropriate notice described above. In the event that C/CAG provides notice of an alleged breach pursuant to this section, C/CAG may, in extreme circumstances, immediately suspend performance of services and payment under this Agreement pending the resolution of the process described in this paragraph. C/CAG has sole discretion to determine what constitutes an extreme circumstance for purposes of this paragraph, and C/CAG shall use reasonable judgment in making that determination.

5. **Progress Reports.** Consultant shall provide C/CAG with progress reports according to the schedule and form approved by the C/CAG Project Manager.
6. **Key Personnel.** The key personnel to be assigned to this work by the Consultant and, if applicable, their estimated hourly rates and the estimated hours to be supplied by each are set forth in Exhibit C, Key Personnel Assignments, attached hereto and incorporated herein by this reference. Substitution of any of the personnel named in Exhibit C or a decrease in the hours provided to the project by such personnel of more than 15% requires the prior written approval of the C/CAG Project Manager or a designee. Consultant shall maintain records documenting compliance with this Section, and such records shall be subject to the audit requirements of Section 14. Consultant agrees that all personnel assigned to this work will be professionally qualified for the assignment to be undertaken. C/CAG reserves the right to direct removal of any individual, including key personnel, assigned to this work.
7. **Contract Materials.** Upon expiration or termination of this Agreement, all finished or unfinished documents, data, studies, maps, photographs, reports, and other written materials (collectively referred to as "contract materials") prepared by Consultant under this Agreement shall become the property of C/CAG and shall be promptly delivered to C/CAG. Upon termination, Consultant may make and retain a copy of such contract materials if permitted by law. Consultant shall not be liable for C/CAG's use, modification or re-use of products without Consultant's participation or for purposes other than those specifically intended pursuant to this Agreement.
8. **Relationship of the Parties.** Consultant agrees and understands that the work and/or services performed under this Agreement are performed as an independent contractor and not as an employee of C/CAG and that neither Consultant nor its employees acquire any of the rights, privileges, powers, or advantages of C/CAG employees.
9. **Assignability and Subcontracting.** Consultant shall not assign this Agreement or any portion of it to a third party, or subcontract with a third party, to provide services required by Consultant without the prior written consent of the C/CAG Executive Director. Any such assignment or subcontract without the C/CAG Executive

Director's prior written consent shall give C/CAG the right to automatically and immediately terminate this Agreement without penalty or advance notice.

10. Hold Harmless/Indemnity.

- a. *General.* Consultant shall indemnify and hold harmless C/CAG and its officers, agents, employees, and servants from and against any and all claims, suits, or actions of every name, kind, and description resulting from this Agreement, the performance of any work or services required of Consultant under this Agreement, or payments made pursuant to this Agreement brought for, or on account of, any of the following: (A) injuries to or death of any person, including Consultant or its employees/officers/agents; (B) damage to any property of any kind whatsoever and to whomsoever belonging; (C) any sanctions, penalties, or claims of damages resulting from Consultant's failure to comply, if applicable, with the requirements set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended; or (D) any other loss or cost, including but not limited to that caused by the concurrent active or passive negligence of C/CAG and/or its officers, agents, employees, or servants. However, Consultant's duty to indemnify and hold harmless under this Section shall not apply to injuries or damage for which C/CAG has been found in a court of competent jurisdiction to be solely liable by reason of its own negligence or willful misconduct.

The duty of Consultant to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

- b. *Intellectual Property.* Consultant hereby certifies that it owns, controls, and/or licenses and retains all right, title, and/or interest in and to any intellectual property it uses in relation to this Agreement, including the design, look, feel, features, source code, content, and/or other technology relating to any part of the services it provides under this Agreement and including all related patents, inventions, trademarks, and copyrights, all applications therefor, and all trade names, service marks, know how, and trade secrets (collectively referred to as "IP Rights") except as otherwise noted by this Agreement.

Consultant warrants that the services it provides under this Agreement do not infringe, violate, trespass, or constitute the unauthorized use or misappropriation of any IP Rights of any third party. Consultant shall defend, indemnify, and hold harmless C/CAG from and against all liabilities, costs, damages, losses, and expenses (including reasonable attorney fees) arising out of or related to any claim by a third party that the services provided under this Agreement infringe or violate any third-party's IP Rights provided any such right is enforceable in the United States. Consultant's duty to defend, indemnify, and hold harmless under this Section applies only provided that: (a) C/CAG notifies Consultant promptly in writing of any notice of any such third-party claim; (b) C/CAG cooperates with Consultant, at Consultant's expense, in all reasonable respects in connection with the investigation and defense of any such third-party claim; (c) Consultant retains sole control of the defense of any action on any such claim and all negotiations for its settlement or compromise (provided Consultant shall not have the right to settle any criminal action, suit, or proceeding without C/CAG's prior written consent, not to be unreasonably withheld, and provided further that any settlement permitted under this Section shall not impose any financial or other obligation on C/CAG, impair any right of C/CAG, or contain any stipulation, admission, or acknowledgement of wrongdoing on the part of C/CAG without C/CAG's prior written consent, not to be unreasonably withheld); and (d) should services under this Agreement become, or in Consultant's opinion be likely to become, the subject of such a claim, or in the event such a third party claim or threatened claim causes C/CAG's reasonable use of the services under this Agreement to be seriously endangered or disrupted, Consultant shall, at Consultant's option and expense, either: (i) procure for C/CAG the right to continue using the services without infringement or (ii) replace or modify the services so that they become non-infringing but remain functionally equivalent.

Notwithstanding anything in this Section to the contrary, Consultant will have no obligation or liability to C/CAG under this Section to the extent any otherwise covered claim is based upon: (a) any aspects of the services under this Agreement which have been modified by or for C/CAG (other than modification performed by, or at the direction of, Consultant) in such a way as to cause the alleged infringement at issue; and/or (b) any aspects of the services under this Agreement which have been used by C/CAG in a manner prohibited by this Agreement.

The duty of Consultant to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

11. Insurance.

- a. *General Requirements.* Consultant or its subconsultants performing the services on behalf of Consultant shall not commence work under this Agreement until all insurance required under this section has been obtained. Consultant shall use diligence to obtain such insurance. Consultant shall furnish C/CAG with Certificates of Insurance evidencing the required coverage and there shall be a specific contractual liability endorsement extending Consultant’s coverage to include the contractual liability assumed by Consultant pursuant to this Agreement. These Certificates shall specify or be endorsed to provide that thirty (30) days’ notice must be given, in writing, to C/CAG of any pending change in the limits of liability or of non-renewal, cancellation, or modification of the policy.
- b. *Workers’ Compensation and Employer’s Liability Insurance.* Consultant shall have in effect, during the entire life of this Agreement, Workers’ Compensation and Employer’s Liability Insurance providing full statutory coverage. In signing this Agreement, Consultant certifies, as required by Section 1861 of the California Labor Code, that (a) it is aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for workers’ compensation or to undertake self-insurance in accordance with the provisions of the Labor Code, and (b) it will comply with such provisions before commencing the performance of work under this Agreement.
- c. *Liability Insurance.* Consultant shall take out and maintain during the life of this Agreement such Bodily Injury Liability and Property Damage Liability Insurance as shall protect Consultant, its employees, officers and agents while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage that may arise from Consultant’s operations under this Agreement, whether such operations be by Consultant or by any sub-consultant or by anyone directly or indirectly employed by either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall be not less than \$1,000,000.
- d. *Insurance Limits; Insured Entities; Breach.* Required insurance shall include:
 - (a) Comprehensive General Liability..... \$1,000,000
 - (b) Workers’ Compensation..... Statutory
 - (c) Motor Vehicle Liability Insurance..... \$1,000,000
 - (d) Professional Liability..... \$1,000,000

C/CAG and its officers, agents, employees and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that the insurance afforded thereby to C/CAG, its officers, agents, employees, and servants shall be primary insurance to the full limits of

liability of the policy, and that if C/CAG, or its officers, agents, employees, and servants have other insurance against a loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, the C/CAG Chairperson, at his/her option, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work and payment pursuant to this Agreement.

12. **Compliance with All Laws.** All services to be performed by Consultant pursuant to this Agreement shall be performed in accordance with all applicable federal, state, San Mateo County, and municipal laws, ordinances, regulations, and executive orders, including but not limited to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the federal regulations promulgated thereunder, as amended (if applicable), the Americans with Disabilities Act of 1990, as amended, and Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination on the basis of disability in programs and activities receiving any federal financial assistance, as well as any required economic or other sanctions imposed by the United States government or under state law in effect during the term of the Agreement. In the event of a conflict between the terms of this Agreement and any applicable State, federal, San Mateo County, or municipal law, regulation, or executive order, the requirements of the applicable law, regulation, or executive order will take precedence over the requirements set forth in this Agreement.

Consultant will timely and accurately complete, sign, and submit all necessary documentation of compliance with this Section.

13. **Non-discrimination.**

- a. *General.* Consultant and any subconsultants performing services on behalf of Consultant shall not discriminate or permit discrimination against any person or group of persons on the basis of race, color, national origin, ancestry, age, disability (physical or mental), sex, sexual orientation, gender identity, marital or domestic partner status, religion, political beliefs or affiliation, familial or parental status (including pregnancy), medical condition, military service, or genetic information, or in any manner prohibited by federal, state or local laws.
- b. *Discrimination Against Individuals with Disabilities.* The nondiscrimination requirements of 41 C.F.R. 60-741.5(a) are incorporated into this Agreement as if fully set forth here, and Contractor and any subcontractor shall abide by the requirements of 41 C.F.R. 60-741.5(a). **This regulation prohibits discrimination against qualified individuals on the basis of disability and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.**

14. **Substitutions.** If particular persons or classifications are identified in Exhibit A as providing services under this Agreement, Consultant will not assign others to work in their place without the prior written consent of the C/CAG Executive Director. Any substitution shall be with a person or classification of commensurate experience and knowledge unless otherwise authorized by the C/CAG Executive Director.

15. **Record Retention; Right to Monitor and Audit.**

- a. Consultant shall maintain all required records relating to services provided under this Agreement for three (3) years after C/CAG makes final payment and all other pending matters are closed, and Consultant shall be subject to the examination and/or audit by C/CAG, a federal grantor agency, and/or the State of California.

- b. Consultant shall comply with all program and fiscal reporting requirements set forth by applicable federal, State, and local agencies and as required by C/CAG.
- c. Consultant agrees upon reasonable notice to provide to C/CAG or its authorized representative, to any Federal or State department having monitoring or review authority, and/or to any of their respective audit agencies access to and the right to examine all records and documents necessary to determine compliance with relevant Federal, State, and local statutes, rules, and regulations, to determine compliance with this Agreement, and to evaluate the quality, appropriateness, and timeliness of services performed.

16. Debarment and Suspension Certification

- a. The Consultant's signature affixed herein shall constitute a certification under penalty of perjury under the laws of the State of California, that the Consultant or any person associated therewith in the capacity of owner, partner, director, officer or manager:
 - 1. Is not currently under suspension, debarment, voluntary exclusion, or determination of eligibility by any federal agency;
 - 2. Has not been suspended, debarred, voluntarily excluded, or determined ineligible by any federal agency within the past three (3) years;
 - 3. Does not have a proposed debarment pending; and
 - 4. Has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.
 - b. Any exceptions to this certification must be disclosed to C/CAG. Exceptions will not necessarily result in denial of recommendation for award, but will be considered in determining responsibility. Disclosures must indicate the party to whom the exceptions apply, the initiating agency, and the dates of agency action.
 - c. Exceptions to the Federal Government excluded parties (<https://sam.gov/content/home>) maintained by the U.S. General Services Administration are to be determined by FHWA.
- 17. Permits/Licenses.** If any license, permit, or approval is required to perform the work or services required by this Agreement, Consultant bears the responsibility to obtain said license, permit, or approval from the relevant agency at Consultant's own expense prior to commencement of said work/services. Failure to do so will result in forfeit of any right to compensation under this Agreement.
- 18. Merger Clause; Amendments.** This Agreement, all Exhibits and other attachments incorporated by reference, constitutes the sole agreement of the Parties with regard to the matters covered in this Agreement, and correctly states the rights, duties and obligations of each party as of the document's date. In the event that any term, condition, provision, requirement, or specification set forth in the body of this Agreement conflicts with or is inconsistent with any term, condition, provision, requirement, or specification in any exhibit or attachment to this Agreement, the provisions of the body of the Agreement shall prevail. Any prior agreement, promises, negotiations or representations between the Parties not expressly stated in this Agreement are not binding. All subsequent modifications or amendments shall be in writing and signed by the Parties.
- 19. Controlling Law; Venue.** This Agreement shall be governed by the laws of the State of California, without regard to its choice of law rules. Any dispute arising out of this Agreement shall be venued either in the San Mateo County Superior Court or in the United States District Court for the Northern District of California.

20. **Notices.** Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when both: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of C/CAG, to:

City/County Association of Governments of San Mateo County
555 County Center, 5th Floor
Redwood City, CA 94063
Attention: [NAME]
Email: [EMAIL]

In the case of Consultant, to:

Ecology Action
877 Cedar Street, Ste 240
Santa Cruz, CA 95060
Attention: Jennifer Lape
Email: jlape@ecoact.org

21. **Electronic Signature.** Both C/CAG and Consultant wish to permit this Agreement and future documents relating to this Agreement to be digitally signed in accordance with California law.

In witness of and in agreement with this Agreement's terms and conditions, the Parties, by their duly authorized representatives, affix their respective signatures.

[NAME] (Consultant)

By _____ Date _____

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

By _____ Date _____
Adam Rak
C/CAG Chair

C/CAG Legal Counsel

By _____
Melissa Andrikopoulos, C/CAG Counsel

Exhibit A

SCOPE OF WORK

In consideration of the payments set forth in Exhibit B, Consultant shall provide the following services:

Ecology Action will implement an eight-month, multilingual, equity-focused education and marketing campaign for bikesharing in San Mateo County, followed by program evaluation and closeout. The work plan below is organized by tasks and subtasks to reflect the timeframes and deliverables shown in the schedule of products.

Task 1: Project Management & Coordination

Task 1.1: Organize a project kickoff meeting with C/CAG

Ecology Action will lead a 60-minute kickoff meeting with C/CAG staff to outline project governance and ensure scope, schedule, and quality stay on track through transparent reporting and approvals. This will include confirmation of decision-makers and points of contact, communications and creative approval workflows, review of the draft project schedule included in the proposal, and alignment on data-sharing and tools.

Task 1.1 Deliverables:

- Kickoff meeting summary.

Task 1.2: Prepare a detailed project schedule

Ecology Action will develop a detailed, implementation-ready project schedule that translates the approved scope, timeline, and deliverables into a clear, actionable roadmap for day-to-day execution. This schedule will serve as the primary coordination tool for C/CAG staff, project partners, and the Ecology Action team, ensuring alignment across outreach, creative production, media deployment, educational events, evaluation, and approvals.

Building on the initial kickoff discussions (Task 1.1), the project schedule will integrate the approved scope of work, schedule of products, and key external dependencies, including bikeshare system availability, anticipated station expansions, seasonal travel patterns, partner event calendars, and board or committee meeting dates. The schedule will clearly identify task sequences, dependencies, internal and external review periods, and decision points to minimize delays and avoid last-minute bottlenecks.

The detailed schedule will include the following elements:

- Task- and subtask-level timelines aligned with all numbered tasks and deliverables in the contract and schedule of products.
- Designated review and approval windows for receiving C/CAG and partner feedback, including translation and quality-assurance steps.

- A campaign communications calendar that coordinates creative development, multilingual translation, paid media flights, influencer activity, community outreach, education workshops, rider trainings, and the Community Challenge.
- Milestone markers for key deliverables, presentations, and evaluation checkpoints.
- Clear assignment of responsibilities for Ecology Action staff, partners, and collaborators to support accountability and coordination.

The schedule will be designed as a living management tool rather than a static document. Ecology Action will maintain and update the schedule as needed throughout the project in coordination with C/CAG, using it to track progress, anticipate risks, manage changes, and support transparent communication during biweekly coordination meetings.

Task 1.2 Deliverables:

- Final work plan and schedule.

Task 1.3: Participate in recurring biweekly coordination meetings

Ecology Action will participate in biweekly coordination meetings throughout the duration of the project, with a status report outlining wins from the previous two weeks, KPIs, open approvals, upcoming launches, risks and decisions, and next-week commitments.

Task 1.4: Provide monthly updates summarizing progress, deliverables, and expenditures

Ecology Action will prepare and send a one-page progress memo sharing activities completed, KPI snapshot (by language and channel), risks, mitigation measures, next month's plan, budget burn rate, and expenditures. Monthly reports will continue through project close.

Task 1.4 Deliverables:

- Monthly progress memos.

Task 1.5: Submit monthly invoices

Ecology Action will submit monthly invoices that comply with C/CAG requirements. Monthly reports will continue through project close.

Task 1.5 Deliverables:

- Monthly invoicing.

Task 2: Develop Bikeshare Education and Marketing Campaign Program Plan and Schedule

Task 2.1: Prepare an updated Bikeshare Education and Marketing Campaign Program plan

Ecology Action will conduct a structured, implementation-focused review of the existing C/CAG Bike & Scooter Share Marketing Plan & Branding Toolkit, incorporating all edits, comments, and additions documented in the current living version. The purpose of this task is not to recreate or reinterpret the plan, but to translate it into an execution-ready Bikeshare Education and Marketing Campaign Program plan and schedule that reflects current program conditions, operational realities, and near-term outreach needs.

The review process will begin with a holistic assessment of the updated toolkit, focusing on elements that affect day-to-day implementation, including audience priorities, equity focus areas, messaging guidance, brand tone, visual standards, language considerations, partner roles, and assumptions related to pricing, discounts, system functionality, and station availability. Ecology Action will cross-reference these elements against current program conditions—including anticipated bikeshare expansions, seasonal ridership patterns, operator processes, and community context—to identify where implementation guidance should be clarified, added, or adjusted.

Building from this review, Ecology Action will prepare an updated Bikeshare Education and Marketing Campaign Program plan and schedule that operationalizes the toolkit through clearly defined strategies, tactics, and timelines. The updated program plan will further the following objectives:

- Translate brand and messaging guidance into approved, modular message blocks that can be deployed across multilingual outreach, media channels, educational events, and partner communications.
- Define priority audiences and geographies based on equity focus areas, ridership opportunity, transit connections, and community input.
- Outline multilingual implementation pathways that integrate translation, cultural adaptation, and quality-assurance workflows across English, Spanish, Chinese, and Tagalog.
- Specify barrier-reducing engagement strategies, including enrollment support, hands-on education, trusted messenger activation, and simplified “how-to” guidance.
- Coordinate media, outreach, and education activities into a unified campaign sequence aligned with the detailed project schedule (Task 1.2).
- Identify decision points, review windows, and dependencies to ensure smooth coordination with C/CAG staff, partners, and the bikeshare operator.

The draft program plan and schedule will be submitted to C/CAG for review and will include up to two structured rounds of revisions, allowing time for staff feedback, clarification of assumptions, and alignment with evolving program conditions. Ecology Action will incorporate feedback efficiently, using version control and a coordinated review process to maintain schedule integrity while ensuring the final plan reflects shared priorities and expectations.

The finalized program plan and schedule will serve as the central implementation blueprint for all subsequent outreach, media, education, and evaluation tasks, ensuring consistency across channels, languages, and partners throughout the campaign period.

Task 2.1 Deliverables:

- Draft and final version of the Bikeshare Education and Marketing Campaign Program plan and schedule (with two rounds of edits).

Task 2.2: Develop a performance-tracking framework

Ecology Action will develop a practical, decision-oriented performance-tracking framework that directly supports implementation, learning, and accountability throughout the Bikeshare Education and Marketing Campaign. The framework will be explicitly aligned with the finalized program plan and schedule (Task 2.1) and designed to monitor campaign effectiveness across engagement, demographic reach, equity outcomes, enrollment, and ridership trends, to the extent that data are available from the bikeshare operator and C/CAG.

The framework will begin with identification of clear key performance indicators (KPIs) mapped to each major campaign objective, including awareness building, membership enrollment, first-ride completion, repeat ridership, and equity-segment participation. KPIs will be structured to reflect both quantitative measures (e.g., impressions, click-throughs, enrollments) and qualitative indicators (e.g., focus group insights, participant feedback) to reveal a fuller picture of campaign performance—particularly within priority communities.

Ecology Action will design the framework around available and realistic data sources, recognizing that enrollment and ridership data are ultimately provided by the bikeshare operator and C/CAG. Rather than duplicating data collection, the framework will align with existing data systems and supplement them with lightweight, campaign-level attribution tools. This approach allows campaign activities to connect to outcomes without introducing unnecessary data burden or privacy concerns.

To support active project management and optimization, the performance-tracking framework will define the following reporting elements:

- A core KPI set tied to campaign goals and equity priorities.
- Data sources and assignment of responsibilities for each metric.
- Reporting cadence (monthly snapshots, mid-project evaluation, final report).
- Equity disaggregation parameters, such as language, geography (including equity focus areas), and outreach channels where data are available.
- Feedback loops that link performance findings to tactical recommendations and adjustments.

The finalized framework will provide the foundation for monthly progress reporting (Task 1.4), the mid-project evaluation memo (Task 4.2), and the final campaign performance report (Task 4.3), ensuring consistency, transparency, and usefulness of data across the project lifecycle.

Task 2.2 Deliverables:

- Performance-tracking framework.

Task 2.3: Introduce the program plan and schedule to C/CAG staff

Ecology Action will prepare and deliver a clear, implementation-focused presentation of the finalized Bikeshare Education and Marketing Campaign Program plan and schedule to designated C/CAG staff. This briefing is intended to confirm shared understanding of the campaign strategy, implementation

sequencing, equity priorities, performance metrics, and coordination protocols prior to full campaign launch.

Task 2.3 Deliverables:

- Presentation materials for C/CAG staff, and the C/CAG board of directors.

Task 2.4: Present the program plan and schedule to the board of directors, as requested

If asked to do so by C/CAG, Ecology Action will adapt the staff presentation into a concise, board-appropriate briefing for the C/CAG Board of Directors. This presentation will be designed to clearly communicate the goals, value, and anticipated outcomes of the Bikeshare Education and Marketing Campaign, with an emphasis on equity, fiscal responsibility, and measurable public benefit.

Task 3: Implement Bikeshare Education and Marketing Campaign Program

Task 3.1: Conduct multilingual and equity-focused outreach and engagement

Ecology Action will implement an on-the-ground, multilingual outreach and engagement program designed to reduce barriers to bikeshare participation and support enrollment and first-time use among low-income residents, communities of color, and public transit-dependent populations. This task translates the equity-focused approach outlined in the program plan into high-touch, trust-based engagement activities that meet people where they are—both geographically and culturally.

Outreach will begin with identification and activation of trusted community touchpoints, including community-based organizations, transit hubs, neighborhoods near bikeshare stations, libraries, community colleges, and high-foot-traffic events. Ecology Action will coordinate closely with C/CAG, the bikeshare operator, and local partners to align outreach deployment with station availability, service updates, and seasonal travel patterns.

All outreach materials and interactions will be provided in English, Spanish, Chinese, and Tagalog, using culturally adapted messaging and plain-language visuals. Engagement will prioritize barrier reduction, with staff providing hands-on enrollment assistance, step-by-step “how-to” guidance, and clear explanations of pricing, discounts, and trip basics—particularly for residents who may be less digitally engaged or unfamiliar with app-based mobility services.

Throughout implementation, Ecology Action will track participation, language access needs, and enrollment outcomes to ensure outreach efforts are reaching priority communities effectively. Insights from field staff and participants will be shared through monthly progress updates and used to adjust outreach locations, timing, and messaging as needed.

Task 3.1 Deliverables:

- Multilingual outreach materials.

Task 3.2: Launch media, advertising, and digital communications

Ecology Action will execute a coordinated media, advertising, and digital communications campaign to amplify outreach efforts, drive enrollment, and reinforce consistent bikeshare messaging across channels and languages. This task operationalizes the integrated communications strategy defined in the program plan and ensures that campaign touchpoints work together to move residents from awareness to action.

The campaign will be guided by a shared communications calendar that aligns paid media launches, outreach events, partner amplification, influencer activity, and the Community Challenge. Approved messaging will be organized into modular message blocks—such as system basics, pricing and discounts, safety and comfort, transit integration, and key benefits—allowing for rapid adaptation across formats while maintaining brand consistency and equity-centered framing.

Media and communications activities will include the following:

- Paid digital advertising, including multilingual paid social campaigns designed to drive program awareness, discount discovery, and membership enrollment, with iterative testing and optimization.
- Selective radio, print, and digital placements, including multicultural and community media, to reach audiences who are less likely to be reached through digital channels alone.
- Partner and owned channels, including e-blasts, social media toolkits, and ready-to-share graphics for C/CAG member agencies and community partners.
- Physical outreach materials, including posters and flyers with QR codes linking to language-specific enrollment pages or directly to the bikeshare app for distribution at outreach sites and community locations.

Performance will be monitored using UTMs, QR codes, channel-specific links, and enrollment attribution prompts to connect communications activities with trips taken. Ecology Action will review results regularly and adjust creative plans, targeting, and channel mix as needed to improve effectiveness and reach within priority communities.

Task 3.2 Deliverables:

- Digital communications package, advertising assets package, and physical outreach package.

Task 3.3: Execute influencer/ambassador outreach

Ecology Action will implement an influencer and ambassador outreach strategy to extend campaign reach through trusted, community-based voices and normalize bikesharing among priority audiences. This approach builds on the understanding that peer-to-peer storytelling and relatable, organic content can prove especially effective in engaging communities that have historically been underrepresented in shared mobility programs.

Ecology Action will identify and contract with one to two Bay Area-based influencers or community ambassadors who reflect the demographics, languages, and lived experiences of equity focus areas. Selection criteria will include audience relevance, engagement quality, cultural credibility, and alignment with the campaign's equity and accessibility goals.

Influencers and ambassadors will be supported with the following assets:

- Clear content guidelines aligned with the Branding Toolkit, campaign message blocks, and branded graphics.
- Multilingual prompts and calls to action tied to enrollment and first-ride opportunities.
- Monthly access to bikeshare memberships to support authentic, hands-on content creation.
- Unique links or codes to support basic performance tracking.

Ambassador content will be strategically scheduled to coincide with outreach pushes, educational events, and the Community Challenge, reinforcing campaign messages through relatable, real-world perspectives. Ecology Action will track reach, engagement, and downstream enrollment indicators to assess effectiveness and inform adjustments.

This influencer strategy complements, rather than replaces, community-based outreach and education—providing an additional layer of social proof and visibility to support ongoing enrollment and ridership growth.

Task 3.3 Deliverables:

- Influencer/ambassador partnership agreements, content guidelines, delivered content, and activity summary.

Task 3.4: Hold one Community Challenge event

Ecology Action's will plan and launch one Community Challenge event intended to motivate new riders to use the bikeshare system as frequently as possible over a designated month or chosen timeframe.

The challenge will incorporate the following:

- Low-barrier entry (simple registration, clear “how it works” description, first-ride guidance).
- Weekly milestones and “mini-wins” to keep people engaged.
- Incentives and prizes that are simple, visible, and motivating.
- Social motivation (team/community pride, partner amplification, recognition, friendly competition).
- Clear progress metrics so riders can see their impact and keep going.

To maximize reach and impact, Ecology Action will work with Bay Wheels and Commute.org to promote and track the progress of the challenge, streamline access for new riders, and utilize existing trip data systems to monitor participation. The challenge will be tailored to meet riders where they are by offering multilingual content, easy registration, and culturally relevant promotions to maximize participation across diverse communities — especially riders in equity focus areas and those newer to shared mobility tools.

Task 3.4 Deliverables:

- Community Challenge event plan, promotional materials, and tracking/reporting summaries.

Task 3.5: Conduct one public bikeshare education workshop with a community-based organization

Ecology Action will organize one public bikeshare education workshop in partnership with a trusted community-based organization (for example, the Silicon Valley Bicycle Coalition or a similar local partner). Ecology Action will use a hands-on, community-centered approach designed to welcome monolingual, low-income, and underserved residents. The workshop will accomplish three things at once:

- (1) help people feel more comfortable with bikesharing, and
- (2) increase rider safety, and
- (3) gather practical feedback on accessibility, affordability, and service availability.

Ecology Action will use interactive, low-pressure activities such as barrier-busting stations, a “first ride” walk-through, quick dot-voting on potential improvements, and short feedback-generating prompts.

Ecology Action will also make sure the workshop supports the broader campaign. That includes creating clear promotional messaging, partner-ready outreach materials, and a feedback capture process that will translate into concrete improvements and measurable results.

Task 3.5 Deliverables:

- Materials and curriculum for one bikeshare education workshop with a CBO, as well as a summary report from the bikeshare education workshop.

Task 3.6: Organize two rider-education training events

Ecology Action will design and deliver two public bikeshare education training events to improve user confidence, strengthen safety practices, and increase effective use of the bikeshare and scootershare systems available within Daly City. These trainings will leverage existing community events to maximize reach, reduce participation barriers, and engage diverse audiences—including low-income residents, transit-dependent populations, and multilingual communities.

Ecology Action will identify two to four suitable Daly City community events, confirm the logistics with event organizers, and coordinate closely with Bay Wheels, C/CAG staff, and other community partners. Ecology Action’s active transportation programming includes safety education and training formats designed to build confidence and practical skills—especially for riders who are newer to biking or navigating streets safely.

The Adult Bike Education team will refine the hands-on bicycle curriculum to cover core riding skills, helmet fitting, safety practices, bikeshare system navigation, trip start-and-end procedures, and available pricing and subsidy programs. Materials will be engaging and accessible in English, Spanish, Chinese, and Tagalog. When space and logistics allow, we can also incorporate on-bike education led by certified instructors to reinforce skills in a real-world setting.

Marketing and digital support will be built into the trainings. Education delivery will be paired with practical campaign support in the following ways:

- Clear event promotion (digital + partner channels) and simple registration steps.
- Multilingual “what to expect” and “how to use bikesharing” takeaways.

- Post-event follow-ups and partner toolkits to keep momentum going.
- Lightweight tracking (QR codes/links + attendance + quick feedback prompts) to inform reporting and improvements.

Task 3.6 Deliverables:

- Materials and curriculum for two rider-education training events, as well as summary reports on these events.

Task 4: Performance Tracking, Evaluation, and Final Reporting

Task 4.1: Hold three paid focus groups with low-income residents

Ecology Action will design and conduct three paid focus groups with low-income residents to gather qualitative insights on bikesharing awareness, enrollment experiences, perceived barriers, and factors influencing first-time and repeat use. These focus groups will provide essential, community-centered feedback to complement quantitative performance data and support equity-driven optimization of the campaign.

Each focus group will be conducted in attendees' language—Spanish, Chinese (Cantonese or Mandarin, as appropriate), and Tagalog—and will include 8–10 participants recruited through trusted community-based organizations and outreach partners. Ecology Action will manage recruitment, logistics, facilitation, interpretation, stipends, and documentation to ensure participation is accessible, comfortable, and respectful.

Focus group discussion guides will be designed to explore the following topics:

- Awareness and understanding of bikesharing and related incentives.
- Messaging clarity and resonance across languages and channels.
- Barriers related to cost, trust, safety, technology, or system complexity.
- Enrollment and first-ride experiences.
- Perceived value of outreach, media, and educational activities.
- Suggestions for improving accessibility and usability.

All sessions will be facilitated by trained Ecology Action staff using inclusive, trauma-informed facilitation practices and community-based social marketing principles. Ecology Action will synthesize findings across the three focus groups, identifying common themes as well as language- or community-specific insights.

Task 4.1 Deliverables:

- Recruitment materials, facilitation guides, and three focus group summary memos.

Task 4.2: Produce mid-project evaluation memo

Ecology Action will prepare a mid-project evaluation memo to assess interim campaign performance and inform final-phase adjustments. This memo will synthesize quantitative performance data, qualitative

findings from Task 4.1, and ongoing campaign analytics to evaluate progress toward program goals at the midpoint of implementation.

The evaluation will draw upon the following data sources:

- Available enrollment and ridership data provided by the bikeshare operator and C/CAG.
- Campaign analytics (digital engagement, paid media performance, QR/UTM tracking).
- Outreach participation and assisted enrollment records.
- Focus group findings and field staff observations.

The memo will evaluate performance across several key dimensions:

- Engagement and enrollment trends by channel and language.
- Equity outcomes by geography and priority populations, where data is available.
- Effectiveness of messaging, outreach formats, and enrollment support strategies.
- Alignment between planned activities and observed results.

Ecology Action will develop clear, actionable recommendations for tactical adjustments during the remaining campaign period—such as shifts in channel emphasis, messaging refinements, or changes to outreach deployment—so lessons learned can be applied in real time.

The mid-project evaluation memo will be provided in two draft iterations, followed by a final version incorporating C/CAG feedback.

Task 4.2 Deliverables:

- Mid-project evaluation memo (two drafts and final version).

Task 4.3: Produce a full performance report

At the conclusion of the campaign, Ecology Action will prepare a comprehensive campaign performance report documenting implementation activities, outcomes, equity impacts, and lessons learned. This report will serve as the primary record of the bikeshare education and marketing campaign and a resource to inform future C/CAG bikeshare expansions and outreach investments.

The report will synthesize all available data and insights, including the following:

- Campaign objectives and implementation overview.
- Media, outreach, education, and influencer activities delivered.
- Enrollment, ridership, and engagement results (to the extent that data are available).
- Equity-focused analysis of reach and outcomes by language, geography, and audience.
- Key findings from focus groups and qualitative feedback.
- Assessment of what strategies proved most effective—and why.

In addition to documenting results, the report will include forward-looking recommendations for improving bikeshare education, outreach, and adoption in future phases, with attention to scalability, sustainability, and equity.

Ecology Action will submit two draft versions of the performance report for review, followed by a final version incorporating C/CAG feedback. Presentation-ready materials will be developed separately under Task 2 and Task 4 as requested.

Task 4.3 Deliverables:

- Final campaign performance report (two drafts and a final version).

Task 4.4: Provide all files, datasets, creative assets, research notes, and supporting materials

Ecology Action will provide C/CAG with a complete organized archive of all project materials generated throughout the campaign to support transparency, future reuse, and long-term program continuity. Files will be delivered in clearly labeled folders using common, non-proprietary formats whenever possible. Ecology Action will coordinate with C/CAG on delivery method and file-naming conventions to ensure the archive is easy to access and navigate.

Task 4.4 Deliverables:

- Full archive of all editable design files, datasets, and supporting materials.

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Exhibit B
BUDGET

In consideration of the services provided by Consultant described in Exhibit A and subject to the terms of the Agreement, C/CAG shall pay Consultant based on the following fee terms and the Cost Proposal Template, Attachment B, on page 2 of this Exhibit B:

Under no circumstances shall the amount paid by C/CAG to Consultant exceed \$110,000. Consultant shall provide C/CAG with a written itemized monthly invoice, detailed at the task level (as opposed to sub-task) that allows C/CAG to reconcile the work performed. All invoices shall include an invoice number, the agreement number, project location, dates of services and specific work completed. Invoices will be submitted no later than 30 days after the close of the month. C/CAG shall have the right to receive, upon request, documentation substantiating charges billed to C/CAG.

Payment will be made within 30 days of receipt of an acceptable invoice. C/CAG shall have the right to withhold payment if C/CAG determines the quantity and/or quality of the work performed is unacceptable.

Remit invoices to:

Matt Petrofsky
City/County Association of Governments of San Mateo County
555 County Center, 5th Floor
Redwood City, CA 94063

Federal Funding Statement?

Attachment B
 Cost Proposal Template

| TASK | DIRECT LABOR | | | | | | TOTAL HOURS | SUBTOTAL DIRECT LABOR | OVERHEAD COSTS | TOTAL COST |
|--|---|--|---|--|---|---|--------------|-----------------------|----------------------|---------------------|
| | Ecology Action Creative Director Sarah Seaward | Ecology Action Sr Digital Marketing Manager Rachel Peterson | Ecology Action Art Director Margaret Garan | Ecology Action Program Manager Tamm Kennedy | Ecology Action Program Coordinator II Romie Tejeda-Baron | Ecology Action Other personnel various | | | | |
| Task 1 - Project Management and Coordination | | | | | | | | | | |
| 1.1 Attend a project kickoff meeting with C/CAO. | 2 | 2 | | | | 5 | 9 | \$ 943.21 | \$ 624.45 | \$ 1,567.66 |
| 1.2 Prepare a detailed project schedule. | 1 | 27.5 | | | | 2 | 25.5 | \$ 2,135.69 | \$ 1,455.74 | \$ 3,591.43 |
| 1.3 Participate in recurring bi-weekly coordination meetings. | | 12 | | | | | 12 | \$ 966.36 | \$ 762.34 | \$ 1,728.70 |
| 1.4 Provide monthly updates | | 12 | | | | | 12 | \$ 966.36 | \$ 762.34 | \$ 1,728.70 |
| 1.5 Submit monthly invoices | | | | | | | 12 | \$ 951.12 | \$ 1,111.00 | \$ 2,062.12 |
| Subtotal | 3 | 48.5 | 0 | 0 | 0 | 7 | 70.5 | \$ 5,962.74 | \$ 4,715.88 | \$ 10,678.61 |
| Task 2 - Develop Bikeshare Education and Marketing Campaign Program Plan and Schedule | | | | | | | | | | |
| 2.1 Bikeshare Education and Marketing Campaign Program Plan and Schedule | 1 | 8 | | | | 4 | 13 | \$ 1,192.80 | \$ 1,040.09 | \$ 2,232.89 |
| 2.2 Develop a performance tracking framework | | 8 | | | | 2 | 10 | \$ 837.90 | \$ 635.29 | \$ 1,473.19 |
| 2.3 Present plan and schedule to C/CAO staff. | | 2 | | | | 2 | 4 | \$ 354.72 | \$ 254.11 | \$ 608.83 |
| 2.4 Present to one of the C/CAO public committees. | | 2 | | | | 2 | 4 | \$ 354.72 | \$ 254.11 | \$ 608.83 |
| Subtotal | 1 | 20 | 0 | 0 | 0 | 10 | 31 | \$ 2,740.14 | \$ 2,183.61 | \$ 4,923.75 |
| Task 3 - Implement Bikeshare Education and Marketing Campaign Program | | | | | | | | | | |
| 3.1 Multilingual & culturally competent engagement | 8 | 20 | | | | 24 | 64 | \$ 4,971.08 | \$ 4,092.42 | \$ 9,063.50 |
| 3.2 Media, advertising, and digital communications. | 12 | 40 | | | | 46 | 118 | \$ 9,016.42 | \$ 7,570.24 | \$ 16,586.66 |
| 3.3 Influencer/ambassador outreach. | | 20 | | | | 21 | 20 | \$ 1,610.60 | \$ 1,270.57 | \$ 2,881.17 |
| 3.4 One Community Challenge event. | 5 | 11 | | | | 6 | 63 | \$ 4,492.64 | \$ 3,296.08 | \$ 7,788.72 |
| 3.5 One public bikeshare education workshop. | 1 | 11 | | | | 12 | 60 | \$ 3,650.36 | \$ 2,876.40 | \$ 6,476.76 |
| 3.6 Two public bikeshare education training events. | 1 | 11 | | | | 24 | 80 | \$ 4,543.32 | \$ 3,349.72 | \$ 7,893.04 |
| 3.7 Three paid focus groups. | 4 | 26.5 | | | | 3 | 36.5 | \$ 3,079.22 | \$ 2,332.34 | \$ 5,411.56 |
| Subtotal | 31 | 129.5 | 60 | 25 | 42 | 144 | 441.5 | \$ 31,563.64 | \$ 24,737.28 | \$ 56,100.91 |
| Task 4 - Performance Tracking, Evaluation, and Final Reporting | | | | | | | | | | |
| 4.1 Mid project evaluation memo. | 1 | 4 | | | | 3 | 8 | \$ 773.85 | \$ 595.39 | \$ 1,369.24 |
| 4.2 Full performance report of the completed Program. | 1 | 10 | | | | 4 | 15 | \$ 1,385.00 | \$ 942.09 | \$ 2,327.09 |
| 4.3 Provide all files, datasets, creative assets, research notes, and supporting materials. | 1 | 2 | | | | 7 | 17 | \$ 1,039.65 | \$ 962.27 | \$ 1,991.92 |
| Subtotal | 3 | 16 | 2 | 0 | 5 | 14 | 40 | \$ 3,198.50 | \$ 2,499.76 | \$ 5,698.26 |
| Other Direct Costs | | | | | | | | | | |
| Focus group incentives | | | | | | | | | | \$ 3,000.00 |
| Advertising | | | | | | | | | | \$ 20,000.00 |
| Giveaways and promotional items | | | | | | | | | | \$ 5,028.46 |
| Translation | | | | | | | | | | \$ 3,500.00 |
| Influencer incentives | | | | | | | | | | \$ 330.00 |
| Mileage | | | | | | | | | | \$ 750.00 |
| Subtotal | 38 | 224 | 62 | 25 | 47 | | | | | \$ 32,608.46 |
| TOTAL PROJECT COST | | | | | | | | | \$ 110,000.00 | |

Notes: Presented hourly rates include federally approved benefits rate of 36.3%. Actual billing rate at the time of service may vary depending on the final staffing plan at the time the project starts; the overall fee will not be exceeded. Federally approved NICRA rate of 107.53% is applied to actual rates only. Rates and non-key staff are subject to change at any time, without notice, and within the total budget shown.

Exhibit C

KEY PERSONNEL ASSIGNMENTS

| Title | Name | Direct Labor Rate |
|------------------------------|---------------------|--------------------------|
| Creative Director | Sarah Seward | \$105.62 |
| Sr Digital Marketing Manager | Rachel Peterson | \$80.53 |
| Art Director | Margaret Garan | \$77.40 |
| Program Manager | Tawn Kennedy | \$55.34 |
| Program Coordinator II | Romie Tejeda-Barron | \$44.20 |

(Direct Labor Rates do not include overhead costs)

Notes: Presented hourly rates include federally-approved rate of 36.3%. Actual billing rate at the time of service may vary depending on the final staffing plan at the time the project starts; the overall fee will not be exceeded. Federally approved NICRA rates of 107.53% is applied to actual rates only. Rates and non-key staff subject to change at any time, within the total budget shown.

Rates indicated shall be for the initial contract-year of the contract term. In any subsequent contract-years, annual rate escalation shall not exceed 3% per year. C/CAG reserves the right to negotiate with or to decline to enter into contracts with a Proposer's whose rates and/or Cost Proposal are unreasonable at C/CAG's sole discretion.

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