

June 14, 2023

RE: Request for Proposal (RFP) for Public Outreach Services

Dear Proposers,

The Livermore Amador Valley Transit Authority (LAVTA), operator of the Wheels bus system in the Tri-Valley community in eastern Alameda County, seeks a qualified consultant to perform public outreach services for a very near-term service planning exercise (Wheels in Motion). The public outreach is needed to solicit input from Wheels bus riders, Tri-Valley residents and stakeholders on several bus service scenarios that are being designed in response to the Bay Area Rapid Transit (BART) service change taking place later this year. LAVTA seeks a qualified firm that can quickly develop and execute a robust public outreach strategy.

LAVTA invites you to submit a proposal to provide Public Outreach Services for its Wheels in Motion service plan as further detailed in the Scope of Services, Appendix A, to this RFP ("Services").

LAVTA anticipates awarding a contract for a one-year term to the highest-ranked Proposer. The successful Proposer will execute an Agreement for Services for a not-to-exceed compensation.

LAVTA intends to adhere to the following solicitation timeline, which is subject to change at its discretion:

<u>Activity</u>	<u>Date</u>
RFP Issued	6/14/23
Questions, and Requests for Clarification/ (RFCs) Due	6/23/23
LAVTA's Response to Questions and RFCs	6/28/23
Proposals Due	7/10/23
Interviews (if needed)	Week of 7/17/23
Contract Award (tentative)	7/21/23
Notice to Proceed (tentative)	7/26/23

All Questions and/or RFCs must be submitted in writing by email to Tamara Edwards at tedwards@lavta.org.

LAVTA's written response to Questions and/or RFCs will be posted on LAVTA's website or will be emailed to Proposers who received a copy of the RFP. Please refer to the above solicitation timeline.

Proposals will be received via email to Tamara Edwards at tedwards@lavta.org until **2:00 p.m. on July 10, 2023**. Hard copy submissions will NOT be accepted. Hard copies received will be returned (unopened) to Proposers without consideration.

Proposers must submit a Cost Proposal that provides a detailed cost outline including but not limited to, hourly rates for proposed personnel (by title), hourly rates and/or fixed fees for specific types of services and outreach options, and packaged or tiered pricing based on a number of in-person and virtual events. Costs must include, but not be limited to, all labor, shipping, postage, materials, supplies, taxes, overhead, insurance, and profit and all other costs necessary to perform the work. A Proposer's failure to submit a Cost Proposal may result in rejection of the proposal as non-responsive.

Submission of a proposal constitutes a firm offer to LAVTA for 120 days from the submission deadline for proposals. Submission of a proposal indicates acceptance by a firm of the conditions contained in this RFP unless clearly and specifically noted in the proposal submitted and confirmed in the Agreement between LAVTA and the firm selected.

For questions regarding this RFP, please contact Tamara Edwards at (925) 455-7566 or tedwards@lavta.org.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Christy Wegener', with a long horizontal flourish extending to the right.

Christy Wegener
Executive Director

Attachments

1. PROPOSAL CONTENTS AND REQUIREMENTS

A. Company Qualifications & Approach to Scope of Services

Each Proposer must complete Proposal Cover Form (Form 1), and provide information about its company so that LAVTA can evaluate the firm's stability and ability to support the commitments set forth in response to the RFP.

The successful proposer will demonstrate its approach to the scope of services in its proposal, including, but not limited to, information demonstrating that the Proposer:

- Employs proven tools to execute effective multi-lingual public outreach in a public transportation landscape.
- Has demonstrated experience with developing professional outreach materials for both digital and hard-copy use.
- Has demonstrated experience with public outreach with successful outcomes, particularly in a public transit environment.
- Has a demonstrated understanding of local conditions, project goals and LAVTA's desired outcomes.

Proposers must describe the qualifications and experience of the proposed project team. The proposal must adequately demonstrate the Proposer's understanding of the project and LAVTA's desired outcomes. The proposal must also identify any critical issues for the project and propose methods to address and track those issues.

Proposers must describe their experience in providing the specified services for similar operations and/or entities, including public transportation agencies, if any (refer to Appendix A). Additionally, Proposers must provide a minimum of three (3) and a maximum of five (5) references of clients for whom, within the past five (5) years, the Proposer has provided similar services as those called for in this RFP. For each submitted Reference Form (Form 2), Proposers must supply a brief description of the services provided, the timeframe the services were provided, and current client contact information.

If the Proposer is a joint venture partner, an executed copy of the Joint Venture Agreement must be included with the proposal. The organizational arrangement and specific areas of responsibility (including administrative, technical, and financial) for each member of the joint venture must be outlined.

B. Use of Subconsultants

A Consultant intending to use any subconsultants to perform the Services must do so in accordance with the requirements of this RFP. Any and all subconsultants must be listed on the Designation of Subcontractors/Subconsultants/Suppliers Form (Form 4), submitted with the proposal and approved by LAVTA prior to contract award.

C. Addenda to RFP

LAVTA reserves the right to amend this RFP at any time. Any amendments to or interpretations of the RFP must be described in written Addenda.

Only signed Addenda, issued by LAVTA's authorized personnel, are binding. Proposers are required to acknowledge receipt of all Addenda, if any, during the submission of their proposals.

All Addenda issued must become part of the RFP. Proposers must acknowledge the receipt of each individual addendum in their proposals on the Proposal Cover Form, (Form 1). Proposer's failure to acknowledge in its proposal receipt of Addenda may, at LAVTA's sole option, cause the proposal to be rejected.

D. Conflicts of Interest

By submitting a proposal, the Proposer represents and warrants that no director, officer or employee of LAVTA is in any manner interested directly or indirectly in the proposal or in the Agreement that may be made under it or in any expected profits to arise therefrom, as set forth in Article 4, Division 4, Title I (commencing with Sec. 1090) of the Government Code of the State of California. The Proposer warrants and represents that it presently has no financial interest and agrees that it will not acquire any financial interest which would present a conflict of interest under California Government Code Sections 1090 *et seq.* or Sections 87100 *et seq.* during the performance of services under this Agreement. The Proposer further covenants that it will not knowingly employ any person having such an interest in the performance of this Agreement. Violation of this provision may result in this Agreement being deemed void and unenforceable.

2. EVALUATION OF PROPOSALS AND SELECTION PROCESS

LAVTA intends to award a contract to the highest ranked, most qualified, responsible Proposer that submits a responsive proposal for provision of the Services. LAVTA reserves the right to request additional information and clarifications during the evaluation and selection process from any or all Proposers regarding their proposals.

A. Selection Committee

A Selection Committee (Committee), which will include members of LAVTA's staff and possibly one or more outside experts, will review and rank the proposals submitted. The Committee's evaluation for all steps of the evaluation process will comprise the official record for the proposal evaluation process; individual evaluation records will not be available for public inspection at any point during or after the evaluation process. By submitting a proposal, Proposers agree to be bound by these terms and will not later challenge said terms.

B. Proposal Evaluation Process

The Proposers' proposal will be evaluated utilizing the criteria identified below. In ranking proposals, LAVTA will consider the proposal material submitted, oral interviews (if any are held) and any other relevant information about a given Proposer(s) (i.e. references).

Evaluation Criteria	Possible Technical Outcome
<p>Company Qualifications, Experience & References:</p> <ul style="list-style-type: none"> • Prior experience history and qualifications of Consultant in providing like services in a transit or similar environment. • Demonstrated experience with public outreach with successful outcomes, particularly in a public transit environment. • Qualifications and experience of the proposed project team. 	<p>0 – 25 POINTS</p>
<p>Project Understanding:</p> <ul style="list-style-type: none"> • The consultant’s proposal adequately demonstrates an understanding of the project and desired outcomes. • Identification of critical issues to the project and methods to track/address those issues. 	<p>0 – 20 POINTS</p>
<p>Reasonableness of Cost: This portion of the proposal will be evaluated based on reasonableness of the proposed costs. Costs will be compared to costs LAVTA or other comparable public agencies have paid for similar services, and to what is considered to be the industry’s standard and customary costs for the services. Proposed costs will also be compared to any independent cost estimates.</p>	<p>0 – 20 POINTS</p>
<p>Approach to Scope of Services: The Consultant’s proposal adequately describes approach to the scope of work described in Section 1A and Appendix A.</p> <ul style="list-style-type: none"> • Employs proven tools to execute effective multi-lingual public outreach. • Demonstrated understanding of local conditions, 	<p>0 – 35 POINTS</p>

<p>project goals and desired outcomes.</p> <ul style="list-style-type: none">• Demonstrated experience with developing professional materials for both digital and hard-copy use.	
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C. Revised Proposals, Interviews and Negotiations

Following the initial review and screening of proposals, one or more Proposers may be invited to participate in the next step of the selection process.

LAVTA reserves the right to negotiate with any individual(s) or qualified firm(s), to request revised proposals, to visit the Proposer(s)' site(s), to interview or not, or to request best and final offers (BAFOs), if it is in the best interest of LAVTA to do so. During this step, the Committee will evaluate Financial Statements and Audit Reports submitted by Proposers in the competitive range. Upon completion of this step in the selection process, the Committee will re-rank the firms remaining in the competitive range, in accordance with the evaluation criteria set forth above.

LAVTA also reserves the right to further reduce the competitive range at any time during this step of the evaluation and selection process and LAVTA may hold simultaneous discussions with those proposers that remain in the competitive range. Proposers who are no longer in the competitive range, and will therefore not continue to the final step of the selection and evaluation process, will be notified as soon as it is practicable

LAVTA may accept the proposal, or may negotiate with the highest-ranked firms, the terms and conditions of the Agreement and/or the firms' cost proposal including, but not limited to, the proposed hourly labor rates, overhead rates, profit fees, and/or billing rates as applicable. At this time, LAVTA may elect to request revised and/or best and final offers (BAFOs) from all of the firms remaining in the competitive range. At its sole discretion, LAVTA may also reject all proposals. LAVTA also may award an Agreement without conducting interviews or negotiations.

LAVTA reserves the right to modify or cancel the procurement in whole or in part, at its sole discretion, at any time before the Agreement is fully executed and approved on behalf of LAVTA. This RFP does not commit LAVTA to award an Agreement, to pay any costs incurred in the preparation of the proposal for this request, or to procure or contract for services. LAVTA reserves the right to reject any and all proposals, to accept the proposal it considers most favorable to LAVTA's interest in its sole discretion, and to waive irregularities or informalities in any proposal or in the proposal procedures.

If there is any evidence indicating that two or more Proposers are in collusion to restrict competition or are otherwise engaged in anti-competitive practices, the proposals of all such Proposers must be rejected, and such evidence may be a cause for disqualification of the participants in any future solicitations undertaken by LAVTA.

3. CONFIDENTIALITY

A. Confidentiality and Waiver of Claims

1. The California Public Records Act (Cal. Govt. Code Sections 7920.000 et seq.) (CPRA) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the content of the proposal, as well as any other written communication between LAVTA and the Proposer, is a public record that must be made available to the public.
2. If the Proposer believes any communication contains information exempt from disclosure under the CPRA, including trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer's competitive position if disclosed, the Proposer must request that LAVTA withhold from disclosure the exempt information by submitting:
 - a) an unredacted copy of the proposal marking each page containing such exempt information as confidential; and
 - b) a redacted copy of the proposal that redacts the purportedly exempt information; and
 - c) a separate "confidentiality index" including all of the following information:
 - (1) The section and page number of the proposal where the information is located; and
 - (2) An explanation of why the information is exempt from disclosure under the CPRA.
3. By submitting a proposal, Proposer:
 - a) consents to the release of the redacted version of the proposal; and
 - b) consents to the release of any portion of its proposal not included in the confidentiality index; and
 - c) waives all claims against LAVTA, its directors, officers, employees and agents, for the disclosure of such information.
4. If the Proposer does not include a confidentiality index in its proposal, LAVTA will have no obligation to withhold any information from disclosure and may release the information sought without liability to LAVTA.
5. In the event of conflicts between the redacted version, the confidentiality index, and confidentiality designations in the body of the proposal, the redacted version prevails.
6. A Proposer may not designate its entire proposal as confidential. LAVTA will not honor such designations and will disclose submittals so designated to the public without liability to LAVTA.

4. WAIVER

By submitting a proposal, the Proposer represents and warrants that it has sufficiently informed itself in all matters affecting the performance of the work or the furnishing of the labor, supplies, material, or equipment called for in the Agreement; that the prices stated in its proposal are correct and as intended by it and are a complete and correct statement of its prices for performing the work or furnishing the labor, supplies, materials, or equipment required by the Agreement.

5. CONTRACTUAL REQUIREMENTS

B. Agreement for Services

The selected Proposer for the provision of the Services will be required to execute an Agreement with LAVTA describing the Scope of Services to be performed, compensation, insurance requirements and other pertinent provisions. Submittal of a proposal must be deemed acceptance of all of the terms set forth in this RFP and the Sample Agreement unless the Proposer(s) includes with its proposal, in writing, any modifications requested to the RFP and/or Sample Agreement as set forth on the Exception Form (Form 3). No exceptions may be requested after the deadline for the submittal of proposals.

C. Disadvantaged Business Enterprises (DBE) Policy

LAVTA is committed to and has adopted a Disadvantaged Business Enterprise (DBE) Policy to ensure non-discrimination in the award and administration of all contracts and to create a level playing field on which DBEs can compete fairly for contracts and subcontracts relating to construction, procurement, and professional services activities. Proposers are encouraged to obtain DBE participation on this project, although no contract-specific DBE participation goal has been established for this contract. Proposers must cooperate with LAVTA in meeting its commitments and objectives with regard to ensuring nondiscrimination in the award and administration of contracts and must use their best efforts to ensure that barriers to DBEs participation do not exist.

D. Insurance and Indemnification Requirements

Proposers are instructed to carefully review the insurance and indemnification provisions set forth in the Insurance Requirements (Appendix C) and Sample Agreement (Appendix B), and provide evidence of Proposer's acceptance and ability to comply.

Proposers shall submit evidence of ability to provide insurance and meet the stated insurance requirements of LAVTA. Said evidence shall take the form of a current Certificate of Liability Insurance (COLI) or a letter from Proposer's insurance agent or

broker certifying that such insurance requirements can be obtained. If the certificate does not cover the requirements as specified in the Insurance Requirements (Appendix C), verification of availability of required insurance must otherwise be provided.

6. PROPOSAL SUBMISSION CHECKLIST

To expedite the release of proposal documents to reviewers, you are instructed to provide the required documents in Adobe PDF format (unless otherwise noted) as follows.

1. Form 1: Proposal Cover Form
2. Proposal (RFP, Section 1)
3. Insurance Requirements: Certificate of Insurance or Letter from Insurance Broker (RFP, Section 5.D and Appendix C)
4. Cost Proposal
5. Forms 2, 3, 4, and 5:
 - Form 2: Reference Form
 - Form 3: Exception Form
 - Form 4: Designation of Subconsultants/Suppliers

FORMS

Form 1 – Proposal Cover Form

Form 2 – Reference Form

Form 3 – Exception Form

Form 4 – Designation of Subcontractors/Subconsultants/Suppliers

APPENDICES

Appendix A – Scope of Services

Appendix B – Sample Agreement for Services

Appendix C – Insurance Requirements

FORM 1: PROPOSAL COVER FORM

**PROPOSAL COVER FORM
for
Public Outreach Services
RFP # 2023-05**

Livermore Amador Valley Transit Authority
Livermore, CA

A. GENERAL INFORMATION

DATE SUBMITTED: _____

NAME OF FIRM UNDER WHICH BUSINESS IS CONDUCTED:

DISCIPLINE(S) FOR WHICH YOU ARE PROPOSING IN THIS SUBMITTAL

B. PROPOSAL CONTACT PERSON INFORMATION

NAME AND TITLE: _____

STREET ADDRESS: _____

MAILING ADDRESS, IF DIFFERENT: _____

EMAIL ADDRESS: _____

OFFICE PHONE NUMBER: _____

CELL PHONE NUMBER: _____

C. CONDITIONS:

1. The Request for Proposals, required Forms, and Addenda, if any, are made a part of this Proposal.

2. The undersigned acknowledges receipt of the following Addenda (e.g.1, 2, 3, 4, etc.), if any:

3. The undersigned understands and agrees to be bound to the proposed Scope of Services and Cost Proposal for 120 days from the date of Proposal submittal.

4. The undersigned is prepared to sign the Sample Agreement for Services without alterations or exceptions or if it is requesting modifications to the Sample Agreement and/or any requirements of this RFP, has included such requested modifications in its proposal. Exceptions, or modifications, if any, should be clearly identified and submitted on the Exception Form (Form 3).

SIGNED:

The undersigned certify that I/we submit this Proposal and sign this Proposal Cover Form with full and proper authorization to do so and have read, understood, and will comply with all the terms and conditions set forth in the RFP documents. *

Signature

Signature

Printed Name

Printed Name

Title

Title

***Note:**

If a sole owner, it must be signed by the owner of the company.

If a corporation, it must be signed by a Corporate Officer who has full and proper authorization to bind the Corporation to the proposal.

If a joint venture, it must be signed on behalf of each participating company by officers or other individuals who have the full and proper authorization to bind each company to the proposal.

If a partnership, it must be signed under the partnership name by a partner of the firm and the name of each partner must be provided.

FORM 2: REFERENCE FORM

Proposers must list the company name and contact information as well as the status of contract(s) where the firm has either provided services as a prime consultant or as a subconsultant during the past five (5) years. A separate form must be provided for each contract the Proposer held/holds with the same company. A **minimum of three (3) and a maximum of five (5) different references must be provided** for whom similar products and/or services were provided. DO NOT USE LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY AS REFERENCES.

If contract was terminated, Proposer must list the reason for termination. Proposer also must identify and state the status of any litigation, claims or settlement agreements related to any of the identified contracts.

_____	_____
Company	Project Description
_____	_____
Address	\$ Project / Contract Value
_____	_____
City, State, Zip	Award Date / End Date
_____	_____
Contact Name	() Telephone
_____	_____
Contact Title	Email

Scope and Status of Contract: _____

Other: _____

_____	_____
Name	Telephone Number
_____	_____
Title	Email Address

Note: Please complete this form for each reference provided

FORM 3: EXCEPTION FORM

Submittal of a proposal shall be deemed acceptance of all the terms set forth in this RFP, including the Sample Agreement for Services, unless the Proposer includes with its proposal, in writing, any exceptions or modifications requested by the Proposer.

COMPANY NAME: _____

EXCEPTIONS: _____NO; _____YES. If YES, list below all exceptions to the solicitation documents and requirements, including exceptions to the Sample Agreement for Services and Insurance Requirements. Number each exception and attach additional copied pages of this form as necessary.

#	Document	Section	Exception/Issue	LAVTA's Response
1				
2				
3				
4				
5				

FORM 4: DESIGNATION OF SUBCONTRACTORS/SUBCONSULTANTS/SUPPLIERS

Proposer's Name: _____ Is your firm a Small Business Enterprise: Yes _____ No _____
 Address: _____ Firm's Annual Gross Receipts: _____ Age of Firm: _____
 Phone: () _____

Instructions: Proposer MUST provide information below for ALL subcontractors/subconsultants/suppliers ("sub-bidders") that provided Proposer a bid, quote, or proposal for work, services or supplies associated with this contract. This information shall be provided for all sub-bidders regardless of tier for both DBEs and non-DBEs alike. Include all bid acceptance(s) AND rejection(s). Please state "None" if there are no sub-bids.

	Subcontractors/Subconsultant/Supplier Firm Name/Address/Phone/Contact Person	DBE (Yes/No)	Please indicate system name, description of Work, Services, or Supplies.	Dollar Amount or Percentage of Work, Services, or Supplies	Bid/Quote/Proposal Accepted? (Yes/No)
1					
2					
3					

Note: Do not indicate more than one "Yes" in the column "Bid/Quote/Proposal Accepted" for alternative subconsultants for the same work. Use additional sheets if necessary.

By submitting a proposal, the Consultant certifies that it will enter into a formal agreement with the subcontractor(s), subconsultant(s) and/or supplier(s) whose bid/quote/proposal was accepted conditioned upon execution of a contract with LAVTA. The Consultant certifies that any DBE listed whose bid/quote/proposal was accepted will be performing a commercially useful function on the contract.

Appendix A

SCOPE OF WORK

SCOPE OF WORK

Wheels Public Outreach

Scope of Work

The Livermore Amador Valley Transit Authority (LAVTA), operator of the Wheels bus system in the Tri-Valley community in eastern Alameda County, seeks a qualified consultant to perform public outreach services for its Wheels In Motion service plan that is launching in Summer 2023. The public outreach is needed to solicit input from Wheels bus riders, Tri-Valley residents and stakeholders on several bus service scenarios that are being designed in response to the Bay Area Rapid Transit (BART) service change taking place later this year (September 11, 2023). LAVTA seeks a firm that can quickly develop and execute a robust public outreach strategy, including development of multi-lingual professional infographics that clearly articulate up to three bus service scenarios. The selected firm (Consultant) will successfully engage with current Wheels bus riders, as well as provide an online platform to collect feedback on the service alternatives.

Background

In September 2023, BART intends to modify its schedule to operate trains every 20-minutes, 7-days a week, shifting the schedule from operating trains every 15-minutes (30-minutes on weekends) as it does today. BART's schedule change is happening in response to changing post-Pandemic ridership patterns which include fewer downtown San Francisco commuters and more off-peak and weekend ridership. This is a trade-off and a pivot away from the traditional focus on the weekday commuter markets traveling into San Francisco and Oakland, and a shift to focus on the off-peak rider.

In 2015, Wheels conducted the Wheels Forward study, which incorporated data, public outreach, market research and stakeholder input to develop a new bus network that prioritized frequency over coverage with the focus on building ridership going to BART and Las Positas College. The Wheels Forward network, implemented in Fall 2016, includes two Rapid routes designed and scheduled to connect with every BART train: Route 10R operates from Livermore to BART via Pleasanton and Route 30R operates from Livermore to BART via Las Positas College and Dublin. Low-ridership routes were eliminated and innovative mobility services including a partnership with Uber and Lyft for discounted pooled rides were implemented in place.

Prior to the Pandemic, the Wheels system was enjoying ridership gains year-over-year. Since the Pandemic, nearly all of the student riders have returned to the system; however, local ridership including on the Rapid routes remains at 50%. With BART moving to a 20-minute frequency, the current 15/30-minute Wheels services will no longer seamlessly connect to BART trains without a major overhaul. Given post-Pandemic travel patterns, the BART system change provides the opportunity to rethink the Wheels bus network and develop options about how, when, and where to connect riders in the Tri-Valley. It is another opportunity to revisit the coverage versus frequency priorities from 2016 and to better understand if riders want expanded off-peak service or want to continue high-frequency weekday service, as well as to prioritize connectivity to BART.

Wheels staff will use input gathered from this outreach in order to make a recommendation for the new Wheels bus network, which should be approved by the Board by December 2023. The target implementation date is in January 2024.

Scope of Services

Task 1: Project Management and Outreach Strategy

This task encompasses the high-level management of the process, including meetings with LAVTA staff, and stakeholders. Additionally, this task supports the development of the outreach and public participation strategy for the planning process.

1.1 Attend and facilitate a project kick-off meeting with LAVTA staff.

1.2 Coordinate scope of work execution on a weekly basis with LAVTA's project manager.

1.3. Public Outreach Plan Development - Meet with LAVTA staff to develop a successful community engagement strategy, including identifying key stakeholder and neighborhood groups, community-based organizations, partner agencies, engagement with stakeholder groups, bus operators, the Tri-Valley Accessible Advisory Committee (TAAC) and internal staff. The strategy will identify the decision-making opportunities throughout the planning process, existing venues that can be leveraged if needed, the role of social media and online platforms as well as detailing the responsibilities of the Consultant and LAVTA staff.

Deliverables:

- Weekly project management team meetings.
- Public Outreach Plan that outlines specific actions, events and tasks, community and stakeholder partners, and roles/responsibilities for LAVTA and Consultant team.

Task 2: Infographics and Online Platform Development

This task reviews the planning service scenarios developed by LAVTA agency staff for the BART schedule service change, which will be sent to the consultant team in an electronic format (Remix or similar platform) and that the Consultant will use to generate materials for outreach purposes in order to gather rider and stakeholder input on the potential network changes.

2.1. LAVTA Service Scenario Review - Consultant will review all necessary service scenario information provided by LAVTA including but not limited to: route alignment and frequency, connectivity to BART, connectivity to other Wheels buses, span/days of service, and coverage. Consultant will summarize the pros/cons and tradeoffs for each scenario and include that information in outreach materials.

2.2. Service Scenario Infographics - Based on the outreach plan from Task 1 and using the information generated from Task 2.1, Consultant will develop multi-lingual infographics that detail each of the service scenarios, including maps and service level

tables. There should be collateral generated for each route with a potential routing or schedule change (up to 15) as well as a project factsheet and up to three high-level network summaries. The infographics should be translated into Spanish.

2.3 Online Platform – Using the infographics from task 2.2, the Consultant will design and host a microsite or incorporate a page on the existing wheelsbus.com website that details all the service scenarios and potential route changes.

Deliverables:

- Consultant will develop necessary materials and infographics (website, boards, handouts, meeting slides, etc.) that will support outreach activities.
- Consultant will develop a microsite or incorporate a page onto the existing Wheels website.
- Consultant will develop an online survey or data collection form and translate the final version into Spanish. The survey or form will be used in outreach activities (printed) as well as incorporated into the online platform, and will be used to collect data in order to inform LAVTA decision-makers on community bus service preferences.

Task 3: Execute Outreach Plan

This task involves the execution of the Public Outreach Plan that was developed in Task 1. This task includes the printing of all collateral and the facilitation of an online survey/data collection form.

3.1 Printing collateral: Working with LAVTA staff to determine appropriate quantities, Consultant will be responsible for printing any paper-materials that will be distributed or posted in the field or on the buses.

3.2 In-person outreach: Working with LAVTA staff and per the outreach plan roles and responsibilities, the Consultant will execute in-person outreach to collect feedback on the potential service scenarios, either through verbal comments, a paper survey, an online survey, or through other methods. This could include distributing information onboard buses and at key locations in the service area, or posting flyers and notices with a link to the survey. This could also include the use of field staff (ambassadors) who can ride buses or stage at strategic locations to collect feedback from riders.

3.3 Community meetings: Working with LAVTA staff and per the outreach plan roles and responsibilities, the Consultant will facilitate up to two in-person or online community meetings/Town Halls.

3.3 Stakeholder outreach: Working with LAVTA staff and per the outreach plan roles and responsibilities, the Consultant will facilitate collecting stakeholder input on the service scenarios either through an online or in-person meeting.

3.4 Operator outreach: Working with LAVTA staff and per the outreach plan roles and responsibilities, the Consultant will facilitate collecting bus operator input on the service scenarios either through up to three, half-day tabling events at LAVTA's operations facility in Livermore.

Deliverables: Consultant will print all required materials as well as provide materials in electronic formats, secure any in-person outreach locations, provide staffing and train ambassador staff for in-person outreach.

Task 4: Summarize Outreach Findings

This task is the summary of outreach findings including a report with the survey and the findings from the rider, resident and stakeholder input.

4.1 Outreach findings: The Consultant will summarize any feedback received while conducting in-person outreach and will translate and input any paper surveys received into the online form or survey tool.

4.2 Survey findings: The Consultant will provide a detailed report of the survey results, including responses for each scenario and potential route change, demographic information, as well as an executive summary.

4.3 Presentation Materials: The Consultant will develop a final report in the form of a PowerPoint (PPT) that can be used for the staff recommended service plan at the Board of Directors meeting.

Deliverables: A final report that includes an executive summary, outreach findings and survey data in a PPT format.

June 14, 2023

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All Questions and/or RFCs must be submitted in writing by email to Tamara Edwards at tedwards@lavta.org.

LAVTA's written response to Questions and/or RFCs will be posted on LAVTA's website or will be emailed to Proposers who received a copy of the RFP. Please refer to the above solicitation timeline.

Proposals will be received via email to Tamara Edwards at tedwards@lavta.org until **2:00 p.m. on July 10, 2023**. Hard copy submissions will NOT be accepted. Hard copies received will be returned (unopened) to Proposers without consideration.

Proposers must submit a Cost Proposal that provides a detailed cost outline including but not limited to, hourly rates for proposed personnel (by title), hourly rates and/or fixed fees for specific types of services and outreach options, and packaged or tiered pricing based on a number of in-person and virtual events. Costs must include, but not be limited to, all labor, shipping, postage, materials, supplies, taxes, overhead, insurance, and profit and all other costs necessary to perform the work. A Proposer's failure to submit a Cost Proposal may result in rejection of the proposal as non-responsive.

Submission of a proposal constitutes a firm offer to LAVTA for 120 days from the submission deadline for proposals. Submission of a proposal indicates acceptance by a firm of the conditions contained in this RFP unless clearly and specifically noted in the proposal submitted and confirmed in the Agreement between LAVTA and the firm selected.

For questions regarding this RFP, please contact Tamara Edwards at (925) 455-7566 or tedwards@lavta.org.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Christy Wegener', with a long horizontal flourish extending to the right.

Christy Wegener
Executive Director

Attachments

1. PROPOSAL CONTENTS AND REQUIREMENTS

A. Company Qualifications & Approach to Scope of Services

Each Proposer must complete Proposal Cover Form (Form 1), and provide information about its company so that LAVTA can evaluate the firm's stability and ability to support the commitments set forth in response to the RFP.

The successful proposer will demonstrate its approach to the scope of services in its proposal, including, but not limited to, information demonstrating that the Proposer:

- Employs proven tools to execute effective multi-lingual public outreach in a public transportation landscape.
- Has demonstrated experience with developing professional outreach materials for both digital and hard-copy use.
- Has demonstrated experience with public outreach with successful outcomes, particularly in a public transit environment.
- Has a demonstrated understanding of local conditions, project goals and LAVTA's desired outcomes.

Proposers must describe the qualifications and experience of the proposed project team. The proposal must adequately demonstrate the Proposer's understanding of the project and LAVTA's desired outcomes. The proposal must also identify any critical issues for the project and propose methods to address and track those issues.

Proposers must describe their experience in providing the specified services for similar operations and/or entities, including public transportation agencies, if any (refer to Appendix A). Additionally, Proposers must provide a minimum of three (3) and a maximum of five (5) references of clients for whom, within the past five (5) years, the Proposer has provided similar services as those called for in this RFP. For each submitted Reference Form (Form 2), Proposers must supply a brief description of the services provided, the timeframe the services were provided, and current client contact information.

If the Proposer is a joint venture partner, an executed copy of the Joint Venture Agreement must be included with the proposal. The organizational arrangement and specific areas of responsibility (including administrative, technical, and financial) for each member of the joint venture must be outlined.

B. Use of Subconsultants

A Consultant intending to use any subconsultants to perform the Services must do so in accordance with the requirements of this RFP. Any and all subconsultants must be listed on the Designation of Subcontractors/Subconsultants/Suppliers Form (Form 4), submitted with the proposal and approved by LAVTA prior to contract award.

C. Addenda to RFP

LAVTA reserves the right to amend this RFP at any time. Any amendments to or interpretations of the RFP must be described in written Addenda.

Only signed Addenda, issued by LAVTA's authorized personnel, are binding. Proposers are required to acknowledge receipt of all Addenda, if any, during the submission of their proposals.

All Addenda issued must become part of the RFP. Proposers must acknowledge the receipt of each individual addendum in their proposals on the Proposal Cover Form, (Form 1). Proposer's failure to acknowledge in its proposal receipt of Addenda may, at LAVTA's sole option, cause the proposal to be rejected.

D. Conflicts of Interest

By submitting a proposal, the Proposer represents and warrants that no director, officer or employee of LAVTA is in any manner interested directly or indirectly in the proposal or in the Agreement that may be made under it or in any expected profits to arise therefrom, as set forth in Article 4, Division 4, Title I (commencing with Sec. 1090) of the Government Code of the State of California. The Proposer warrants and represents that it presently has no financial interest and agrees that it will not acquire any financial interest which would present a conflict of interest under California Government Code Sections 1090 *et seq.* or Sections 87100 *et seq.* during the performance of services under this Agreement. The Proposer further covenants that it will not knowingly employ any person having such an interest in the performance of this Agreement. Violation of this provision may result in this Agreement being deemed void and unenforceable.

2. EVALUATION OF PROPOSALS AND SELECTION PROCESS

LAVTA intends to award a contract to the highest ranked, most qualified, responsible Proposer that submits a responsive proposal for provision of the Services. LAVTA reserves the right to request additional information and clarifications during the evaluation and selection process from any or all Proposers regarding their proposals.

A. Selection Committee

A Selection Committee (Committee), which will include members of LAVTA's staff and possibly one or more outside experts, will review and rank the proposals submitted. The Committee's evaluation for all steps of the evaluation process will comprise the official record for the proposal evaluation process; individual evaluation records will not be available for public inspection at any point during or after the evaluation process. By submitting a proposal, Proposers agree to be bound by these terms and will not later challenge said terms.

B. Proposal Evaluation Process

The Proposers' proposal will be evaluated utilizing the criteria identified below. In ranking proposals, LAVTA will consider the proposal material submitted, oral interviews (if any are held) and any other relevant information about a given Proposer(s) (i.e. references).

Evaluation Criteria	Possible Technical Outcome
<p>Company Qualifications, Experience & References:</p> <ul style="list-style-type: none"> • Prior experience history and qualifications of Consultant in providing like services in a transit or similar environment. • Demonstrated experience with public outreach with successful outcomes, particularly in a public transit environment. • Qualifications and experience of the proposed project team. 	0 – 25 POINTS
<p>Project Understanding:</p> <ul style="list-style-type: none"> • The consultant's proposal adequately demonstrates an understanding of the project and desired outcomes. • Identification of critical issues to the project and methods to track/address those issues. 	0 – 20 POINTS
<p>Reasonableness of Cost: This portion of the proposal will be evaluated based on reasonableness of the proposed costs. Costs will be compared to costs LAVTA or other comparable public agencies have paid for similar services, and to what is considered to be the industry's standard and customary costs for the services. Proposed costs will also be compared to any independent cost estimates.</p>	0 – 20 POINTS
<p>Approach to Scope of Services: The Consultant's proposal adequately describes approach to the scope of work described in Section 1A and Appendix A.</p> <ul style="list-style-type: none"> • Employs proven tools to execute effective multi-lingual public outreach. • Demonstrated understanding of local conditions, 	0 – 35 POINTS

<p>project goals and desired outcomes.</p> <ul style="list-style-type: none">• Demonstrated experience with developing professional materials for both digital and hard-copy use.	
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C. Revised Proposals, Interviews and Negotiations

Following the initial review and screening of proposals, one or more Proposers may be invited to participate in the next step of the selection process.

LAVTA reserves the right to negotiate with any individual(s) or qualified firm(s), to request revised proposals, to visit the Proposer(s)' site(s), to interview or not, or to request best and final offers (BAFOs), if it is in the best interest of LAVTA to do so. During this step, the Committee will evaluate Financial Statements and Audit Reports submitted by Proposers in the competitive range. Upon completion of this step in the selection process, the Committee will re-rank the firms remaining in the competitive range, in accordance with the evaluation criteria set forth above.

LAVTA also reserves the right to further reduce the competitive range at any time during this step of the evaluation and selection process and LAVTA may hold simultaneous discussions with those proposers that remain in the competitive range. Proposers who are no longer in the competitive range, and will therefore not continue to the final step of the selection and evaluation process, will be notified as soon as it is practicable

LAVTA may accept the proposal, or may negotiate with the highest-ranked firms, the terms and conditions of the Agreement and/or the firms' cost proposal including, but not limited to, the proposed hourly labor rates, overhead rates, profit fees, and/or billing rates as applicable. At this time, LAVTA may elect to request revised and/or best and final offers (BAFOs) from all of the firms remaining in the competitive range. At its sole discretion, LAVTA may also reject all proposals. LAVTA also may award an Agreement without conducting interviews or negotiations.

LAVTA reserves the right to modify or cancel the procurement in whole or in part, at its sole discretion, at any time before the Agreement is fully executed and approved on behalf of LAVTA. This RFP does not commit LAVTA to award an Agreement, to pay any costs incurred in the preparation of the proposal for this request, or to procure or contract for services. LAVTA reserves the right to reject any and all proposals, to accept the proposal it considers most favorable to LAVTA's interest in its sole discretion, and to waive irregularities or informalities in any proposal or in the proposal procedures.

If there is any evidence indicating that two or more Proposers are in collusion to restrict competition or are otherwise engaged in anti-competitive practices, the proposals of all such Proposers must be rejected, and such evidence may be a cause for disqualification of the participants in any future solicitations undertaken by LAVTA.

3. CONFIDENTIALITY

A. Confidentiality and Waiver of Claims

1. The California Public Records Act (Cal. Govt. Code Sections 7920.000 et seq.) (CPRA) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the content of the proposal, as well as any other written communication between LAVTA and the Proposer, is a public record that must be made available to the public.
2. If the Proposer believes any communication contains information exempt from disclosure under the CPRA, including trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer's competitive position if disclosed, the Proposer must request that LAVTA withhold from disclosure the exempt information by submitting:
 - a) an unredacted copy of the proposal marking each page containing such exempt information as confidential; and
 - b) a redacted copy of the proposal that redacts the purportedly exempt information; and
 - c) a separate "confidentiality index" including all of the following information:
 - (1) The section and page number of the proposal where the information is located; and
 - (2) An explanation of why the information is exempt from disclosure under the CPRA.
3. By submitting a proposal, Proposer:
 - a) consents to the release of the redacted version of the proposal; and
 - b) consents to the release of any portion of its proposal not included in the confidentiality index; and
 - c) waives all claims against LAVTA, its directors, officers, employees and agents, for the disclosure of such information.
4. If the Proposer does not include a confidentiality index in its proposal, LAVTA will have no obligation to withhold any information from disclosure and may release the information sought without liability to LAVTA.
5. In the event of conflicts between the redacted version, the confidentiality index, and confidentiality designations in the body of the proposal, the redacted version prevails.
6. A Proposer may not designate its entire proposal as confidential. LAVTA will not honor such designations and will disclose submittals so designated to the public without liability to LAVTA.

4. WAIVER

By submitting a proposal, the Proposer represents and warrants that it has sufficiently informed itself in all matters affecting the performance of the work or the furnishing of the labor, supplies, material, or equipment called for in the Agreement; that the prices stated in its proposal are correct and as intended by it and are a complete and correct statement of its prices for performing the work or furnishing the labor, supplies, materials, or equipment required by the Agreement.

5. CONTRACTUAL REQUIREMENTS

B. Agreement for Services

The selected Proposer for the provision of the Services will be required to execute an Agreement with LAVTA describing the Scope of Services to be performed, compensation, insurance requirements and other pertinent provisions. Submittal of a proposal must be deemed acceptance of all of the terms set forth in this RFP and the Sample Agreement unless the Proposer(s) includes with its proposal, in writing, any modifications requested to the RFP and/or Sample Agreement as set forth on the Exception Form (Form 3). No exceptions may be requested after the deadline for the submittal of proposals.

C. Disadvantaged Business Enterprises (DBE) Policy

LAVTA is committed to and has adopted a Disadvantaged Business Enterprise (DBE) Policy to ensure non-discrimination in the award and administration of all contracts and to create a level playing field on which DBEs can compete fairly for contracts and subcontracts relating to construction, procurement, and professional services activities. Proposers are encouraged to obtain DBE participation on this project, although no contract-specific DBE participation goal has been established for this contract. Proposers must cooperate with LAVTA in meeting its commitments and objectives with regard to ensuring nondiscrimination in the award and administration of contracts and must use their best efforts to ensure that barriers to DBEs participation do not exist.

D. Insurance and Indemnification Requirements

Proposers are instructed to carefully review the insurance and indemnification provisions set forth in the Insurance Requirements (Appendix C) and Sample Agreement (Appendix B), and provide evidence of Proposer's acceptance and ability to comply.

Proposers shall submit evidence of ability to provide insurance and meet the stated insurance requirements of LAVTA. Said evidence shall take the form of a current Certificate of Liability Insurance (COLI) or a letter from Proposer's insurance agent or

broker certifying that such insurance requirements can be obtained. If the certificate does not cover the requirements as specified in the Insurance Requirements (Appendix C), verification of availability of required insurance must otherwise be provided.

6. PROPOSAL SUBMISSION CHECKLIST

To expedite the release of proposal documents to reviewers, you are instructed to provide the required documents in Adobe PDF format (unless otherwise noted) as follows.

1. Form 1: Proposal Cover Form
2. Proposal (RFP, Section 1)
3. Insurance Requirements: Certificate of Insurance or Letter from Insurance Broker (RFP, Section 5.D and Appendix C)
4. Cost Proposal
5. Forms 2, 3, 4, and 5:
 - Form 2: Reference Form
 - Form 3: Exception Form
 - Form 4: Designation of Subconsultants/Suppliers

FORMS

Form 1 – Proposal Cover Form

Form 2 – Reference Form

Form 3 – Exception Form

Form 4 – Designation of Subcontractors/Subconsultants/Suppliers

APPENDICES

Appendix A – Scope of Services

Appendix B – Sample Agreement for Services

Appendix C – Insurance Requirements

FORM 1: PROPOSAL COVER FORM

**PROPOSAL COVER FORM
for
Public Outreach Services
RFP # 2023-05**

Livermore Amador Valley Transit Authority
Livermore, CA

A. GENERAL INFORMATION

DATE SUBMITTED: _____

NAME OF FIRM UNDER WHICH BUSINESS IS CONDUCTED:

DISCIPLINE(S) FOR WHICH YOU ARE PROPOSING IN THIS SUBMITTAL

B. PROPOSAL CONTACT PERSON INFORMATION

NAME AND TITLE: _____

STREET ADDRESS: _____

MAILING ADDRESS, IF DIFFERENT: _____

EMAIL ADDRESS: _____

OFFICE PHONE NUMBER: _____

CELL PHONE NUMBER: _____

C. CONDITIONS:

1. The Request for Proposals, required Forms, and Addenda, if any, are made a part of this Proposal.

2. The undersigned acknowledges receipt of the following Addenda (e.g.1, 2, 3, 4, etc.), if any:

3. The undersigned understands and agrees to be bound to the proposed Scope of Services and Cost Proposal for 120 days from the date of Proposal submittal.

4. The undersigned is prepared to sign the Sample Agreement for Services without alterations or exceptions or if it is requesting modifications to the Sample Agreement and/or any requirements of this RFP, has included such requested modifications in its proposal. Exceptions, or modifications, if any, should be clearly identified and submitted on the Exception Form (Form 3).

SIGNED:

The undersigned certify that I/we submit this Proposal and sign this Proposal Cover Form with full and proper authorization to do so and have read, understood, and will comply with all the terms and conditions set forth in the RFP documents. *

Signature

Signature

Printed Name

Printed Name

Title

Title

*Note:

If a sole owner, it must be signed by the owner of the company.

If a corporation, it must be signed by a Corporate Officer who has full and proper authorization to bind the Corporation to the proposal.

If a joint venture, it must be signed on behalf of each participating company by officers or other individuals who have the full and proper authorization to bind each company to the proposal.

If a partnership, it must be signed under the partnership name by a partner of the firm and the name of each partner must be provided.

FORM 2: REFERENCE FORM

Proposers must list the company name and contact information as well as the status of contract(s) where the firm has either provided services as a prime consultant or as a subconsultant during the past five (5) years. A separate form must be provided for each contract the Proposer held/holds with the same company. A **minimum of three (3) and a maximum of five (5) different references must be provided** for whom similar products and/or services were provided. DO NOT USE LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY AS REFERENCES.

If contract was terminated, Proposer must list the reason for termination. Proposer also must identify and state the status of any litigation, claims or settlement agreements related to any of the identified contracts.

Company

Project Description

Address

\$
Project / Contract Value

City, State, Zip

Award Date / End Date

Contact Name

(_____)_____
Telephone

Contact Title

Email

Scope and Status of Contract: _____

Other: _____

Name

Telephone Number

Title

Email Address

Note: Please complete this form for each reference provided

FORM 3: EXCEPTION FORM

Submittal of a proposal shall be deemed acceptance of all the terms set forth in this RFP, including the Sample Agreement for Services, unless the Proposer includes with its proposal, in writing, any exceptions or modifications requested by the Proposer.

COMPANY NAME: _____

EXCEPTIONS: _____NO; _____YES. If YES, list below all exceptions to the solicitation documents and requirements, including exceptions to the Sample Agreement for Services and Insurance Requirements. Number each exception and attach additional copied pages of this form as necessary.

#	Document	Section	Exception/Issue	LAVTA's Response
1				
2				
3				
4				
5				

FORM 4: DESIGNATION OF SUBCONTRACTORS/SUBCONSULTANTS/SUPPLIERS

Proposer's Name: _____ Is your firm a Small Business Enterprise: Yes _____ No _____
 Address: _____ Firm's Annual Gross Receipts: _____ Age of Firm: _____
 Phone: () _____

Instructions: Proposer MUST provide information below for ALL subcontractors/subconsultants/suppliers ("sub-bidders") that provided Proposer a bid, quote, or proposal for work, services or supplies associated with this contract. This information shall be provided for all sub-bidders regardless of tier for both DBEs and non-DBEs alike. Include all bid acceptance(s) AND rejection(s). Please state "None" if there are no sub-bids.

	Subcontractors/Subconsultant/Supplier Firm Name/Address/Phone/Contact Person	DBE (Yes/No)	Please indicate system name, description of Work, Services, or Supplies.	Dollar Amount or Percentage of Work, Services, or Supplies	Bid/Quote/Proposal Accepted? (Yes/No)
1					
2					
3					

Note: Do not indicate more than one "Yes" in the column "Bid/Quote/Proposal Accepted" for alternative subconsultants for the same work. Use additional sheets if necessary.

By submitting a proposal, the Consultant certifies that it will enter into a formal agreement with the subcontractor(s), subconsultant(s) and/or supplier(s) whose bid/quote/proposal was accepted conditioned upon execution of a contract with LAVTA. The Consultant certifies that any DBE listed whose bid/quote/proposal was accepted will be performing a commercially useful function on the contract.

APPENDIX C: INSURANCE REQUIREMENTS

INSURANCE. If SELLER is providing services to the AUTHORITY, SELLER shall maintain workers' compensation insurance in accordance with state requirements. SELLER shall also maintain commercial general liability insurance, including automobile liability insurance, in the amount of at least \$1,000,000 per claim. AUTHORITY reserves the right to require submittal of a certificate of insurance naming the AUTHORITY, its directors, officers, employees and agents as additional insureds. In addition, SELLER shall maintain professional liability insurance if applicable.