

**LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY  
(LAVTA)**

**REQUEST FOR PROPOSALS**

**FOR**

**On-Call Creative, Design and  
Media Strategy Services**

**RFP# 2018-05**

**LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY  
1362 Rutan Court, Suite 100  
Livermore, CA 94551**

**April 3, 2018**

**Key RFP Dates**

<b>Date of Issuance:</b>	<b>April 3, 2018</b>
<b>Written Questions/Requests Due:</b>	<b>April 20, 2018, 4:00 pm PDT</b>
<b>Responses to Questions/Requests:</b>	<b>April 25, 2018</b>
<b>Proposals Due:</b>	<b>May 11, 2018, 2:00 pm PDT</b>
<b>Contract Award (estimated):</b>	<b>June 4, 2018</b>
<b>Contract Execution (estimated):</b>	<b>June 15, 2018</b>

**Contact Information:**  
Tamara Edwards, Director of Finance  
(925) 455-7555  
procurements@lavta.org

April 3, 2018

**SUBJECT: NOTICE OF REQUEST FOR PROPOSALS**  
**On-Call Creative, Design and Media Strategy Services**

**RFP #2018-05**

The Livermore Amador Valley Transit Authority (LAVTA), operator of the Wheels and Rapid bus services, is accepting proposals from qualified firms for On-Call Creative, Design and Media Strategy Services as defined in the Request for Proposal #2018-05.

This project shall include the furnishing of all labor and services as set forth in the Scope of Work section of the Request for Proposal (RFP).

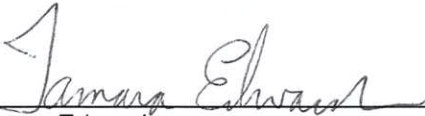
All Questions and Requests for Clarification must be submitted in writing by **April 20, 2018 at 4:00 p.m.** **Proposals must be received in the LAVTA Administrative Offices by 2:00 p.m. on May 11, 2018.** **No proposals will be accepted after this time and date.** Any proposal or amendment to proposal received after the closing time will be returned unopened to the sender. No Proposer may withdraw its proposal for a period of one hundred twenty (120) days after the opening of proposals. Each Proposer will be notified of award of contract, if award is made. LAVTA reserves the right to reject any and all proposals, or to waive any irregularities or informalities in any proposal or in the proposal procedure, or to postpone the proposal opening for good cause.

Proposals shall be submitted to the following:

**Livermore Amador Valley Transit Authority**  
**1362 Rutan Court, Suite 100**  
**Livermore, CA 94551**  
**Attention: Tamara Edwards, Director of Finance**

Full compliance with all Safety and Health Standards, Equal Employment Opportunity, and Americans with Disabilities Act laws and regulations will be required of the Proposer.

LAVTA intends for this procurement to be primarily conducted electronically via distribution on the procurement page of [www.wheelsbus.com](http://www.wheelsbus.com); however, upon request, copies of the RFP may be obtained by contacting LAVTA at (925) 455-7555.

  
\_\_\_\_\_  
Tamara Edwards  
Director of Finance  
Livermore Amador Valley Transit Authority

April 3, 2018

\_\_\_\_\_  
Date

**SECTION I**

**INSTRUCTIONS TO PROPOSERS**

## **1.0 INSTRUCTIONS TO PROPOSERS**

### **1.1 Examination of Proposal Documents**

The work to be performed under this contract consists of the furnishing of all labor, insurance, materials, and equipment necessary to perform the requirements specified in the Scope of Work. By submitting a proposal, Proposer represents that it has thoroughly examined and become familiar with the work required under this RFP and that it is capable of performing quality work to achieve the Livermore Amador Valley Transit Authority's ("Authority" or "LAVTA") objectives.

### **1.2 Addenda**

Any Authority changes to the requirements will be made by written addendum to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any resulting Agreement. The Authority will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their proposals.

### **1.3 Authority Contact**

All questions and/or contacts with LAVTA staff regarding this RFP are to be directed to the Procurement Officer:

Tamara Edwards  
Livermore Amador Valley Transit Authority  
1362 Rutan Court, Suite 100  
Livermore, CA 94551  
Phone: (925) 455-7555

### **1.4 Pre-Proposal Conference**

N/A

### **1.5 Questions and Requests for Clarification**

Should a Proposer have questions concerning or require clarifications of this RFP, the Proposer shall notify the Authority in writing. Should it be found that the point in question is not clearly and fully set forth, the Authority will issue a written addendum clarifying the matter, which will be posted on the agency's interactive website; [www.wheelsbus.com](http://www.wheelsbus.com).

#### **Submitting Request**

- (a) All questions and/or requests for clarification must be put in writing and must be received by the Authority no later than 4:00 p.m. on April 20, 2018.
- (b) Request for clarification, questions and comments must be clearly labeled, "Written Questions." The Authority is not responsible for failure to respond to a request that has not been labeled as such.

- (c) Any of the following methods of delivering written questions are acceptable as long as the questions are received no later than the date and time specified above:
- (1) U.S. Mail: Livermore Amador Valley Transit Authority, 1362 Rutan Court, Suite 100, Livermore, CA 94551.
  - (2) Personal Courier: Director of Finance, 1362 Rutan Court, Suite 100, Livermore, CA 94551.
  - (3) Facsimile: The Authority's fax number is (925) 443-1375.
  - (4) E-Mail: procurements@lavta.org.

### **1.6 Authority Responses**

Responses from the Authority will be posted on the Authority's website, [www.wheelsbus.com](http://www.wheelsbus.com) by April 25, 2018. LAVTA reserves the right to postpone this deadline for its own convenience.

### **1.7 Submission of Proposals**

- (a) Date and Time - Proposals must be received in the LAVTA Administrative Offices at or before 2:00 p.m. on May 11, 2018. Proposals received after the above-specified date and time will be returned to Proposers unopened.
- (b) Address - Proposals shall be submitted to the following:

**Livermore Amador Valley Transit Authority  
1362 Rutan Court, Suite 100  
Livermore, CA 94551  
Attn: Tamara Edwards, Director of Finance**

### **1.8 Identification of Proposals**

Proposer shall submit four (4) originals AND one (1) electronic version of its proposal on a CD or USB drive in a sealed box addressed as shown above, bearing the Proposer's name and address and clearly marked as follows:

**"On-Call Creative, Design and Media Strategy Services Proposal, RFP  
2018-05"**

### **1.9 Acceptance of Proposals**

- (a) The Authority reserves the right to accept or reject any and all proposals, or any item or part thereof, or to waive any informalities or irregularities in proposals or proposal procedures.

- (b) The Authority reserves the right to withdraw or cancel this RFP at any time without prior notice and the Authority makes no representations that any contract will be awarded to any Proposer responding to this RFP.
- (c) The Authority reserves the right to postpone proposal openings for its own convenience.
- (d) The Authority reserves the right to request additional information to clarify any proposal.

### **1.10 Pre-Contractual Expenses**

The Authority shall not, in any event, be liable for any pre-contractual expenses incurred by Proposer in the preparation of its proposal. Proposer shall not include any such expenses as part of its proposal.

Pre-contractual expenses are defined as expenses incurred by Proposer in:

1. Preparing its proposal in response to this RFP;
2. Submitting that proposal to the Authority;
3. Preparing and interviewing for the solicitation;
4. Giving a demonstration to the Authority;
5. Negotiating with the Authority on any matter related to this proposal; or
6. Any other expenses incurred by Proposer prior to date of award, if any of the Agreement.

### **1.11 Joint Offers**

Where two or more firms desire to submit a single proposal in response to this RFP, they should do so on a prime-subcontractor basis rather than as a joint venture. The Authority intends to contract with a single firm rather than with multiple firms doing business as a joint venture.

### **1.12 Protest Procedures**

Protests based upon the content of this Request for Proposals shall be filed in writing with Michael Tree, LAVTA Executive Director, within ten (10) calendar days after the Request for Proposals is first advertised. The protest must clearly specify in writing the grounds and evidence on which the protest is based. LAVTA shall issue a written decision on the protest prior to the opening of proposals. A protest may be renewed by refiling the protest within fifteen (15) calendar days after the mailing of the notice of the recommended award.

Any proposer may protest the recommended award on any ground not based upon the content of the Request for Proposals by filing a protest with LAVTA Executive Director, within fifteen (15) calendar days after the mailing of the notice of the recommended award. The protest must clearly specify in writing the grounds and evidence on which the protest is based. Protesters shall have an opportunity to appear and be heard before the board prior to final award of the contract.

Copies of the complete proposal protest procedure are available at the office of the Authority.

### **1.13 Contract Type**

Following the completion of all contractual requirements, the Contractor shall provide the services within the approved scope, schedule and price as set forth in the Agreement. (See Appendix B - Sample Agreement).

**SECTION II**

**SCOPE OF WORK**



## **SCOPE OF WORK**

### **ON-CALL CREATIVE, DESIGN AND MEDIA STRATEGY SERVICES**

#### **1. INTRODUCTION**

##### **1.1. Request for Proposals**

The Livermore Amador Valley Transit Authority (LAVTA) seeks the services of a qualified firm to provide strategic creative, design and media strategy services in planning, managing, and implementing marketing campaigns for a wide variety of programs and initiatives.

LAVTA will utilize the “Best Value” method of procurement, in conformance with applicable procurement guidelines.

##### **1.2. Scope of Work**

###### LAVTA Background

LAVTA operates Wheels and Rapid bus services, providing fixed route, school tripper and commuter express services, and Dial-A-Ride paratransit service to ADA eligible citizens in the cities of Dublin, Livermore, Pleasanton and adjacent unincorporated areas of Alameda County.

Funding for the system is provided by Federal, State and Alameda County sources. The seven-member LAVTA Board of Directors is responsible for the development of policy and oversight of LAVTA’s services and programs.

The Executive Director oversees the operation of the transit system in accordance with the policy direction prescribed by the Board of Directors and is responsible for the overall administration of the fixed route and paratransit system. At present, the Executive Director is supported by a staff of fourteen (14) employees. Consultants are retained as needed to provide specialized planning, marketing and technical assistance.

In August 2016, LAVTA implemented a major restructuring of its fixed route bus services. LAVTA had experienced five consecutive years of ridership declines and there were service related issues that needed to be addressed to attract more choice riders. The highlights of the service changes included improved access to BART and ACE rail stations, Las Positas College, and other key destinations in the Tri-Valley. Public response has been positive. Ridership for the first two months of 2018 was 17.1 percent higher than the same period in 2017.

The highest priority of the service redesign was improved access to the East Dublin/Pleasanton BART station. Ten of the new and modified routes connect directly to BART, including two routes that arrive every 15 minutes nearly all day on weekdays to connect with every BART train departure and arrival. This provides an attractive

alternative for BART riders looking to avoid the hassle of trying to find a parking spot in lots that are typically at capacity by 7:30 a.m.

Additionally, as part of the restructuring, new 15-minute frequency Rapid bus service was introduced to Las Positas College students, faculty, and staff who are now able to take advantage of premium bus service connecting directly to BART and ACE rail from the college. Concurrently, a new universal access pass program was introduced at Las Positas, enabling students to ride any Wheels or Rapid service simply by showing their student ID. Ridership to the college has more than doubled since August 2016 as a result of the improved service and pass program. In November 2017, a student ballot measure to provide continuing funding for the transit pass program passed with a 90 percent favorable vote.

In early 2017, LAVTA introduced an innovative partnership with ridesharing companies Uber, Lyft and DeSoto Cabs to offer city of Dublin residents enhanced transportation options and flexibility, in a format that is on demand and in real time. LAVTA's Go Dublin program was the first of its kind in the Bay Area and the first to partner with both Uber and Lyft. With the Go Dublin promotion, LAVTA pays for 50% of the fare, up to \$5 per trip with participating partners. To qualify for the discount, rideshare trips must both start and end within the Dublin city limits, which includes both the East Dublin and West Dublin BART stations.

In October 2016, the LAVTA Board unanimously voted to pursue a Shared Autonomous Vehicle (SAV) project in Dublin. To proceed with the project, state legislation was required. AB1444 was introduced in the California Legislature and was approved by both the House and Senate in late August 2017. The legislation permits LAVTA to "to conduct a shared autonomous vehicle (SAV) demonstration project for the testing of autonomous vehicles that do not have a driver seated in the driver's seat and are not equipped with a steering wheel, a brake pedal, or an accelerator..."

The project is viewed by LAVTA as another tool in improving first and last mile connections to the BART transit stations in our service area. LAVTA's proposed demonstration project is being carried out in collaboration with the city of Dublin, the Contra Costa Transit Authority, and GoMentum Station. When the project is implemented in early 2018, we believe that LAVTA will be the first agency in California to operate an SAV in transit operation on public roads.

LAVTA's primary transfer hub is located in downtown Livermore. The Transit Center operates as a transfer facility for seven bus routes, is adjacent to the ACE Rail Livermore Station, houses LAVTA's Customer Service staff and serves as the agency's primary sales outlet.

The Southern Pacific Railroad's historic train depot was built in downtown Livermore in 1892. Passenger service to the depot terminated in 1941. When Southern Pacific proposed demolition of the building in 1973, a group of area citizens objected and eventually the building was donated to the city of Livermore and the adjacent tracks were subsequently removed. After many years of deliberation, a plan to relocate and rehabilitate the building to serve as LAVTA's Transit Center operations building was set in motion.

A temporary transit center building was constructed and in the early morning hours on July 16, 2017, the depot building was moved on a flatbed truck the half mile to its new home. LAVTA's existing Transit Center building was then demolished and a new foundation for the historic building was constructed. The building has now been placed on its new foundation and interior renovation is expected to be completed in May 2018.

The passage of Assembly Bill 758 by the California Legislature on September 15, 2017 authorized the creation of the new Tri-Valley-San Joaquin Valley Regional Rail Authority. The legislation defines the roles of the new rail authority as "...planning, developing, and delivering cost-effective and responsive transit connectivity between the Bay Area Rapid Transit District's rapid transit system and the Altamont Corridor Express commuter rail service in the Tri-Valley".

The authority held its inaugural meeting on January 17, 2018. It is governed by a 15-member Board of Directors. LAVTA staff will provide all necessary executive and administrative support to enable the rail authority board to perform its duties and responsibilities. The legislation requires the authority to develop a feasibility report on the plans for the development and implementation of transit connectivity by July 1, 2019.

#### LAVTA Marketing Background

As is evident from the previous section, there are a number of exciting projects currently underway at LAVTA. The 14 person administrative staff includes two individuals to coordinate marketing activities. A copy of LAVTA's Marketing Plan for the current fiscal year is attached in Appendix C.

Ridership based marketing activities for the near term future will continue to be focused on: residents and commuters along the two Rapid routes; students at Las Positas College; and students at the four Livermore schools participating in the Affordable Student Transit Pass Pilot (ASTPP).

The two Rapid Routes, 10R and 30R, are high frequency routes that are scheduled every 15 minutes during the majority of the day to meet BART train arrivals and departures. These two routes currently comprise over 50% of average weekday LAVTA ridership, which is currently about 6,200. Because parking at BART is at capacity, the two Rapid routes offer choice riders an attractive alternative.

Las Positas College (LPC) is served by Rapid Route 30R. Currently ridership among students, faculty and staff is approximately 600 per weekday. Earlier this year, students approved the implementation of a student mobility fee to fund continued unlimited access to LAVTA services. Outreach to the campus in Fall 2018 will be a major focus of marketing efforts, as the college's payments to LAVTA are on a ridership-based formula.

The Affordable Student Transit Pass Pilot (ASTPP) is funded through the Alameda County Transportation Commission. The 2018-19 school year will be the third and final year of the pilot. Students at four Livermore schools are eligible to receive Clipper Cards with unlimited access to LAVTA services. Our goal is to increase the percentage of students who pick up the pass and to increase utilization rates among students.

Many of the other activities described in the FY 2018 Marketing Plan will also continue through the coming fiscal years. This includes the continued promotion of the Go Dublin program and the ongoing rollout of the new Wheels bus design and logo.

It is expected that LAVTA will budget between \$50,000 and \$100,000 per year in on-call creative, design and media strategy services during the term of the contract. Due to the complexity of several anticipated projects, LAVTA requires that the successful firm be available for on-site meetings at LAVTA facilities on occasion.

Creative, design and media strategy services will be provided on an as-needed basis, through a Task Order on-call process. The Task Order process will consist of LAVTA contacting the Consultant and requesting services related to an individual project. The Consultant will then prepare a detailed scope and budget proposal for each individual Task Order. The Task Orders will be agreed upon in advance between LAVTA and the Consultant.

#### Task Order Process

Task Orders will be initiated in accordance with the following procedure:

- LAVTA's Marketing Manager will issue a Task Order Proposal Request to Consultant, which will define the Scope of Work, deliverables and required schedule.
- Task Orders will be issued on a negotiated not-to-exceed price based on the individual project requirements.
- Consultant will submit its Task Order Proposal to LAVTA's Marketing Manager within five (5) days of receipt of the Task Order Proposal Request. The Task Order Proposal shall include the Consultant's understanding of the Scope of Work, deliverables and schedule and will include a cost proposal. Also included will be the names of the Consultant (and subconsultant) personnel proposed under the Task Order.
- LAVTA will review the Task Order Proposal for compliance with contractual requirements and will conduct a technical evaluation to ensure the Task Order Proposal is complete and is consistent with the Scope of Work, that personnel assigned are acceptable and that all costs proposed are appropriate.
- If required, LAVTA will conduct negotiations to address exceptions and costs identified in the Task Order Proposal. After negotiations, Consultant will submit a revised Task Order Proposal within five (5) days.
- LAVTA will issue the Task Order within five (5) days after receipt of an accepted Task Order Proposal.
- Services shall be performed under the direction of LAVTA's staff representative identified in the Task Order.
- The contractor shall produce artwork in high resolution electronic formats agreed to by LAVTA such as Adobe Illustrator for printing or to be placed on

LAVTA's website. All work produced under this contract will become and remain the property of LAVTA. The contractor is to furnish electronic files containing the artwork to LAVTA directly to LAVTA staff or to Contractor's FTP Site.

### General

The Consultant shall function with overall guidance from LAVTA staff, but will manage and control the day-to-day work directive activities and deliverables. The types of services anticipated to be provided include:

- Developing an integrated marketing and communications strategy focusing on promoting LAVTA as a viable transportation option.
- Planning, managing, facilitating, and implementing coordinated and consistent marketing and branding initiatives related to LAVTA programs, projects, and events.
- Project-based activities including strategic planning, copywriting, design, production, and marketing support.
- Design, content, or user experience support for campaigns run on or tied to LAVTA's website (wheelsbus.com) as well as other digital media.
- Developing concepts and designs for a variety of promotional and informational marketing materials, including but not limited to:
  - Brochures
  - Bus Timetables
  - System Maps
  - Reports
  - On Street Static Signage
  - Wayfinding signage
  - Other miscellaneous signage
  - Direct Mail and email marketing pieces
  - Digital and Print Ads
  - Website Updates
  - Flyers and posters
  - Displays and exhibit booths
  - Giveaways
  - On Board Bus Cards
  - Special Event materials
  - Miscellaneous graphic needs
- Making recommendations on most effective media to use, based on target audience, project objectives, media analyses and available resources. Also provide insight and recommendations on potential partnerships and cross promotional opportunities.
- Development of measures to assess the effectiveness of marketing and communications efforts as well as analysis and feedback on outreach activities.

Successful proposing firms will be able to:

1. Demonstrate a range of services available using direct in-house resources and/or proposed subcontractors.

2. Provide examples of work highlighting a variety of traditional and digital marketing campaigns, ranging from simple implementation projects to strategic client assignments.

3. Provide examples of fees and rate structures for simple projects versus broad/strategic assignments.

#### Contract Terms

The initial contract period is for two years from the effective date, with three (3) one-year options, to be exercised at LAVTA's sole discretion.

### **1.4 Payment and Invoicing Instructions**

The Authority shall make payment for each completed project within 30 days of receipt of proper statements or invoices for the work performed in full conformance with the solicitation requirements, and approved by LAVTA's Director of Finance or Executive Director. The Authority reserves the right to withhold payment to the Consultant if the Authority determines that the quantity or quality of the work performed is unacceptable. The Authority shall provide written notice to the Consultant within 10 business days of the Authority's decision not to pay and the reasons for non-payment.

Payments for all items shall include labor, taxes, storage, transportation, delivery, warranty, insurance, materials, profit, subcontractor costs, overhead and all other costs associated with provision of the services.

Each invoice shall detail the Task Order, the services performed, the personnel performing these services, the hours worked and the applicable hourly rate of compensation. Submitted documentation must correspond to the hourly rates of compensation specified in Consultant's proposal.

All invoices should be sent to:                   Accounts Payable  
  Livermore Amador Valley Transit Authority  
  1362 Rutan Court, Suite 100  
  Livermore, CA 94551

## **2.0 ADDITIONAL REQUIREMENTS**

### **2.1 Insurance**

The insurance requirements specified in this section shall apply to Consultant and any subcontractors, suppliers, temporary workers, independent contractors, leased employees, or any other persons, firms or corporations that Consultant authorizes to work under this Agreement (hereinafter collectively referred to as "Agents"). Consultant and all Agents are required to procure and maintain at their sole cost and expense the insurance coverages subject to all of the requirements set forth below. Such insurance shall remain in full force and effect throughout the term of this Agreement. To the extent that any Agent does not procure and maintain such insurance coverage, Consultant shall be responsible for said coverage and assume any and all costs and expenses that may be incurred in securing said coverage or in fulfilling Consultant's indemnity obligation as to itself or any of its Agents in the

absence of coverage. In the event Consultant or its Agents procure excess or umbrella coverage to maintain certain requirements outlined below, these policies shall also satisfy all specified endorsements and stipulations, including provisions that the Consultant's insurance be primary without any right of contribution from the Authority. Prior to beginning work under this contract, Consultant shall provide the Authority with satisfactory evidence of compliance with the insurance requirements of this section.

**A. Minimum Types and Scope of Insurance**

**1.) Workers' Compensation and Employers' Liability Insurance**

- a. Workers' Compensation with Statutory Limits, as required by Section 3700 et seq of the California Labor Code, or any subsequent amendments or successor acts thereto governing the liability of employers to their employees.
- b. Employers' Liability coverage with minimum limits of \$1 million.
- c. Such insurance shall include the following endorsement as further detailed in the Endorsements Section below:
  - Waiver of Subrogation.

**2.) Commercial General Liability Insurance**

Commercial General Liability insurance for bodily injury and property damage coverage with a combined single limit for bodily injury and property damage of at least \$1 million per occurrence or claim and a general aggregate limit of at least \$2 million. Such insurance shall cover all of Consultant's operations both at and away from the project site.

- a. This insurance shall include coverage for, but not be limited to:
  - Premises and operations.
  - Products and completed operations.
  - Contractual liability.
  - Personal injury.
  - Advertising injury.
  - Explosion, collapse, and underground coverage (xcu).
  - Broad form property damage.
- b. Such insurance shall include the following endorsements as further detailed in the Endorsements Section below:
  - Additional Insured.
  - Cross Liability or Severability of Interests Clause.
  - Primary and Non-Contributory wording.
  - Waiver of Subrogation.

Products and completed operations insurance shall be maintained for three (3) years following termination of this Agreement.

**3.) Business Automobile Liability Insurance**

Business Automobile Liability insurance providing bodily injury and property damage with a combined single limit of at least \$1 million per occurrence.

a. This insurance shall include coverage for, but not be limited to:

- All Owned vehicles.
- Non-owned vehicles.
- Hired or rental vehicles.

b. Such insurance shall include the following endorsements as further detailed in the Endorsements Section below:

- Additional Insured.
- Primary and Non-Contributory wording.
- Waiver of Subrogation.

**4.) Professional Liability Insurance**

The Consultant, at its own cost and expense, shall maintain professional liability insurance for the period covered by the Agreement, and two years following completion of the contract in an amount not less than \$1,000,000 covering errors and omissions in the services of the Consultant performs under the Agreement. The policy limits of this professional liability insurance policy shall apply separately to the Agreement.

**B. ENDORSEMENTS**

**1.) Additional Insured**

The referenced policies and any Excess or Umbrella policies shall include as Additional Insureds the Livermore Amador Valley Transit Authority and its directors, officers, employees, volunteers and agents while acting in such capacity, and their successors or assignees, as they now, or as they may hereafter be constituted, singly, jointly or severally.

**2.) Waiver of Subrogation**

The referenced policies and any Excess or Umbrella policies shall contain a waiver of subrogation in favor of the Livermore Amador Valley Transit Authority and its officers, directors, employees, volunteers and agents while acting in such capacity, and their successors and assignees, as they now, or as they may hereafter be constituted, singly, jointly or severally.

**3.) Primary Insurance**

The referenced policies and any Excess and Umbrella policies shall indicate that they are primary to any other insurance and the insurance company(ies) providing such policy(ies) shall be liable thereunder for the



full amount of any loss or claim, up to and including the total limit of liability, without right of contribution from any of the insurance effected or which may be effected by the Livermore Amador Valley Transit Authority.

**4.) Severability of Interests or Cross Liability**

The referenced policies and any Excess or Umbrella policies shall contain either a Cross Liability endorsement or Severability of Interests Clause and stipulate that inclusion of the Livermore Amador Valley Transit Authority as an Additional Insured shall not in any way affect Authority's rights either as respects any claim, demand, suit or judgment made, brought or recovered against the Consultant. Said policy shall protect Consultant and the Livermore Amador Valley Transit Authority in the same manner as though a separate policy had been issued to each, but nothing in said policy shall operate to increase the insurance company's liability as set forth in its policy beyond the amount or amounts shown or to which the insurance company would have been liable if only one interest had been named as an insured.

**C. EVIDENCE OF INSURANCE**

**All Coverages**

Prior to commencing work or entering onto the Property, Consultant shall provide the Authority's Director of Finance with a certificate evidencing coverage, and upon request, a certified duplicate original of the policy. The certificate shall also show that the Consultant's policy(ies) will not be cancelled or coverage altered without 30 days prior written notice to the Authority's Executive Director.

**D. GENERAL PROVISIONS**

**1.) Notice of Cancellation**

The policies shall provide that the Consultant's policies will not be cancelled or have limits reduced or coverage altered without 30 days prior written notice to the Authority's Executive Director.

**2.) Acceptable Insurers**

All policies will be issued by insurers acceptable to the Authority (generally with a Best's Rating of A- 10 or better).

**3.) Self-insurance**

Upon evidence of financial capacity satisfactory to the Authority and Consultant's agreement to waive subrogation against the Authority respecting any and all claims that may arise, Consultant's obligation hereunder may be satisfied in whole or in part by adequately funded self-insurance.

**4.) Failure to Maintain Insurance**

All insurance specified above shall remain in force until all work to be performed is satisfactorily completed, all of Consultant's personnel and

equipment have been removed from the Authority property, and the work has been formally accepted. The failure to procure or maintain required insurance and/or an adequately funded self-insurance program will constitute a material breach of this Agreement.

**5.) Claims Made Coverage**

If any insurance specified above shall be provided on a claim-made basis, then in addition to coverage requirements above, such policy shall provide that:

- a. Policy retroactive date coincides with or precedes the Consultant's start of work (including subsequent policies purchased as renewals or replacements).
- b. Consultant shall make every effort to maintain similar insurance for at least three (3) years following project completion, including the requirement of adding all named insureds.
- c. If insurance is terminated for any reason, Consultant agrees to purchase an extended reporting provision of at least three (3) years to report claims arising from work performed in connection with this Agreement.
- d. Policy allows for reporting of circumstances or incidents that might give rise to future claims.

**6.) Deductibles and Retentions**

Consultant shall be responsible for payment of any deductible or retention on Consultant's policies without right of contribution from the Authority.

In the event that the policy of the Consultant or any subcontractor contains a deductible or self-insured retention, and in the event that LAVTA seeks coverage under such policy as an additional insured, Consultant shall satisfy such deductible or self-insured retention to the extent of loss covered by such policy for a lawsuit arising from or connected with any alleged act or omission of Consultant, subcontractor, or any of their officers, directors, employees, agents, or suppliers, even if Consultant or subcontractor is not a named defendant in the lawsuit.

**2.2 Confidentiality**

The California Public Records Act (California Government Code Sections 6250 et seq.) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the content of any request for explanation, exception or substitution, response to these specifications, protest or any other written communication between Authority and the proposer shall be available to the public.

If the proposer believes any communication contains trade secrets or other proprietary information that the proposer believes would cause substantial injury to the proposer's

competitive position if disclosed, the proposer shall request that Authority withhold from disclosure the proprietary information by marking each page containing such proprietary information as confidential. The proposer may not designate its entire proposal or bid as confidential. Additionally, proposer may not designate its cost proposal or any required bid forms or certifications as confidential.

If proposer requests that Authority withhold from disclosure information identified as confidential, and Authority complies with the proposer's request, proposer shall assume all responsibility for any challenges resulting from the non-disclosure, indemnify and hold harmless Authority from and against all damages (including but not limited to attorneys' fees that may be awarded to the party requesting the proposer information), and pay any and all costs and expenses related to the withholding of proposer information.

Proposer shall not make a claim, sue or maintain any legal action against Authority or its directors, officers, employees or agents in connection with the withholding from disclosure of proposer information.

If proposer does not request that Authority withhold from disclosure information identified as confidential, Authority shall have no obligation to withhold the information from disclosure and may release the information sought without any liability to Authority.

### **2.3 Conflict of Interest**

Proposer represents and warrants that it presently has no interest and agrees that it will not acquire any interest which would present a conflict of interest under California Government Code §§ 1090 et seq. or §§ 87100 et seq. during the performance of services under the Agreement. Proposer shall promptly disclose any actual or potential conflict of interest to Authority as soon as proposer becomes aware of such conflict. Proposer further covenants that it will not knowingly employ any person having such an interest in the performance of the Agreement. Violation of this provision may result in the Agreement being deemed void and unenforceable.

No member, officer or employee of the Authority or of any of its member jurisdictions during his/her tenure of office, or for one year thereafter, shall have any interest, direct or indirect, in this contract or the proceeds therefrom.

**SECTION III**

**PROPOSAL CONTENT**

## **1.0 PROPOSAL CONTENT**

### **1.1 Format**

The intent of this RFP is to encourage responses that clearly communicate the proposer's understanding of the scope of work and the proposer's proposed approach to meet LAVTA's requirement for this work.

Proposals should be limited to specific discussion of the elements outlined in this RFP. Responders are encouraged to avoid submissions that are poorly organized or in which important information is obscured by unnecessary promotional material. Short, succinct, and clear submittals are less likely to be marked down due to uncertainty as to meaning or misinterpretation. The Evaluation Committee will assume the most unfavorable interpretation when information is unclear, ambiguous, or missing. Responders are encouraged to submit proposals that best address the evaluation criteria outlined in Section IV, Evaluation and Award, subsection 1.1.

The organization of the proposal should follow the general outline below. The Technical Proposal section (as described in Section 1.5 below) should not exceed 20 pages, excluding any appendices.

Respondent's proposal shall include the following items in the following sequence:

### **1.2 Cover Form**

The signed cover form, provided in Appendix A, contains the following:

- a) Date submitted and complete name and address of person who will receive correspondence and who is authorized to make decisions or represent the Proposer and contractually bind the firm. This person shall also sign the Price Proposal Form. Identification shall include legal name of company, corporate address, telephone and fax number and contact person during period of proposal evaluation.
- b) An understanding of the conditions under which the proposal is offered.
- c) Acknowledgement of receipt of all RFP addenda, if any. A statement to the effect that the proposal shall remain valid for a period of not less than one hundred twenty (120) days from the date of submittal.
- d) An understanding that LAVTA reserves the right to reject any or all Proposals or to waive any informality or technicality in any proposal in the interest of LAVTA.

- e) A statement that Proposer is prepared to sign the Sample Agreement without alterations or exceptions or whether it is requesting modifications to the Sample Agreement and/or any requirements of this RFP. Proposers shall not just attach their own sample agreements as exceptions to LAVTA's Sample Agreement, but instead must include interlineated exceptions to LAVTA's Sample Agreement.
- f) A statement confirming the commitment of adequate resources to meet LAVTA's quality and schedule expectations.
- g) Signature of a person authorized to bind Proposer to the terms of the proposal.

### **1.3 Evidence of Ability to Provide Insurance**

Provide evidence in the form of a certificate of insurance or letter from Proposer's broker/agent that verifies the firm is able to meet the minimum insurance requirements as detailed in Section II – Scope of Work, subsection 2.1 including, workers' compensation insurance, commercial general liability insurance, automobile liability insurance and professional liability insurance.

### **1.4 Proposer's Qualifications, Experience and References**

The following information shall be included:

- a) A brief description of the Proposer's qualifications for performing creative and graphic design services, including the organization's size and years in business.
- b) Experience – This section should contain a concise description of the proposer's background and experience in creative, design and media strategy services for public and nonprofit agencies, similar to those outlined in the Scope of Work, listing at least three agencies for which similar work has been performed within the last three years (not including LAVTA). The information submitted should include:
  - Name, address, and telephone number of the responsible official of the organization
  - Reference agency website links
  - Amount of the contract
  - Dates services encompass
  - Services provided
  - The current status of the contract
- c) Resumes of Key Personnel – this section should contain resumes for key personnel identified as being assigned to the LAVTA contract. The resumes should feature all job experience at least the past three years, and membership and certifications pertinent to providing the services as defined in the Scope of Work.
- d) Financial stability and history of the Proposer - Provide a statement of your firm's financial strength, stability, capacity, and resources. Company official

reports and other similar materials (balance sheet and income statements, with 3-year summary history) should be provided. Provide information about the history of the firm, demonstrating viability of the firm.

- Identify any past (within last 3 years) or pending litigation against the Proposer alleging failure to perform in accordance with contractual obligations, and describe present status. If there is no such litigation, this must be explicitly stated.
- List any projects, which have resulted in time extensions and/or the assessment of liquidated damages against any member of the project team during the last five (5) years.
- Disclosure of potential conflicts of interest with other clients of the firm.

### **1.5 Technical Proposal**

On-Call Creative, Design and Media Strategy Services - The following shall be included as a description of the proposed services to be provided by the Proposer under this contract:

- a) A complete staffing plan that addresses the Scope of Work as defined in this RFP.
- b) Conformance to the terms of the requirements of the RFP – The Proposer should describe if they can meet all the requirements of the RFP. Any deviation with the RFP requirements should be clearly identified and described. Failure to specify any exceptions or objection to the requirements, and terms and conditions of this RFP will constitute acceptance of LAVTA's requirements.
- c) Identification of any parts of the proposal the proposer considers proprietary or confidential and a written justification for the claim.

### **1.6 Price Proposal**

The Proposer shall use the Price Proposal Form provided in Appendix A. The price proposal shall include everything necessary for the completion of and fulfillment of the contract including, but not limited to, materials, equipment, and all management, superintendence, labor and services and all applicable federal, state, and local taxes.

### **1.7 Supporting Documentation (No Page Limit)**

Proposals may include other material that may assist in evaluating the Proposal. Supporting documentation should be relevant and brief.

### **1.8 Completed Required Forms (Provided in Appendix A)**

- Proposal Cover Form
- Price Proposal

On-Call Creative, Design and Media Strategy Services – #2018-05

- Certification Regarding Worker Compensation
- Fair Employment Practice Certification
- Certification Concerning Control of Employees

Respondent is expected to examine this RFP carefully, understand the terms and conditions for providing the products herein and respond completely. **FAILURE TO COMPLETE AND PROVIDE ANY OF THE ABOVE ITEMS MAY RESULT IN THE RESPONDENT'S PROPOSAL BEING DEEMED NON-RESPONSIVE AND THEREFORE DISQUALIFIED FROM CONSIDERATION.**



**SECTION IV**

**EVALUATION AND AWARD**

## 1.0 EVALUATION AND AWARD

### 1.1 Evaluation Criteria

The Authority will evaluate the Proposals received based on the following criteria:

Criteria	Scoring
Complete and thorough conformance with the terms and requirements of this RFP (In your submittal, state if you have any exceptions to the requirements.)	Pass/Fail
Agency background and range of services available from the agency	30
Qualifications of Proposed Staff	30
Experience with Projects of Similar Scope	25
Price	15
Total Points	100 points

### 1.2 Evaluation Procedure

To be considered for evaluation, all proposals must be responsive to this Request for Proposals with respect to required submissions and must be compliant with all provisions as documented. LAVTA may reject as nonresponsive any proposal not meeting the requirements of this RFP.

An Evaluation Committee shall be comprised of LAVTA staff, and may include outside personnel. The Committee members will evaluate the written proposals using the criteria identified in Section 1.1 above.

Firms submitting a proposal to this RFP may be required to give a demonstration and presentation of their proposal to LAVTA. This presentation may provide an opportunity for the firms to clarify or elaborate on the proposal but will in no way change the original submission.

Engagement staff shall be present at the oral presentation. LAVTA's request for an oral presentation shall not constitute acceptance of a proposal.

After evaluating proposals based upon the criteria above, the Evaluation Committee will develop a list of top-ranked proposals within a competitive range, based upon the totals of each Committee members' score for each proposal. At this time, proposers may be asked to submit a Revised Proposal. In a request for Revised Proposals, firms may be asked to provide additional information, confirm or clarify issues and submit a final price offer. A deadline for submission will be stipulated. LAVTA may, at its sole discretion, choose not to require a Revised Proposal, so proposers should submit their best proposal in the initial response.

### **1.3 Award**

The Authority may negotiate contract terms with the selected Proposer prior to award, and expressly reserves the right to negotiate with several Proposers simultaneously and, thereafter, to award a contract to the Proposer offering the most favorable terms to the Authority. LAVTA reserves the right to determine the best value to the Authority through this competitive process using highest weighted score analysis technique.

Negotiations may or may not be conducted with Proposers; therefore, the proposal submitted should contain Proposer's most favorable terms and conditions, since the selection and award may be made without discussion with any Proposer.

### **1.4 Notification of Award**

Proposers who submit a proposal in response to this RFP shall be notified by mail regarding LAVTA's intent to award the contract.

**APPENDIX A**

**REQUIRED PROPOSAL FORMS**

**PROPOSAL COVER FORM**  
**For**  
**On-Call Creative, Design and Media Strategy Services**  
**RFP # 2018-05**

Livermore Amador Valley Transit Authority (LAVTA)  
Livermore, CA

DATE SUBMITTED:

NAME OF INDIVIDUAL SUBMITTING PROPOSAL:

CONTACT PERSON:

NAME UNDER WHICH BUSINESS IS CONDUCTED:

STREET ADDRESS:

MAILING ADDRESS, IF DIFFERENT:

TELEPHONE:

FAX:

BUSINESS LICENSE NUMBER:

CONDITIONS:

1. The undersigned understands that he/she will be bound by the Proposal as expressed by these forms if an award is made by LAVTA. The Contract will be in accordance with this Proposal.
2. The Request for Proposals, Required Forms, and Addenda, if any, are made a part of this Proposal.
3. The undersigned understands that any clarification made to the Proposal Form or any new and different conditions or information submitted in or with the Proposal Form, other than that requested, may render the Proposer unresponsive.

4. The undersigned acknowledges the receipt of the following Addenda:

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5. The undersigned understands that all proposals shall remain in effect for one hundred twenty (120) days from the date of the submittal.
6. The undersigned understands that LAVTA reserves the right to reject any or all Proposals or to waive any informality or technicality in any proposal in the interest of LAVTA.
7. The undersigned certifies that the Proposal includes all costs for labor, materials, taxes, insurance, overhead, profits, and all other costs necessary to perform the work in accordance with the Contract Documents.
8. The undersigned will submit four (4) sets of their proposal package and one electronic copy of the proposal on a CD or USB drive. The four sets of the proposal package and one electronic copy shall be placed in a sealed box (marked "On-Call Creative, Design and Media Strategy Services Proposal, RFP 2018-05"). The four sets of a proposer's proposal must be submitted as follows:

One original proposal with required signatures in ink by an officer of the proposer with the authority to bind the proposer to the terms of the RFP submitted in a separate securely sealed envelope marked as follows:

ORIGINAL: On-Call Creative, Design and Media Strategy Services

Proposers are warned against making erasures or alterations of any kind without initialing each and every change.

Three sets of copies of the proposal submitted in a separate securely sealed envelope marked as follows:

COPIES: On-Call Creative, Design and Media Strategy Services

One electronic copy of the PROPOSAL on CD or USB drive.

The sealed package shall, prior to 2:00 pm Pacific Time on May 11, 2018, shall be delivered to:

Tamara Edwards  
Director of Finance  
Livermore Amador Valley Transit Authority  
1362 Rutan Court, Suite 100  
Livermore, CA 94551

9. The undersigned is prepared to sign the Sample Agreement without alterations or exceptions or if it is requesting modifications to the Sample Agreement and/or any requirements of this RFP, shall include such requested modifications in its proposal.

10. The undersigned confirms the commitment of adequate resources to meet LAVTA's quality and schedule expectations.

SIGNED:

The undersigned certify that we sign this Proposal Form with full and proper authorization to do so.

\_\_\_\_\_  
Signature, Printed Name, and Title

\_\_\_\_\_  
Signature, Printed Name, and Title

**IF CORPORATION:**

This Corporation is incorporated under the laws of the State of:

\_\_\_\_\_

\*If Consultant is a corporation, two corporate officers must sign on behalf of the corporation as follows: (1) Chairman of the Board, President, or Vice President; and (2) Secretary, Assistant Secretary, Chief Financial Officer, or Assistant Financial Officer. In the alternative, this Contract may be executed by a single officer or a person other than an officer provided that evidence satisfactory to LAVTA is provided, demonstrating that such individual is authorized to bind the corporation (e.g., a copy of a certified resolution from the corporation's board or a copy of the corporation's by laws).

## Price Proposal

In Staffing Plan required in Technical Proposal, please identify the individual proposed for each position listed below. Position names below are illustrative. Please revise using job titles at your agency. Add/delete positions as appropriate.

HOURLY RATES BY POSITION	Years 1 & 2	Option 1 (Year 3)	Option 2 (Year 4)	Option 3 (Year 5)
<b>Agency Principal</b>				
<b>Creative Director</b>				
<b>Art Director</b>				
<b>Web Developer</b>				
<b>Social Media Specialist</b>				
<b>Media Strategist/Buyer</b>				
<b>Account Executive</b>				
<b>Copywriter</b>				
<b>Graphic Designer</b>				
<b>Production/Administrative Assistant</b>				

SIGNED: The undersigned certify that we sign this Price Proposal Form with full and proper authorization to do so.

\_\_\_\_\_

Company Name

\_\_\_\_\_

Signature, Printed Name, and Title

\_\_\_\_\_

Signature, Printed Name, and Title

\*If Consultant is a corporation, two corporate officers must sign on behalf of the corporation as follows: (1) Chairman of the Board, President, or Vice President; and (2) Secretary, Assistant Secretary, Chief Financial Officer, or Assistant Financial Officer. In the alternative, this Contract may be executed by a single officer or a person other than an officer provided that evidence satisfactory to LAVTA is provided, demonstrating that such individual is authorized to bind the corporation (e.g., a copy of a certified resolution from the corporation's board or a copy of the corporation's by laws).



**CERTIFICATION REGARDING WORKER COMPENSATION**

Contract with the LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY, 1362 Rutan Court, Livermore, California 94551, for Financial Auditing Services.

RFP # 2018-05

Labor Code Section 3700:

"Every employer, except the State, and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

(a) By being insured against liability to pay compensation by one or more insurers, duly authorized to write compensation insurance in this State.

(b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to employees."

I am aware of the provisions of Section 3700 of the Labor Code, which require every employer to be insured against liability for worker's compensation or to undertake self-insurance. In accordance with the provisions of that code, I will comply with such provisions before commencing the performance of the work of this contract.

Dated: \_\_\_\_\_, 201\_\_ (Proposer)

By \_\_\_\_\_  
\_\_\_\_\_  
(Official Title)

(SEAL)

(Labor Code Section 1861, provides that the above certificate must be signed and filed by the Proposer with the Authority prior to performing any work under this contract.)

## FAIR EMPLOYMENT PRACTICES CERTIFICATION

In connection with the performance of work under this contract, the Proposer agrees as follows:

1. The Proposer will not willfully discriminate against any employee or applicant for employment because of race, color, religious creed, ancestry, national origin, age, sex, physical disability, mental disabilities, marital status, or medical condition as defined in Government Code §12926. The Proposer will take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, religious creed, ancestry, national origin, age, sex, physical disability, mental disability, marital status, or medical condition as defined in Government Code §12926. Such action shall include, but not be limited to, the following: employment; upgrading; demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeship. The Proposer agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this Fair Employment Practices section.
2. The Proposer will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice, advising the said labor union or workers' representative of the Proposer's commitments under this section; and the Proposer shall post copies of the notice in conspicuous places available to employees and applicants for employment.
3. The Proposer will permit access to its records of employment, employment advertisements, application forms, and other pertinent data and records by the Fair Employment Practices Commission, LAVTA, or any other appropriate agency of the State of California designated by LAVTA for the purposes of investigation to ascertain compliance with the Fair Employment Practices section of this contract.
4. A finding of willful violation of the Fair Employment Practices section of this contract or of the Fair Employment Practices Act shall be regarded by LAVTA as a basis for determining the Proposer to be not a "responsible Proposer" as to future contracts for which such Proposer may submit Proposals, for revoking the Proposer's pre-qualification rating, if any, and for refusing to establish, re-establish, or renew a pre-qualification rating for the Proposer.  
  
LAVTA shall deem a finding of willful violation of the Fair Employment Practices Act to have occurred upon receipt of written notice from the Fair Employment Practices Commission that it has investigated and determined that the Proposer has violated the Fair Employment Practices Act and has issued an order under Government Code §12970 or obtained a court order under Government Code §12973.  
  
Upon receipt of such written notice from the Fair Employment Practices Commission, LAVTA shall notify the Proposer that, unless it demonstrates to the satisfaction of LAVTA within a stated period that the violation has been corrected, the Proposer's pre-qualification rating will be revoked.
5. The Proposer agrees that should LAVTA determine that the Proposer has not complied with the Fair Employment Practices section of this contract then, pursuant to Labor Code Sections 1735 and 1775, the Proposer shall, as a penalty to LAVTA, forfeit, for each calendar day, or portion thereof, for each person who was denied employment as a result of such noncompliance, the penalties provided in the labor code for violation of prevailing wage rates. Such monies may be recovered from the Proposer. LAVTA may deduct any such damages from any monies due the Proposer.
6. Nothing contained in this Fair Employment Practices section shall be construed in any manner of fashion so as to prevent LAVTA from pursuing any other remedies that may be available at law.
7. Prior to award of the contract, the Proposer shall certify to LAVTA that it has or will meet the following standards for affirmative compliance, which shall be evaluated in each case by LAVTA:
  - a. The Proposer shall provide evidence, as required by LAVTA, that it has notified all supervisors, foremen and other personnel officers, in writing, of the content of the anti-discrimination clause and their responsibilities under it.
  - b. The Proposer shall provide evidence, as required by LAVTA, that it has notified all sources of employee's referral (including unions, employment agencies, advertisements, Employment Development Department) of the content of the anti-discrimination clause.

c. The Proposer shall file a basic compliance report as required by LAVTA. Willfully false statements made in such reports shall be punishable as provided by law. The compliance report shall also spell out the sources of the work force and who has the responsibility for determining whom to hire or whether or not to hire.

d. Personally, or through its representatives, the Proposer shall, through negotiations with the unions with whom it has agreements, attempt to develop an agreement which will:

- (1) Spell out responsibilities for nondiscrimination in hiring, referral, upgrading, and training.
- (2) Otherwise implement an affirmative anti-discrimination program in terms of the unions' specific areas of skill and geography to the end that qualified minority workers will be available and given an equal opportunity for employment.

e. The Proposer shall notify LAVTA of opposition to the anti-discrimination clause by individuals, firms, or organizations during the period of its pre-qualification.

8. The Proposer will include the provisions of the foregoing Paragraphs 1 through 7 in every first-tier subcontract so that such provisions will be binding upon each sub consultant.

9. Statements and Payrolls. The Proposer shall maintain its records in conformance with the requirements included in the Information to Proposers and the following Special Conditions:

a. The submission by the Proposer of payrolls or copies thereof, is not required. However, each Proposer and sub-contractor shall preserve their weekly payroll records for a period of three (3) years from the date of completion of this contract.

b. The payroll records shall contain the name, address and social security number of each employee, his/her correct classification, rate of pay, daily and weekly number of hours worked, itemized deductions made, and actual wages paid.

c. The Proposer shall make its payroll records available at the project site for inspection by LAVTA and shall permit LAVTA to interview employees during working hours on the job.

The following certification is to be executed by every Proposer and enclosed and forwarded in a sealed envelope containing the Proposal. The person signing the certification shall state his/her address and official capacity.

### Fair Employment Practice Certification

The undersigned, in submitting a Proposal for performing work as specified in the Scope of Work hereby certifies that the Proposer will meet the above standards of affirmative compliance with the Fair Employment Practices Act.

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PROPOSER

---

SIGNATURE

---

PRINTED NAME OF SIGNER

---

TITLE

---

MAILING ADDRESS

---

CITY

STATE

ZIP CODE

---

TELEPHONE NUMBER

---

DATE

**LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY  
A CERTIFICATION CONCERNING CONTROL OF EMPLOYEES  
OF CONSULTANT**

The Consultant, by entering into this Agreement with LAVTA to perform or provide work, services or materials to LAVTA, does hereby certify and assure that in performing the services under this Agreement, the Consultant shall act as an independent contractor and shall have full control of the work and Consultant's employees. Consultant and its employees, under no circumstances whatsoever, shall imply or be considered as an agent(s) or employee(s) of LAVTA. Consultant employees, under no circumstances, shall be entitled to part of any pension plan, insurance, bonus, or any similar benefits which LAVTA provides its own employees.

Any infraction of this Certification shall be cause for termination of this agreement.

Authorized Representative of Proposer

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**APPENDIX B**

**PROPOSED LAVTA AGREEMENT**

SAMPLE

THIS AGREEMENT, ("Agreement") made and entered into this \_\_\_ day of \_\_\_\_\_, 2018 by and between the **Livermore Amador Valley Transit Authority** (Authority), and \_\_\_\_\_ (Consultant).

**WITNESSETH**

WHEREAS, Authority desires to obtain a firm to provide On-Call Creative, Design and Media Strategy Services and has issued a Request for Proposals dated \_\_\_\_\_, 2018(which is attached hereto and incorporated as Attachment 1); and

WHEREAS, Consultant is qualified and willing to provide said Services and has submitted a proposal dated \_\_\_\_\_, 2018 (which is attached hereto and incorporated as Attachment 2).

**NOW, THEREFORE**, Authority and Consultant agree as follows:

**1. RENDITION OF SERVICES**

The Consultant agrees to perform services to Authority in accordance with the terms and conditions of this Agreement.

**2. SCOPE OF SERVICES**

Subject to the terms and conditions set forth in this Agreement, Consultant shall provide the services described in Appendix A, as supplemented by Appendix B, except when inconsistent with Appendix A.

**3. SCHEDULE AND TIME OF COMPLETION**

The Consultant shall complete all work under this Agreement pursuant to the schedule provided in Appendix A.

**4. COMPENSATION AND METHOD OF PAYMENT**

The Contractor agrees to perform all of the services included in Section 2 at the rates quoted in Appendix A's Price Proposal Form for the not-to-exceed price of \_\_\_\_\_ (\$XX,XXX). The compensation amounts shall include all labor, materials, taxes, profit, overhead, insurance, subcontractor costs and all other costs and expenses incurred by the Contractor in the performance of the services under this Agreement.

Additional services requested by the Authority shall be compensated in accordance with the fully burdened labor rates quoted in Appendix A's Price Proposal Form.

Contractor services shall be billed in accordance with Appendix A. The Authority will make payment in accordance with the payment and invoicing instructions provided in Section III Scope of Work. Invoices shall be made in writing and delivered or mailed to Authority as follows:

Accounts Payable  
Livermore/Amador Valley Transit Authority  
1362 Rutan Court  
Suite 100  
Livermore, CA 94551

Consultant represents that Consultant's taxpayer identification number (TIN) is as evidenced by a completed Federal Form W-9.

**5. CONSULTANT'S KEY PERSONNEL**

It is understood and agreed by the parties that at all times during the term of this Agreement that \_\_\_\_\_ shall serve as the primary staff person of Consultant to undertake, render, and oversee all of the services under this Agreement. Upon written notice by the Consultant and approval by the Authority, which will not be unreasonably withheld, the Consultant may substitute this person with another person, who may possess similar qualifications and experience for this position.

**6 CHANGES**

Authority may, at any time, by written order, make changes within the Scope of Work and services described in this Agreement. If such changes cause an increase in the budgeted cost of or the time required for performance of the agreed upon work, an equitable adjustment as mutually agreed shall be made in the limit on compensation as set forth in Section 3. In the event that the Consultant encounters any unanticipated conditions or contingencies that may affect the scope of work or services, schedule or the amount of compensation specified herein, Consultant shall so advise Authority immediately upon notice of such condition or contingency. The written notice shall explain the circumstances giving rise to the unforeseen condition or contingency and shall set forth the proposed adjustment in schedule or compensation. This notice shall be given to the Authority prior to the time that Consultant performs work or services related to any proposed adjustment. The pertinent changes shall be expressed in a written supplement to this Agreement prior to implementation of such changes.

**7. CONSULTANT'S STATUS**

Consultant is an independent consultant and not an employee or agent of Authority and has no Authority to contract or enter into any other agreement in the name of Authority. Consultant has, and hereby retains, full control over the employment, direction, compensation and discharge of all persons employed by Consultant who are assisting in the performance of services under this Agreement. Consultant shall be fully responsible for all matters relating to the payment of its employees, including compliance with social security, withholding tax and all other laws and regulations governing such matters. Consultant shall be responsible for its own acts and those of its agents and employees during the term of this Agreement.



**8. INDEMNIFICATION**

To the maximum extent permitted by law, Consultant shall defend, indemnify and hold harmless Authority, its directors, officers, agents and employees from all claims, demands, suits, loss, damages, injury and liability, direct or indirect (including any and all costs and expenses in connection therewith) (collectively "Liability"), that arise out of, pertain to, or relate to the negligence, recklessness, or intentional misconduct of Consultant, its officers, agents, employees and subcontractors/subconsultants or any of them. This obligation shall not apply to Liability that arising from the sole negligence or willful misconduct of Authority or to defects in design furnished by Authority or that arise from the active negligence of Authority. Except as provided above, Consultant will indemnify and defend Authority notwithstanding any alleged or actual passive negligence of Authority which may have contributed to the Liability. In the event any aspect of the foregoing provision is found to be void or unenforceable, a court shall interpret this provision to give the maximum protection available to the Authority under applicable law. This provision will survive termination or expiration of the Agreement.

**9. MAINTENANCE, AUDIT AND INSPECTION OF RECORDS**

All Consultant and subcontractors/subconsultants costs incurred in the performance of this Contract will be subject to audit. Consultant and its subcontractors/subconsultants shall permit LAVTA, or its authorized representatives to inspect, examine, make excerpts from, transcribe, and copy Consultant's books, work, documents, papers, materials, payrolls records, accounts, and any and all data relevant to the Agreement at any reasonable time, and to audit and verify statements, invoices or bills submitted by the Consultant pursuant to this Agreement. The Consultant shall also provide such assistance as may be required in the course of such audit. Consultant shall retain these records and make them available for inspection hereunder for a period of four (4) years after expiration or termination of the Agreement.

If, as a result of the audit, it is determined by LAVTA's auditor or staff that reimbursement of any costs including profit or fee under this Contract was in excess of that represented and relied upon during price negotiations or represented as a basis for payment, the Consultant agrees to reimburse LAVTA for those costs within sixty (60) days of written notification by LAVTA.

**10. DATA TO BE FURNISHED BY AUTHORITY--CONFIDENTIALITY**

All data, reports, surveys, studies, drawings and any other documents and materials made available to Consultant by Authority for use by Consultant in the performance of its services under this Agreement shall be made available for information only and shall be returned to Authority at the completion or termination of this Agreement.

Any LAVTA materials to which the Consultant has access or materials prepared by the Consultant during the course of this Agreement ("confidential information") shall be held in confidence by the Consultant, who shall exercise all

reasonable precautions to prevent the disclosure of confidential information to anyone except the officers, employees and agents of the Consultant as necessary to accomplish the rendition of services required by this Agreement.

Consultant shall not release any reports, information or promotional materials prepared in connection with this Agreement, whether deemed confidential or not, to any third party without the approval of the LAVTA.

## **11. OWNERSHIP OF WORK**

- A. All communications, records, or other materials or documents originated, prepared, and in the process of being prepared, for the services to be performed by Consultant under this Agreement, including, but not limited to: designs, branding materials, strategies, creative briefs, advertisements, copy layouts, scripts, artwork, logos, slogans, images, illustration, reports, findings, analyses, submittals, conclusions, opinions, drawings, specifications, standards, process sheets, photographs, videos, manuals, technical reports and recommendations with respect to the subject matter of this Agreement and raw and underlying data of such materials, regardless of format or media, including software, reports and other documentation (all of the foregoing, collectively, the "Work Product"), shall be delivered to and become the property of LAVTA. LAVTA shall be entitled to access and to copy the Work Product during the progress of the Work. Any Work Product remaining in the hands of Consultant or in the hands of any subcontractor/subconsultant upon completion or termination of the work shall be immediately delivered to LAVTA and not later than within two (2) weeks of completion or termination of the Work. If any materials are lost, damaged or destroyed before final delivery to LAVTA, Consultant shall replace them at its own expense, and Consultant assumes all risk of loss, damage or destruction of or to such materials.
- B. Any specific knowledge of LAVTA proprietary information gained as a result of this Agreement shall be used exclusively to accomplish the Scope of Work outlined above and for no other purpose.
- C. Any and all rights of copyright to Work Product prepared under this Agreement are hereby assigned to LAVTA. Consultant agrees to execute any additional documents that may be necessary to evidence such assignment. Consultant agrees not to assert any rights at common law or equity and not to establish any claim to statutory copyright in such Work Product. Except for its own internal use, Consultant shall not publish or reproduce such Work Product in whole or in part, or in any manner or form, nor authorize others to do so, without the written consent of LAVTA
- D. Notwithstanding anything herein to the contrary, LAVTA acknowledges that as part of Consultant's provision of work hereunder, Consultant may utilize proprietary works of authorship including, without limitation, software, methodologies, tools, specifications, drawings, sketches, models, samples, records and documentation, as well as copyrights, trademarks, service marks, ideas, concepts, know-how, techniques, knowledge or data, that have been originated or developed by Consultant

or by third parties under Agreement to, or which have been purchased by, Consultant (all of the foregoing, collectively, "Consultant's Information"). LAVTA agrees that Consultant's Information is and shall remain the sole property of Consultant or such third party. Consultant agrees that LAVTA shall be entitled to use Consultant's Information in connection with this Agreement, and shall grant to LAVTA a perpetual, royalty-free, irrevocable, worldwide, non-exclusive license to use all Consultant's Information and to create and use derivative works of Consultant's Information in connection with this Agreement.

E. Consultant represents and warrants that it has or will have all appropriate licenses, agreements and/or ownership pertaining to all intellectual property, including but not limited to patents and copyrights, used in connection with the performance of its obligations under this Agreement. Consultant further represents and warrants that it will have all necessary rights to patentable and copyrightable materials, equipment, devices or processes not furnished by LAVTA used on or incorporated in the work and assumes all risks arising from the use of such patentable and copyrightable materials, equipment, devices, or processes.

F. Consultant shall indemnify, defend and hold harmless LAVTA, its directors, officers, agents and employees to the maximum extent permitted by law from and against any and all claims, liabilities, losses, damages or expenses (including attorneys' fees and related costs, whether or not litigation has commenced), whether direct or indirect, arising out of, relating to, or in connection with the ownership, possession or use of any materials, equipment, devices, or processes that are protected by intellectual property rights, including patent, copyright and trade secret. In case such materials, equipment, devices or processes are held to constitute an infringement and their use enjoined, Consultant, at Consultant's sole cost and expense, shall: (a) secure for LAVTA the right to continue using the materials, equipment, devices or processes by suspension of the injunction or by procuring a royalty-free license or licenses, or (b) replace such materials, equipment, devices, or processes with non-infringing materials, equipment, devices or processes that perform the same functions as the infringing item, or (c) modify them so that they become non-infringing or remove the enjoined materials, equipment, devices or processes and refund the sums paid therefore, without prejudice to any other rights of LAVTA. If the amount of time necessary to proceed with one of these options is deemed excessive by LAVTA, LAVTA may direct Consultant to select another option or risk default.

## 12. **TERMINATION**

LAVTA shall have the right to suspend or terminate this Agreement at any time by giving written notice to the Consultant. Upon receipt of such notice, the Consultant shall not commit itself to any further expenditure of time or resources.

If the Agreement is suspended or terminated for any reason other than a default by Consultant, LAVTA shall pay to Consultant all sums actually due and owing

from LAVTA for all services performed and all expenses incurred up to the day written notice of effective date of suspension or termination is given, plus any costs LAVTA determines are reasonably and necessarily incurred by Consultant to effect such suspension or termination. If the Agreement is terminated for default, LAVTA shall remit final payment to Consultant in an amount to cover only those services performed and expenses incurred in full accordance with the terms and conditions of this Agreement up to the effective date of termination.

**13. DATA PROTECTION**

- (a) The Consultant warrants that, to the extent it processes any Personally Identifiable Information on behalf of LAVTA:
- (b) it shall act only on instructions from LAVTA; and
- (c) it has in place appropriate technical and organizational security measures against unauthorized or unlawful access, processing, theft, or security breach of Personally Identifiable Information and against accidental loss or destruction of, or damage to, Personally Identifiable Information.

In this clause 13, **Personally Identifiable Information** has the meaning given under California law.

**14. SUBCONTRACTS**

Consultant shall not subcontract all or any portion of its services under this Agreement without the prior written approval of the Authority, and any attempt thereat shall be void and unenforceable. In the event that Consultant enters into one or more subcontracts pursuant to this article, it is understood and agreed that the participating subcontractors shall be solely and directly responsible to Consultant, and Authority shall have no obligation to them.

**15. ASSIGNMENT OF AGREEMENT**

Consultant shall not assign this Agreement or any part thereof without prior express written consent of Authority, and any attempt thereat shall be void and unenforceable.

**16. NOTICES**

Except for invoices submitted by Consultant pursuant to Article 4, all notices or other communications to either party by the other shall be deemed given when made in writing and delivered or mailed to such party at their respective addresses as follows:

To Authority: Executive Director  
Livermore/Amador Valley Transit Authority

1362 Rutan Court  
Suite 100  
Livermore, CA 94551

To Consultant :

**17. NON DISCRIMINATION**

Consultant (and any subcontractors) shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. Consultant (and any subcontractors) shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Consultant (and any subcontractors) to carry out these requirements is a material breach of this Agreement, which may result in the termination of this Agreement or such other remedy as Authority deems appropriate.

**18. EQUAL EMPLOYMENT OPPORTUNITY**

In connection with the performance of this Agreement, Consultant shall not discriminate against any employee or applicant for employment, because of race, religion, color, sex, disability or national origin. Consultant shall take affirmative actions to ensure that applicants are employed, and that employees are treated during their employment, without regard to their race, religion, color, sex, disability or national origin. Such actions shall include, but not be limited to, the following: employment, upgrading, demotion or transfer recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. Consultant further agrees to insert a similar provision in all subcontracts, except subcontracts for standard commercial supplies or raw materials.

**19. LAWS AND REGULATIONS**

Consultant shall comply with its standard of care with regard to any and all laws, statutes, ordinances, rules, regulations and procedural requirements of any national, state or local government and of any agency of such government, including Authority, which relate to or in any manner affect the performance of this Agreement. This Agreement and any related documents supplied hereunder are subject to the California Public Records Act.

**20. CHOICE OF LAW**

All questions pertaining to the validity and interpretation of this Agreement shall be determined in accordance with the laws of California applicable to agreements made and to be performed within the state.

**21. FORCE MAJEURE**

It is expressly agreed that if the Consultant shall be delayed or interrupted in the performance or completion of its work hereunder by any act, neglect or default of the Authority, or of any employee of the owner, or of any other consultant employed by the Authority, or by an embargo, war, fire, flood, earthquake, epidemic or other calamity, act of God or of the public enemy, governmental act (including, but not restricted to, any government priority, preference, requisition, allocation, interference, restraint or seizure, or the necessity of complying with any governmental order, directive, ruling or request) or by any strike or labor dispute involving the Authority, or any manufacturer, supplier or carrier of the machinery, materials or supplies required hereunder, then the time of completion specified herein shall be extended for a period equivalent to the time lost as a result thereof.

**22. ENTIRE AGREEMENT**

This Agreement is the entire agreement of the parties. Consultant represents that in entering into this Agreement, it has not relied on any previous representations, inducements or understandings of any kind or nature.

**23. SEVERABILITY**

If any provision, or any portion of any provision, of any contract resulting from this proposal shall be held invalid, illegal or unenforceable, the remaining provisions or portions of any provisions shall be valid and enforceable to the extent possible.

**24. BENEFIT OF AGREEMENT**

This Agreement shall bind and benefit the parties hereto and their heirs, successors and permitted assigns.

**25. ATTORNEY'S FEES AND OTHER FEES**

Should either party institute any action to enforce this Agreement, or any provision hereof, the prevailing party in any such action or proceeding shall be entitled to receive from the other party all costs and expenses, including reasonable attorney's fees.

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto as of the day and year first written above.

**THE LIVERMORE AMADOR VALLEY  
TRANSIT AUTHORITY**

\_\_\_\_\_  
Executive Director

Date: \_\_\_\_\_

\_\_\_\_\_  
By\*

\_\_\_\_\_  
Title

\_\_\_\_\_  
By\*

\_\_\_\_\_  
Title

Date: \_\_\_\_\_

**APPROVED AS TO FORM:**

By: \_\_\_\_\_  
Attorney for the Authority

\*If Consultant is a corporation, two corporate officers must sign on behalf of the corporation as follows: (1) Chairman of the Board, President, or Vice President; and (2) Secretary, Assistant Secretary, Chief Financial Officer, or Assistant Financial Officer. In the alternative, this Contract may be executed by a single officer or a person other than an officer provided that evidence satisfactory to LAVTA is provided, demonstrating that such individual is authorized to bind the corporation (e.g., a copy of a certified resolution from the corporation's board or a copy of the corporation's by laws).

**APPENDIX C**

**LAVTA FY2018 MARKETING PLAN**



# **FY 2018 Marketing Plan**

**June 2017**

**Livermore Amador Valley Transit Authority**

## **Background**

During the past year, a number of improvements to service delivery were introduced by the Livermore Amador Valley Transit Authority (LAVTA) to better serve the Tri-Valley region. The changes included a major service restructuring and the introduction of new services designed to be more attractive to choice riders.

In August 2016, LAVTA implemented a major service redesign and resource reallocation effort. The changes included the elimination of unproductive routes that operated in low-density areas, a reduction in duplicative services, and directing additional resources into corridors serving the two Dublin/Pleasanton BART stations.

As a result, there are now two Rapid bus routes that provide weekday service every 15 minutes serving the two Tri-Valley BART stations and other key destinations along the routes. The Community Survey conducted prior to the development of the Comprehensive Operational Analysis (COA) confirmed the importance of providing convenient connections to and from BART. Nearly 90 percent of those surveyed reported having used BART for non-work related trips. Of those who indicated they rode BART for work trips, nearly 25 percent said they ride either every day or multiple times a week.

Another key part of the August 2016 service redesign was to greatly improve access to Las Positas College with the introduction of Rapid service to the campus. During the 2016/17 academic year, Las Positas College students were provided with unlimited access to all LAVTA services. As a result of these two actions, student ridership has increased by approximately 100 percent over the previous year.

The Go Dublin demonstration project was also implemented in the past year, offering a 50 percent discount, up to \$5.00, on rideshare trips taken with partners Uber, Lyft and DeSoto Cab. The Go Dublin promotion is paid for by local Transportation Development Act (TDA) funds from LAVTA and Measure BB funds from the Alameda County Transportation Commission.

In May 2017, the LAVTA Board of Directors concluded a year-long discussion of rebranding and potential new service names to replace the

“Wheels” brand as well as new vehicle designs. Ultimately, the Board voted to retain the Wheels name in part because it is well established and recognized in the community. The Board also agreed to update the Wheels fleet design and logo to more closely resemble the Rapid fleet and logo.

Another significant part of the background to this FY2018 Marketing Plan is the increased standing of the marketing function within the LAVTA administrative staff. As part of a reorganization approved by the LAVTA Board, the marketing function now reports directly to the Executive Director. A new Marketing Manager and Marketing and Communications Specialist were both hired during the first half of 2017.

## **FY 2018 Marketing Goals and Primary Target Markets**

LAVTA's primary marketing goals in FY 2018 are:

- By the end of FY 2018, increase monthly ridership figures by 5 percent compared to FY 2017 figures
- Work with Las Positas College faculty and staff to obtain a positive vote on a student fee referendum in Spring 2018 to provide a continuing funding source for the student pass program
- By the end of 2018, increase monthly visits to wheelsbus.com by 5 percent compared to FY 2017 figures

The majority of ridership based marketing activities will be focused on three primary target groups: residents and commuters along the two Rapid routes; students at Las Positas College; and students at the four Livermore schools participating in the Affordable Student Transit Pass Pilot (ASTPP).

In addition, marketing efforts will encourage increased ridership on high productivity Wheels bus routes, target the Go Dublin service area for increased utilization there, test the effectiveness of direct marketing to new residents, and increase utilization of digital platforms to reach our target audiences.

The delivery of 20 new buses for the Wheels bus fleet, along with the introduction of a new vehicle design and logo, provides the opportunity to promote the service delivery improvements that have been made in the past year.

## **Marketing Initiatives**

This section forms the core of the Marketing Plan. It defines in more detail the activities proposed for each of the goals and target markets identified in the previous section.

### Rapid Routes

The primary Rapid route target markets will include residents transferring to BART, residents commuting to other locations along the route, and students along both Rapid routes. Messaging themes will include: 15 minute weekday headways; coordinated schedules with BART trains; inconvenience of parking at BART stations; and other key destinations besides BART.

#### Tactics

1. Evaluate the strategies and tactics utilized in the SmartTrips Pleasanton Program and use lessons learned in developing a similar individualized marketing outreach effort along the Route 30R Dublin Boulevard corridor
2. Use targeted direct mail and/or door hangers to select residents within ¼ mile walk distance of Rapid routes
3. Use targeted digital marketing in key locations along the route
4. Develop a program to solicit current non-riders to commit to ride for a designated period of time, with a financial incentive for reporting on their experience to aid future marketing activities
5. Outreach to major employers along each Rapid route, including the opportunity for employers to choose information packets for employees or, for larger employers, a transit fair
6. Outreach to select events along the routes to include having a Rapid bus on display for potential riders to learn riding basics in a relaxed environment

### Las Positas College

The primary Las Positas target will be students who can utilize the Rapid Route 30R for direct travel to and from campus, students transferring from ACE and BART, as well as Los Positas faculty and staff. Messaging

themes will include: 15 minute weekday headways; coordinated schedules with BART trains; and students ride free with their student ID.

### Tactics

1. Execute a Memorandum of Understanding (MOU) with Las Positas College to clearly define what is expected from each party during the 2017-18 academic year
2. Establish a timeline of activities to be completed leading to a student fee ballot initiative in Spring 2018 to fund continuation of the Las Positas College Pass program
3. Continue on campus outreach activities on a regular basis to engage students, answer questions and encourage ridership, especially at the start of each semester
4. As part of MOU, establish in-kind marketing activities to be carried out by Las Positas including email blasts, on campus signage, website information and links, and other campus activities

### Affordable Student Transit Pass Pilot (ASTPP) Students

Four Livermore schools will be participating in the Alameda County Transportation Committee's (ACTC) ASTPP program during the 2017-18 academic year, including returning participants East Avenue Middle and Livermore High and two new schools, Christensen Middle School and Del Valle Continuation High School, bringing the total number of students with access to a free LAVTA pass to approximately 3,200 for the upcoming year. Messaging themes will include: convenience of service in proximity to the four schools; real time transit apps; use of Wheels and Rapid service for trips other than to and from school; and independence.

### Tactics

1. Coordinate outreach efforts with ACTC and consultant staff administering the program as well as faculty and staff at each of the four schools
2. Because Tri-Valley students participating in the ASTPP during the 2017-18 school year will be issued Clipper Cards for the

first time, outreach efforts will include information on how to use the card on LAVTA services as well as on other Bay Area transit services

3. Encourage use of the student pass for non-school related trips, including after school sports and activities, recreational and shopping trips
4. Engage students through interactive social media activities

### Go Dublin

The Go Dublin program was implemented in early 2017. The demonstration project is intended to allow LAVTA to provide service into areas where traditional fixed route bus service does not make sense, and provide mobility to more people at a lower cost by providing a 50 percent discount on uberPOOL, Lyft Line or DeSoto Share trips. Messaging themes will include: difficulty in parking at BART stations; the availability of the 50 percent discount; and the convenience of using this service with existing rideshare apps by simply entering a coupon code.

#### Tactics

1. Direct mail to select residents not served by the Rapid Route 30R
2. Tabling at BART stations
3. Direct outreach by Uber, Lyft and DeSoto Cab to their customers
4. Targeted digital marketing

### Existing Riders

Current riders have already taken the steps necessary to learn how to use Wheels or Rapid services. Many of these riders fall into the category of transit dependent. The most recent LAVTA Passenger Survey asked how riders would have made a trip if not on Wheels. Over 80 percent said they would either walk, get a ride, use a bike or just not make the trip. The opportunity exists to encourage additional ridership by these current passengers by encouraging the use of fare media they may not be aware

of. Messaging themes will include; the benefits of using the Clipper Card to obtain unlimited access for a day for less than the cost of two cash fares.

#### Tactics

1. Interior bus signs describing the unlimited access feature of the Day Pass available by using the Clipper card
2. Tabling at the downtown Transit Center to promote the Day Pass feature

#### New Residents

Individuals who are new to or have relocated within the Tri-Valley region may not be aware of the convenient transit options available. Some who move may have been motivated to their new location by proximity to BART, but may have been unaware of parking availability issues. This particular marketing effort will target individuals who have moved to a new residence located within walk distance of a Rapid bus route with less than a 15 minute travel time to a BART Station. Messaging themes will include: 15 minute weekday headways on Rapid routes; coordinated schedules with BART trains; inconvenience of parking at BART stations; other key destinations besides BART; and other LAVTA services.

#### Tactic

1. Test direct mail outreach targeting individuals who have moved to a new residence located in target area described above.

#### New Wheels buses, fleet design and logo

After considerable deliberation, the LAVTA Board decided to maintain the Wheels name, but to introduce an updated vehicles design and logo. The new look of the Wheels fleet design, the introduction of 20 new buses and service delivery improvements provide a unique opportunity to retain existing riders and encourage non-riders to give the service a try.

Messaging themes include: more direct service, improved on-time performance, comfort and cleanliness of vehicles, and a freshening of the look of the vehicles.



## Tactics

1. Introduce new vehicle design in a manner TBD as new buses being manufactured in Fall 2017 are placed into revenue service
2. Use opportunity of fresh look of vehicles to promote improvements in service delivery, including directness of service and on-time performance
3. For Wheels buses not being retired with the new vehicle order, begin process of wrapping with new vehicle design and logo
4. As timetables, brochures and on-street static inserts for bus stops are scheduled for replacement, introduce new logo to those marketing pieces
5. Design and begin installation of new Wheels bus stop signs
6. Change the Wheels logo on website, phone app, and social media tools

## Community Outreach

LAVTA will participate in selected public outreach events during FY18 to promote goodwill for the agency and to provide an opportunity to engage with the public in general about Wheels and Rapid bus services.

- Alameda County Fair – Rideo bus display - June/July 2016
- Stuff-a-bus – solicit co-sponsor to reinstitute popular program – November/December 2017
- Livermore and Pleasanton Holiday Parades – vehicles entered in both parades – December 2017
- Dublin St Patrick's Day Parade & Festival – enter vehicle in parade; staff a booth at festival – March 2018
- Bike to Work Day – co-sponsor an energizer station with Lawrence Livermore Lab; provide promotional item for BTWD participants – May 2018

- Art Shelter Program – continue successful program and introduce new art shelter at the end of the 2017-18 academic year – May/June 2018
- Livermore Rodeo Parade – Rideo vehicle in parade – June 2018

## **Budget**

The following line items were included in the approved FY 2018 LAVTA Budget in support of the above activities.

### Operating

#### Professional Services

- Individualized marketing \$130,000
- On-call graphic design \$ 50,000
- Translation \$ 2,000

#### Other Outside Services

- Printing \$ 50,000

#### Advertising

- Direct marketing \$ 50,000
- Digital/electronic \$ 30,000
- Print \$ 15,000

#### Miscellaneous

- Rebranded Wheels service \$ 20,000
- Promotional Items \$ 10,000
- Art shelter program \$ 5,000

### Capital

- New Wheels bus stop signs \$ 50,000
- Vehicle wraps – new design \$175,000