

REQUEST FOR PROPOSAL
SAN JOAQUIN VALLEY BLUEPRINT ROADMAP

Council of Fresno County Governments
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Additional background information on this proposal can be found on
the Fresno COG website!

www.fresnocog.org

September, 2009

REQUEST FOR PROPOSALS

SAN JOAQUIN VALLEY BLUEPRINT ROADMAP

I. Introduction

In 2006, the SJV Regional Blueprint planning process developed the foundation for the Blueprint by creating an institutional framework and citizen outreach plan. In addition, this joint venture initiated the development of the SJV Blueprint Vision. In 2009, the Blueprint process continues to make progress with this historic and collaborative planning effort among the eight San Joaquin Valley COGs and their working partners.

The goal of the San Joaquin Valley (SJV) Region Blueprint planning process is to address critical issues facing the vitality of the San Joaquin Valley (as well as the State of California and the nation) in planning for the future of the world's foremost agricultural region. The SJV Regional Blueprint will guide the future of infrastructure development, and in turn accommodate the exploding population and economic growth in the region to the year 2050.

A. Work and Accomplishments to Date

Working in concert over the past three years, the eight COGs in the San Joaquin Valley have accomplished many goals that have moved the process closer to the benchmark of reaching consensus on a Valleywide preferred growth scenario. These accomplishments are even more noteworthy when one considers that each step along the way required approval or endorsement by eight separate and distinct policy boards. The sixty-two cities, eight counties and eight councils of governments are proud of the collaborative effort they have made to reach this point in the process and are committed to more of the same for the future.

In general, the major tasks undertaken can be summarized as follows:

Institutional Framework, Project Management and Community Outreach: In order reach the daunting goal of coordinating eight counties in an effort to reach a unified vision for growth, the SJV Blueprint process created a project management team comprised of a program manager from the lead agency and project managers representing each of the other seven COGs. This team was responsible for coordinating local efforts as well as maintaining the Valley connection. During the initial phases, activities were conducted at both the county and the Valley levels. The third year activities culminated in the selection, by the Regional Policy Council, of an integrated Valley Vision on April

1, 2009. Extensive local community outreach touched thousands of community members and stakeholder groups throughout the Valley. Three major Valleywide events were planned: the Blueprint Kickoff Workshop in June of 2006, the Blueprint Executive Forum (aimed primarily at the Valley's elected officials) in April of 2008 and a Valleywide Summit in January 2009 where the Valleywide alternative scenarios were presented to the public at large.

Land use, Transportation and Air Quality Modeling: The Valleywide model steering committee worked closely with U.C. Davis to become familiar with UPlan and to collect GIS and demographic data. Extensive communication was required to assemble general plan information from all 70 jurisdictions involved. Status Quo scenarios were developed in each county to provide a base case for comparison. Alternatives scenarios were also created. All county level scenarios were analyzed using land use, traffic and air quality models in order to compare the scenarios on performance measures. This process was replicated at the Valleywide level.

Individual County Planning Process: As mentioned above, each of the eight Valley COGs conducted the Blueprint process at their local level, which included convening roundtable stakeholder groups, engaging their member agencies and conducting outreach activities to community groups and the general public. Much time has been invested in working with local agency planners in order to gain their trust and commitment so that the ultimate Blueprint will be integrated at the local level.

Valley Planning Process: The Valley planning process has been ongoing since the SJV Blueprint grant was first awarded in 2006. The eight COGs have been collaborating on a Valleywide basis as part of the project management team. In addition the effort has partnered with the Great Valley Center and their staffing of the Blueprint Regional Advisory Committee, during its tenure. The SJV Air District has also been a partner both financially and in kind. In addition, the individual COGs have worked closely with Caltrans and UC Davis on many of the technical activities.

Document Creation, Implementation Strategy, and Blueprint Certification Process: Thus far, the SJV Blueprint has produced a variety of communication materials including websites, videos, brochures, print and electronic media advertising and extensive project reports. Mapping exercises have produced a multitude of excellent graphic depictions which help member agencies, stakeholder groups and the general public to understand the sometimes complex concepts that are being portrayed. Ultimately, the Blueprint must be integrated into local general planning processes in order to ensure implementation. Now, with the legal requirements of AB 32 and SB 375, some type of certification process will need to be established so that the planning principles defined in the Blueprint will be implemented throughout the Valley.

Modeling: It is widely known that the traditional 4-step travel demand model is not sensitive to the benefits of smart growth development such as Density, Diversity, Destination & Design (often referred to as 4-D). There have been efforts to integrate a 4-D process into the traffic model to compensate for the trip/vehicle miles traveled (VMT)

reduction that smart growth brings in the previous San Joaquin Valley Blueprint process. The results were encouraging, and reinforced the support of smart growth in the Valley. As the San Joaquin Valley Blueprint marches into the integration stage, more and more smart growth projects will be built. The scenario-based 4-D process, which was developed during the scenario planning stage, would not be applicable in the integration stage. A project-based 4-D tool will be needed to measure the travel reduction benefits of smaller scale or even individual projects.

During the scenario planning stage of the San Joaquin Valley Blueprint process, UPlan, a scenario modeling tool developed by UC Davis, has been used by all 8 Valley COGs. It was mostly run at the County level. Due to the fact that each Valley COG's traffic model has different socio-economic categories, individual efforts were taken by each COG to translate the UPlan land use categories into the categories in each of the 8 traffic models in the Valley. Then the traffic model output was input into the EMFAC model to measure the emissions from on-road mobile exhaust. In the integration stage when Blueprint principles are incorporated in local projects, more fine-grained software choices will be explored for community, neighborhood, or even project-level planning.

Traditionally, socio-economic data projection for the traffic model has been done manually through an agency reviewing process, which could take up to 6 months to complete. With the emergence of land use models, land use forecasting could be generated by computers. However, the rule-based land use models could direct future land use to improbable locations without human intervention. The consequence would be misrepresented traffic distribution if it is run through the traffic model. Therefore, inputs from local land use experts become critical in the land use modeling process. Throughout the scenario planning stage in the Blueprint process, several iterations of UPlan runs were conducted for each scenario with inputs from local planners and stakeholders. This "feedback" process will continue to be a central part of the integration stage in the San Joaquin Valley Blueprint.

Visualization Tool Development and Scenario Planning Tools: The San Joaquin Valley Blueprint Process has been and will continue to be conducted through a "bottoms-up" approach to securing government and community support. Computer generated maps showcasing and explaining the local and Valleywide Blueprint options will be generated by UC Davis/Valley COGs and circulated to the Valley communities through public outreach efforts orchestrated by the Great Valley Center, and by each individual planning agencies. Public meetings with interactive voting technology have and will be used to obtain feedback from the public and elected officials. Other technologies in use are interactive websites, media outlets for radio, television and print media, emailed updates and newsletters to established and growing lists. We also work with a variety of community, business and government agencies throughout the Valley to disseminate information via presentations at their pre-scheduled meetings, posting articles in their newsletters and online publications and by mailing printed documents.

Health and Obesity Awareness: According to the Prevention Institute, the built environment is the designated use, layout, and design of a community's physical

structures - including its housing, businesses, transportation systems, and recreational resources, all of which affect patterns of living that influence health. Smart growth strategies can transform the built environment to encourage physical activity by making a community more walkable and can provide greater access to healthy food options, thus contributing to healthier eating. To bridge land use, transportation, community design efforts and public health, a comprehensive approach to planning can be implemented that focuses on identifying priority areas where public health strategies can be incorporated within the local planning process. In the short-term, these planning efforts will help create healthier lifestyles; in the long-term, these efforts can have a measurable impact upon chronic health conditions such as obesity, diabetes, stroke and heart disease.

II. Scope of Services/Tasks

Task 1: Work Accomplished in First Three Years of Blueprint Planning:

Produce a written **summary** that captures the Valleywide **process** and the **product** of the first three years of the Blueprint process.

Task 1.1 Prepare/develop a comprehensive document that captures the process, outcomes and the essence of the first three years of the blueprint (Planning Phase):

The Written document should be compiled onto several reproducible CD/DVDs. This document should include graphics, maps, pictures statistics as well as written detail about the planning phase.

The intended audience for this document is likely to be those practitioners and professionals with a familiarity with this or other Blueprint Plans seeking a more thorough and in-depth review of the Valleywide Blueprint process.

Task 1.2 Develop a companion to the main document.

This document also needs to synthesize the 12 Principles and should have the look and feel of brochure or media advertisement. This is a document that would act as a user friendly overview. This document should also include graphics, maps, pictures statistics as well as written detail about the planning phase.

The intended audience for this companion document is the General Public, Stakeholders and Community and Constituent Groups with little exposure to the nuts and bolts of the Valleywide Blueprint.

Task 1.3 Produce an Executive Summary capturing the major themes of the full Blueprint Document specified above.

The audience for this document should be elected officials and executive local management and should serve to educated decision makers with a range of understanding and exposure to the Valleywide Blueprint Process. From newly appointed officials and department heads to those peripherally involved, this executive summary should bring the targeted audience generally informed level of appreciation.

Task 2: Ongoing Blueprint Planning:

Develop an implementation plan with supportive policies and performance measures, including recommendations for next steps.

Task 2.1 Develop performance measures for each of the 12 Valley Blueprint Principles for varying community and/or subregion populations.

Task 2.2 Identify the institutional arrangements that will be necessary to successfully carry out Blueprint implementation and make recommendations for implementation oversight. Examples would include the roles of the Policy Council, COGs, and local agencies.

These arrangements should be consistent with the bottoms-up approach used throughout the Blueprint process and should carefully account for local control. They should also take into consideration the relationship between state mandates such as AB32 and SB375 and various institutions charged with their integration.

Task 2.3 Develop performance measures for assessment that institutions can use to guide them through the implementation process, using measures that should be followed to implement the Blueprint.

Task 2.4 Identify and evaluate valley-wide programs, projects, and policies that support the Valley Blueprint.

This section should identify the collective perspective of common interests and objectives of the Valley so that the Valleywide Blueprint is not simply 8 different Blueprints patchworked together. What are the projects that are common to all: State Route 99, water resources, air quality, High Speed Rail, freight movement, etc.? What framework can be established to oversee and integrate these issues?

Task 2.5 Identify the financial resources that will be needed to implement the Blueprint at the Valley and local levels.

This should include both traditional funding sources, such as grants, and should also examine a variety of potential, non-traditional funding mechanisms.

Task 2.6 Create a toolkit of resources to implement the 12 Valley Blueprint Principles into the local planning processes.

Task 2.6.1 Identify the **Legal Issues** in planning associated with land use regulation as well as enacted legislation.

Task 2.6.2 Develop a **Common Issues** curriculum to educate on such issues as air quality or adequate housing for residents, resources, etc. These tools are aimed at providing an overview for community stakeholders as well as elected officials and executive local management to facilitate community discussion. It should also include a more in depth section for planning practitioners to delve deeper into substantive issues.

Task 2.6.3 Develop a **Toolkit** to support local level practitioner with codes and zoning ordinances, policy, plans, bylaws, and techniques that can be used to address particular issues related to integrating Blueprint principles into the local planning process. This resource should be broken down into several different toolkits for various size local jurisdictions (example attached). In addition the summary of each tool should describe how it can be used and have an accompanying list of where to find additional resources.

Task 2.6.4 Identify the training requirement and the resources that will be needed to translate and integrate the Blueprint effort into the local planning process.

Local level implementation of the Blueprint is critical if the principles of the Blueprint are to materialize. Without local integration, the Blueprint becomes a document that “sits on a shelf.”

How can Blueprint principles be integrated into the local General Plans? What tools will be needed for local practitioners and elected officials to address local implementation?

Task 2.6.5 Attach a range of pertinent **Case Studies** from around the Valley and the State providing examples of how rural, suburban and urban areas have addressed similar planning issues.

Task 3 Ongoing Outreach:

Develop recommendations for electronic media to enhance public outreach in the ongoing Blueprint process

Task 3.1 Develop a list of electronic media tools and/or strategies to reach a broad audience of public stakeholders, elected officials and practicing professionals. Should include but not be limited to such tools as websites, forums, blogs, advertisements, publications, etc. Review existing www.Valleyblueprint.org during this process.

Task 3.2 Prepare a strategy and/or educational curriculum/tools to expose students of varying ages to the process, principles and practice of Blueprint planning.

III. Possible Example of Task 2 Deliverables:

Tool	City/Unincorporated Community		
	Large	Med.	Small
Accessory Units	x	x	x
Adaptive Re-use			
Alternative Energy Regulation			
Bike Plan			x
Community Design Workshop			
Community Identity Guidelines			
Community/Project Visualization	x	x	
Complete Streets Cross Sections			
Conservation strategies			
Water			
Energy			
Design Guidelines			
Downtown			
Activity Centers			
Commercial Corridors			
Higher Density Development			
Mixed use Developments			
Neighborhood			
Neighborhood Centers			
Industrial			
Design Review Regulations			
Design Charette – How to			
Model Development Code			
Form Based			
Zoning			
Subdivision			
Downtown Regulations			

General Plan Template

Greenhouse Gas Emissions Calculator

Historic Preservation Regulations

Impact Fees

Overlay Districts

Land Conservation Tools

Landscape Standards

Secure – By design

Shared Parking Standards

Signing

Street Standards

Street System Guidelines

Trail way standards

Transfer of Developments Rights

Tree Ordinance, Urban Forestry

Smart Growth Score Card

Density Bonuses Ordinance

Urban Boundary Regulation

Visual Preference Survey

Task 2.7 Develop a schedule for key milestone products for the short term (5-yr).

Task 2.8 Develop a schedule for key milestone products for the long term (20-yr).

Task 2.9 Identify possible barriers preventing change as well as the driving forces for change which will support the Blueprint's implementation at the local levels.

Task 2.10 Prepare a comprehensive document and executive summary for Task 1.

IV. Project Coordination and Schedule

The consultant will take primary direction from the Fresno COG Project Manager. It is intended that all work for the Final Document and tasks outlined in Task 1 will be completed within three (3) months and all work or the Planners' Toolkit and tasks outlined in Task 2 and 3 will be completed in nine (9) months **of issuing a contract** in accordance with the schedule component and that the consultant's work will begin immediately upon receiving a notice to proceed.

The selected consultant will best demonstrate the ability to deliver quality work on schedule and in a cost-effective manner, consistent with the tasks and deliverables in this RFP.

The consultant shall prepare draft reports summarizing the work for Tasks 1 through 3. The draft report will include a summary work report as necessary. The draft reports shall be provided in PDF and Word format to Fresno COG for review and comment.

Following comments, the consultant shall modify the draft to create a final report. Ten copies of the final report shall be prepared and provided to Fresno COG. In addition a digital file of the final report shall be provided in PDF format

File copies of all correspondence, technical memoranda and reports should be delivered to the Fresno COG Project Manager on disk in MS Word 2003 and MS Excel 2003.

The consultant shall provide monthly progress reports to the Fresno COG Project Manager. These monthly status reports will include descriptions of work tasks completed that month, and will identify any issues that may affect project schedule or project deliverables.

The consultant shall provide quarterly presentations and/or committee meetings throughout the 9 month process. No less than 3 final presentations shall be required of the final product of Tasks 2 and Task 3

All data, maps and all other materials prepared or collected under this contract will become the property of Fresno COG.

Important Dates

Activity	Date
Request for Proposals (RFP) Released	September 2, 2009
Deadline for Proposal Submittal	September 30, 2009
Interviews/Selection	Wednesday, Oct 14, 2009
Policy Board Approval	October, 2009
Notice to Proceed - Subject to Contract Signing	November 1, 2009
Completion of Project Final Document and Task 1	Feb 1, 2010
Completion of Project Planners' Toolkit and Task 2	Aug 1, 2011

V. Proposal Requirements

Special emphasis will be placed on timely completion of the work products by the prospective consultant. The Proposer will indicate actions that will be taken to ensure compliance with the schedule. Any suggested variations from the schedule will be indicated in the Proposer's response. Three (3) months have been allotted for project completion of Task 1 and nine (9) months for Task 2 and Task 3 from date of contract execution. Any extensions to the schedule will require a formal written request from the consultant to the Fresno COG project manager. The Fresno COG project manager and the San Joaquin Valley Blueprint Roadmap will monitor the schedule to ensure proper and timely performance by the contractor.

Attached, as Attachment "B" is a sample Project Schedule. We encourage proposers to use and modify the sample in the Attachment to streamline their proposal development and to make it easier for the reviewers to compare proposals. A digital spreadsheet version of the Attachments can be found on the Fresno COG website at www.fresnocog.org.

Respondents should develop a detailed schedule as part of their proposal. This schedule should show estimated completion dates for deliverables and presentations. The selected consultant will be expected to perform all work necessary to complete the scope of work. The consultant will take primary direction from the Fresno COG project manager and the San Joaquin Valley Blueprint Roadmap Committee. It is intended that all work will be completed within nine (9) months of negotiating a contract in accordance with the schedule component and that the consultant's work team will begin immediately upon signing a contract.

Selection

Clarity and conciseness are essential and will be considered in assessing the proposer's capabilities. Proposal content and completeness are important. All consultant proposals submitted in response to this request will be screened by a review committee. The committee will determine, through the screening process, which consultants will be invited to make formal presentations and be interviewed by the selection committee. The selection committee reserves the right to make a final selection without an interview.

One reproducible and seven copies of the proposal must be received at the Council of Fresno County Governments by **Friday, September 30, 2009 by 5:00 P.M. pacific standard time**. Proposals not received by that date and time *will not be considered*.

VI. Proposal Format

In order to simplify the review process and maximize the degree of comparative analysis, the proposal should be organized in the following manner:

A. Transmittal letter

The transmittal letter should be signed by an official authorized to bind the consultant contractually and will contain a statement to the effect that the proposal is a firm offer for 90 days. The letter accompanying the proposal will also provide the following: name, title, address, and telephone number of

individuals with the authority to negotiate and contractually bind the company. The transmittal shall contain a statement of understanding of the RFP.

B. Table of Contents

Include identification of the material by section and page number.

C. Overview

This section should clearly convey the consultants understanding of the nature of the work and the general approach to be taken to its performance. This section should include, but not be limited to, a discussion of the purpose of the project, the organization of the project effort, and a summary of the proposed approach.

D. Detailed Work Plan

The prospective contractor shall provide a schedule for completing the project, within the schedule set forth in this RFP. The schedule shall identify the major tasks to be undertaken and the time frame for each task.

This section should include the following components:

1. Task Description

Include a full description of each step to be followed in carrying out the project. The work description should be presented in sufficient detail (tasks, subtasks, etc.) to show a clear understanding of the work and the proposed approach.

2. Deliverables

A description of the format, content, and level of detail that can be expected for each deliverable.

3. Schedule

A schedule showing the expected sequence of tasks, subtasks, etc. should accompany the work description. Important milestones should be identified on the schedule.

E. Management Approach

This section should describe the firm's management approach. If the proposal is a team effort, the distribution of work among the team members should be indicated. Describe the organization of the management, the structure of the work assignments, and any specific features of the management approach that require special explanation. Designate by name the project manager to be employed who will oversee the project. **No substitutions of the identified project manager will be allowed without prior approval of Fresno COG.**

Include the name and qualifications of all professional personnel to be employed, a resume for each professional (included in an appendix), a statement indicating how many hours each professional will be assigned to the contract and what tasks each professional will perform. Staffing assignments should be specific enough to demonstrate understanding of skills required and commitment of proper resources. **The selected consultant will not substitute members of the project team without prior approval of Fresno COG.**

F. Budget and Billing Format

A cost analysis of the proposed budget will be done by COFCG staff. Under various circumstances the budget could be subject to Preaudit and/or the final cost subject to Post audit by COFCG or Caltrans division of Audits and Investigations. The allowability of individual items of cost will be determined by 48 CFR, Federal Acquisition Regulations System, Chapter 1, Part 31 et. Seq. The Contractor will also be required to comply with 49 CFR, Part 18, and Uniform Administrative Requirement for Grants and Cooperative Agreements to State and Local Governments. The contractor should have an accounting system capable of segregating direct cost from indirect costs per the above cited regulations. The Contractor and Subcontractors will comply with all applicable laws and maintain books, documents, papers, and accounting records for a period of three years from the date of the final payment.

1. Method of Payment

The cost proposal must be prepared consistent with the method of services provided under this agreement and will be reimbursed, by one of, or a combination of the methods below. The proposer must clearly state the method used to prepare the cost proposal.

- Lump Sum payment
- Actual Cost plus Fixed Fee
- Specific Rates of Compensation

Lump Sum proposals will be paid per milestone of completed work or at the end of the contract upon acceptance of the final product. Actual Cost plus Fixed Fee agreements shall be billed at actual payroll costs and include a fixed fee for profit. In agreements reimbursed by Specific Rates of Compensation, billing rates containing a component for profit will be negotiated that will not change during the term of the contract.

2. Project Budget

A maximum of **\$200,000** has been budgeted for consultant services for this project.

3. Task Budget

A schedule of estimated costs to complete each task should add down to the total cost of the project (see Attachments C & D). The task budget should include a subsidiary breakdown by task of hours and billing rate charges. To ensure a full understanding of the resources committed to the project the schedule should clearly indicate the amount of hours key personnel will be used in each task.

4. Budget and Cost Breakdown

The prospective consultant will prepare a detailed cost breakdown for the work to be performed during the project regardless of the method of reimbursement chosen. This will include all tasks required to complete the project including final reports and presentation.

a. Direct Labor Costs – A schedule of billing rates and hours worked by employee or category of employee is required of the prime contractor and all subcontractors. Billing rates shall be based on actual pay rates and should cover all costs associated with the employee (salary, benefits, and anticipated cost of living and/or merit increases during the term of the contract). Depending on the individual cost structure, overhead may be applied as a component of the billing rate or applied separately. The proposer should be prepared to validate billing rates with payroll registers, wage agreements, or other payroll documentation.

b. Overhead Rates – The overhead rate should include all indirect cost not readily assignable to cost objectives specifically benefited. Typically an overhead rate is calculated on a company or division wide basis by segregating expenses into direct cost and indirect cost categories and then dividing the indirect costs by a direct cost base such as direct labor to arrive at an overhead rate. The overhead rate is then applied on a contract by contract basis to recapture the indirect costs that are not chargeable directly to a final objective such as general and administrative, facilities, equipment, supplies, accounting, maintenance, materials, etc. Some cost structures may be broken into various overhead rates that are applied to different bases. The proposer should be prepared to provide supporting documentation such as prior agreements with government agencies or audits of prior year activities to validate overhead rates structures.

c. Direct Cost – Direct costs are those incremental costs that can be identified specifically with a particular final cost objective. Although in some instances direct cost and indirect cost may include similar categories, incremental direct cost attributable to final objectives must be separated and not included in the overhead calculation. All direct cost specifically attributed to the project and not included in the billing rates must be itemized by budget category to be eligible for reimbursement. Once contractually authorized, direct cost budgets may not be substituted without prior written consent of COFCG.

d. Sub consultant Fees – Sub consultants must provide the same cost data detail as the prime contractor (see Table I and Table 2).

e. Fixed Fee – A fixed fee is calculated as a basis of total direct and indirect costs. The State of California allows a 10% maximum fee.

See Attachment D for Hypothetical Cost Estimate

G. Insurance requirements

Without limiting Fresno COG's right to obtain indemnification from the consultant or any third parties, the consultant, at its sole expense, shall maintain in full force and affect the following insurance policies throughout the term of the contract:

1. Comprehensive general liability insurance with coverage of not less than \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. Comprehensive general liability insurance policies shall name Fresno COG, its officers, agents, and employees, individually and collectively, as additional insured, but only insofar as the operations under the terms of the contract are concerned. Such coverage for additional insured shall apply as primary insurance or self-insurance and any other insurance, maintained by Fresno COG, its officers, agents, and employees, shall be given excess only and not contributing with insurance provided under the consultant's policies herein.
2. Comprehensive automobile liability insurance with limits for bodily injury of not less than \$25,000 per person, \$250,000 per accident, and for property damages of not less than \$50,000, or such coverage with a combined single limit of \$250,000.
3. Professional liability insurance of at least \$1,000,000.
4. Worker's compensation insurance as required by law.

This insurance shall not be canceled or changed without a minimum of thirty (30) days advance written notice given to Fresno COG. The consultant shall provide certification of said insurance to Fresno COG within twenty-one (21) days of the date of the execution of the contract. Such certification shall show, to Fresno COG's satisfaction, that such insurance coverages have been obtained and are in full force; that Fresno COG, its officers, agents, and employees will not be responsible for any premiums on the policies; that as and if required such insurance names Fresno COG, its officers agents, and employees individually and collectively as additional insured (comprehensive and general liability only), but only insofar as the operations under the contract are concerned; that such coverage for additional insured shall apply as primary insurance and any other insurance, or self insurance, maintained by Fresno COG, its officers, agents, and employees, shall be excess only and not contributing with insurance provided under the consultant's policies herein; and that this insurance shall not be canceled or changed without a minimum of thirty (days) advance, written notice given to Fresno COG.

In the event the consultant fails to keep in effect at all times insurance coverage as herein provided, Fresno COG may, in addition to other remedies it may have, suspend or terminate the contract upon the occurrence of such event.

H. Disadvantaged Business Enterprise (DBE) Certification

DBE Bidders Listing (Attachment B) must be completed for all contractors and subcontractors regardless of DBE affiliation.

The COFCG fully anticipates that it will consistently meet and exceed its adopted DBE overall goal under 49 CFR Part 26 using Race-neutral measures exclusively.

Only DBE firms currently certified per 49 CFR Part 26 will participate as DBEs in our program. Such certification must be issued by Caltrans, FHWA, FTA, DOT, MPO, City, County, or State in accordance with 49 CFR Part 26.

COFCG will not deny award to contractors on the basis of DBE participation, who demonstrate that they have used good faith efforts to achieve DBE participation. Contractors selected on the basis of DBE participation must provide the following information with the initial proposal or before entering into a contractual agreement with COFCG:

1. The names and addresses of the DBE firms.
2. A description of the work each DBE will provide.
3. The dollar amount of participation by each DBE.
4. Proof of DBE certification.
5. Written confirmation that the DBE will participate.
6. If DBE participation is not achieved, evidence of good faith efforts must be provided.

Prime contractors are required to maintain records and document payments to all subcontractors for three years following the performance of the contract. These records will be made available for inspection upon request by any authorized representative on COFCG, Caltrans, FHWA, or DOT. This reporting requirement also extends to any certified DBE subcontractor. The contractor shall maintain records showing the name and address of each subcontractor, the date of payment, and total dollar figure paid to each subcontractor.

COFCG will safeguard from disclosure to third parties information that may reasonably be regarded as confidential business information, consistent with federal, state, or local laws.

I. Conflicts of Interest

The prospective contractor shall disclose any financial, business, or other relationship with Fresno COG that may have an outcome on the selection.

J. Summary of Qualifications

Proposals shall include a summary of the firm's qualifications, including resumes of assigned staff.

K. Signing of Proposal/Authorization to Negotiate

The proposal shall be signed by an official authorized to bind the proposer and shall contain a statement to the effect that the proposal is a firm offer for a 90-day

period. The proposal shall also provide the following: name, title, address, and telephone number of individuals with authority to negotiate and contractually bind the company.

L. Attachments

Attachments to be included at the end of the proposal are as follows (as attached herein):

- Attachment A: Title VI Assurance
- Attachment B: DBE Participation
- Attachment C: Budget and Cost Breakdown

VII. PROPOSAL SUBMITTAL

A. Preparation of Proposal

The proposal shall be formatted in accordance with the requirements specified in *Section III: Proposal Requirements* of this RFP. Proposal forms shall be executed by an authorized signatory as described in *Section III-K: Signing of Proposal/Authorization to Negotiate*. All proposals shall be prepared by and at the expense of the proposer.

B. Examination of RFP Document

The proposer shall be solely responsible for examining, with appropriate care, the RFP, including any addenda issued during the proposal period. The proposer shall also be responsible for informing itself with respect to any and all conditions which may in any way affect the amount or nature of the proposal, or the performance of the work in the event the proposer is selected. Failure of the proposer to examine and inform itself in this manner shall be at the proposer's own risk and no relief for error or omission shall be given.

C. Submission of Proposal/Period of Acceptance

One reproducible master and seven copies of all proposals must be delivered to Fresno COG no later than **Friday September 30, 2009 by 5:00 P.M. Pacific Standard Time**. Proposals will not be accepted after 5:00 p.m. PST. Postmarks will not be accepted. Proposals should be delivered to:

Tom Webster
Council of Fresno County Governments
2035 Tulare Street, Suite 201
Fresno, CA 93721

All proposals will remain firm for a period of ninety (90) days following the final date for submission. All proposals will become the sole property of Fresno COG and a part of its official records without obligation on the part of Fresno COG.

This RFP is not to be construed as a contract of commitment on the part of Fresno COG. Fresno COG reserves the right to reject all proposals, to seek additional information from each proposer, or to issue another RFP, if deemed appropriate.

D. Modification or Withdrawal of Proposals

Any proposal received before the date and time specified above for receipt of proposals may be withdrawn or modified by written request of the proposer. To be considered, however, the modified proposal must be received by the proposal due date and time specified previously.

All verbal modifications to these conditions or provisions are ineffective for proposal evaluation purposes. Only written changes issued by proposers to Fresno COG are authorized and binding.

E. Rejection of Proposals

Failure to meet the requirements for the request for proposals will be cause for rejection of the proposal. Fresno COG may reject any proposal if it is conditional, incomplete, or contains irregularities or inordinately high cost rates. Fresno COG may waive an immaterial deviation in a proposal. Waiver of an immaterial deviation shall in no way modify the Request for Proposals document or excuse the proposer from full compliance with the contract requirements if the proposer is awarded the contract.

VIII. CONSULTANT SELECTION

All consultant proposals submitted in response to this request will be screened by a selection committee. The committee will determine, through the screening process, which consultants will be invited to make formal presentations and be interviewed by the committee. **The section committee reserves the right to make a final selection without an interview.**

The actual award of the contract will be by the Fresno COG Policy Board (tentatively set for the October, 2009 meeting). Proposal opening does not constitute the awarding of a contract. The contract is not in force until it is awarded by Fresno COG and executed by the Fresno COG designees.

IX. PROPOSER OBJECTIONS

A proposer may object to any of the terms or provisions set forth in the RFP's Scope of Work or to the selection of a particular proposer on the grounds that Fresno COG's procedures, the provisions of this RFP, or applicable provisions of federal, state, or local law have been violated or inaccurately or inappropriately applied by submitting Fresno

COG a written explanation of the basis for the objection. Deadlines for submittal of objections are:

- No later than two weeks prior to the date proposals are due, for objections to RFP provisions; or
- Within three working days after the date on which contract award is authorized or the date the proposer is notified that it was not selected, whichever is later, for objections to proposer selection.

If the proposer does not state any objections, Fresno COG will assume that the RFP scope of services are acceptable to the proposer and have been fully factored into its response. If the proposer intends to negotiate with Fresno COG concerning any part of the San Joaquin Valley Blueprint Roadmap scope of services that the proposer finds objectionable, the proposer must provide specific language in its response that will address or cure its objections.

X. FRESNO COG RIGHTS

Fresno COG may investigate the qualifications of any proposer under consideration, require confirmation of information furnished by a proposer, and require additional evidence of qualifications to perform the work described in this RFP.

Fresno COG reserves the right to:

1. Reject any or all of the proposals if it deems such action is in the public interest;
2. Issue subsequent Requests for Proposals;
3. Cancel the entire Request for Proposal;
4. Remedy technical errors in the Request for Proposals process;
5. Appoint an evaluation committee to review the proposals;
6. Seek the assistance of outside technical experts in proposal evaluation;
7. Approve or disapprove the use of particular subcontractors;
8. Establish a short list of proposers eligible for interviews after review of written proposals;
9. Negotiate with some, all, or none of the respondents to the RFP;
10. Solicit best and final offers from all or some of the proposers;
11. Award a contract to one or more proposers;
12. Accept an offer other than the lowest price offer; and
13. Waive informalities and irregularities in proposals and the bid process.

This RFP does not commit Fresno COG to enter into a contract, nor does it obligate Fresno COG to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. All proposals will be subject to public disclosure as required by the California Public Records Act.

Fresno COG reserves the right to investigate the qualifications of all firms under consideration to confirm any part of the information furnished by a proposer, or to require other evidence of managerial, financial, or other capabilities which are considered necessary for the successful performance of the contract.

XI. RFP QUESTIONS

All questions on the RFP should be submitted in writing by Friday, September 18, 2009 by 5:00 P.M. to:

Tom Webster
Council of Fresno County Governments
2035 Tulare Street, Suite 201
Fresno, CA 93721
twebster@fresnocog.org

All questions and answers will be posted on the Fresno COG website at:
www.fresnocog.org

Attachment A

TITLE VI ASSURANCE

The Council of Fresno County Governments, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d-4 and Title 49, Code of Federal Regulations, department of Transportation, Subtitle A, Office of the Secretary, Part 21 Nondiscrimination in Federally Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority businesses enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or nation origin in consideration of an award.

Attachment C

BUDGET AND COST SCHEDULE TEMPLATE

TASKS	(Name)		(Name)		(Name)		Total Task Hours	Total Task Cost
	(Role)		(Role)		(Role)			
	(Hourly Billing Rate)		(Hourly Billing Rate)		(Hourly Billing Rate)			
Task	Hours	Cost	Hours	Cost	Hours	Cost		
Tasks Subtotal								

DIRECT COSTS

Direct Cost		Amount
Direct Costs Subtotal		

SUBCONSULTANTS

Subconsultants		Total Cost
Subconsultants Subtotal		

PROPOSAL GRAND TOTAL		
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Council of Fresno County Governments

Attachment D

The hypothetical cost format example given below is to illustrate required components of the cost proposal only, and may have to be tailored to fit individual cost structures.

HYPOTHETICAL
COST ESTIMATE

Table 1.- Direct cost by Task

Cost Items	Task 1	Task 2	Task 3	Total
1. Direct Labor	3,700	17,053	5,502	26,255
2. Overhead (___% of Line 1)	1,480	6,821	2,201	10,502
Total Salary Burden	5,180	23,874	7,703	36,757
3. Direct Expenses				
Telephone/FAX	35	28	15	78
Postage/Shipping	12	8	35	55
Graphics/Printing	11	11	75	97
Travel	350		500	850
Misc.	45	45	45	135
Total Direct Expenses	453	92	670	1,215
4. Subconsultant Fees *	4,244	22,276	2,726	29,246
5. Fixed Fee (___% of Lines 1,2,3)	764	1,524	1,132	3,420
Total	10,640	47,766	12,231	70,638 70,638

Table 2 - Project Task Costs by Key Personnel

Task No. and Description	Key Staff #1	Key Staff #2	Staff Support	Total Hours
Task 1. Establish Parameters	25	75		100
Task 3. Data Collection and Analysis		400	250	650
Task 4. Final Report and Presentation	15	50	175	240
Total Hours	40	525	425	990
Billing Rate	\$75.00	\$44.06	\$25.00	
Memo Total	3,000	23,132	10,625	36,757

* Subconsultants must provide required cost components found in Tables 1 & 2