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OFFICE OF THE CITY CLERK
OAKLAND

2017 MAY 18 PM 1:00

AGENDA REPORT

TO: Sabrina B. Landreth
City Administrator

FROM: Ryan Russo
Director, DOT

SUBJECT: Bicycle Master Plan Update Contract

DATE: May 12, 2017

City Administrator Approval

Date:

5/17/17

RECOMMENDATION

Staff Recommends That The City Council Adopt A Resolution Authorizing The City Administrator Or Designee To Negotiate and Execute A Professional Services Contract For A Total Amount Not To Exceed Six Hundred Thousand Dollars (\$600,000.00) Including A Contingency Of Fifty-Five Thousand Dollars (\$55,000.00) With Alta Planning + Design For Professional Services of Planning, Engineering, And Environmental Review For the Bicycle Master Plan Update For A Term of Three (3) Years.

REASON FOR SUPPLEMENTAL

The purpose of this supplemental report is to provide additional information about the scope of work included in the Bicycle Master Plan Update Request for Proposals, clarification on the type of professional services request performed for the Bicycle Master Plan Update, and clarification on the negotiated scope of services, as requested at the April 11 and April 25, 2017 Public Works Committee meetings.

In August 2016, the City of Oakland issued a Request for Proposals (RFP) for professional services related to the Bicycle Master Plan Update. Within the RFP, the City included a draft scope of work (**Attachment A**). As standard practice with competitive RFPs, proposing consultant teams routinely provide recommendations for refinement, augmentation, and strategies for implementing the scope. Combined with team qualifications and relevant experience, these scope refinements provide insights on the strengths and weaknesses of the prime consultant, subconsultants, and overall team approach.

After selection panel interviews, the Alta Planning+Design team was determined to be the highest ranked team. Subject to additional negotiation, the selection panel recommended including the outreach and environmental strategies proposed by TransForm and Rincon Consulting, which were not part of Alta Planning+Design's original team. These teaming changes reflect mutual agreement between the City, the prime, and the subconsultants.

An updated Compliance Analysis has been performed based on this proposed team. The team includes 58.2% participation from a local business enterprise plus 26.9% participation from a small local business enterprise. Per Contracts & Compliance evaluation, the Alta Planning+Design team complies with the City's living wage, equal benefits, and other

Item: _____
Public Works Committee
May 23, 2017

contracting requirements (**Attachment B**). A final draft scope of professional services Alta Planning+Design is attached (**Attachment C**).

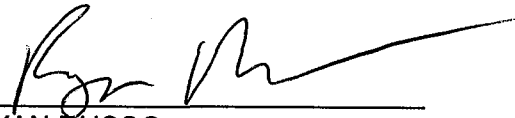
While the professional services request was published as a Request for Proposals, the original Compliance Analysis refers to a Request for Qualifications, a typographic error. This typographic error was repeated in the original agenda report.

ACTION REQUESTED OF THE CITY COUNCIL

Staff recommends that the City Council adopt a resolution authorizing the City Administrator or designee to negotiate and execute a professional services contract for a total amount not to exceed six hundred thousand dollars (\$600,000.00) including a contingency of fifty-five thousand dollars (\$55,000.00) for a total amount not to exceed six hundred thousand dollars (\$600,000.00) with Alta Planning + Design for professional services of planning, engineering, and environmental review for the Bicycle Master Plan Update for a term of three (3) years.

For questions regarding this report, please contact Sarah Fine, Senior Transportation Planner, at 510-238-6241.

Respectfully submitted,



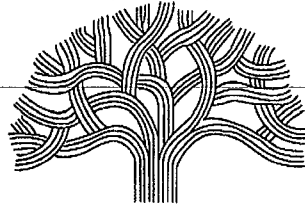
RYAN RUSSO
Director, Department of Transportation

Reviewed by:
Wladimir Wlassowsky, P.E.
Interim Assistant Director

Prepared by:
Sarah Fine, M.C.P.
Senior Transportation Planner

Attachments (3):

- A: *Request for Proposals for Bicycle Master Plan Update 2017*
- B: *Contracts & Compliance Unit Compliance Evaluation Schedule*
- C: *Draft Scope of Work – Alta Planning + Design Team*



City of Oakland

Sabrina B. Landreth, City Administrator

REQUEST FOR PROPOSALS

for

**PROJECT NO. C491220
Bicycle Master Plan Update**

Oakland Public Works Department (OPW)

Transportation Planning & Funding Division

250 Frank H. Ogawa Plaza, Suite 4344, Oakland, CA 94612

Telephone: (510) 238-6229

Project Manager: Iris Starr

August 2016

Attachment A

TABLE OF CONTENTS

Article		
I	Project Information	
	Request for Proposals Notice	1
	Introduction	3
	Scope of Services	4
II	Submittal Requirements.....	19
III	Selection Process	
	Review of Proposals	23
	Interview of Short-Listed Firms	23
	Contract Negotiations	24
	Contract Award	24
IV	Policies and Programs.....	26
V	Appendices	37
	APPENDIX A: Required Documents	
	APPENDIX B: Sample Professional Agreement	
	APPENDIX C: Schedule Q – Professional Services Insurance Requirements	
	APPENDIX D: Supporting Documentation	

I. Project Information

CITY OF OAKLAND, CA
PUBLIC WORKS DEPARTMENT

**Request for Proposals (RFP) Notice for
PROJECT NO. C491220 - BICYCLE MASTER PLAN UPDATE 2016**

The City of Oakland seeks a transportation planning firm to update its Bicycle Master Plan. The Plan Update will also include the following key elements: a comprehensive update to the Plan’s vision, goals, and policies; documentation of existing conditions and current best practices; planning for a network of high-quality bikeways serving “all ages and abilities”; establishing a methodology for measuring the quality and connectivity of bikeways; and developing an action-oriented plan with performance measures for increasing bicyclist mode share, decreasing bicyclist crashes, and improving the quality of bikeways. This will be achieved through recommendations to streamline the project implementation process; development of a concise plan with a modular format that anticipates and facilitates future five-year updates of select sections; and potential project development for a set of priority projects.

Local Business Requirement: 50% L/SLBE participation. It is highly recommended that primes verify the LBE/ SLBE status of their subconsultants prior to submittal.

Contract Term and Amount: Eighteen (18) to twenty-four (24) months. The contract amount will be determined based on the proposals received and by finalizing the scope of work with the selected consultant.

Pre-Proposal Meeting: MANDATORY

10:00 AM, AUGUST 23, 2016, Broadway Conference Room, 4th Floor, 250 Frank H. Ogawa Plaza, Oakland, CA 94612.

Deadline for Questions: 2:00 PM, SEPTEMBER 8, 2016 by email to the Project Manager. Responses will be issued as an addendum no later than 2:00 PM, SEPTEMBER 16, 2016. It is the Consultant’s responsibility to ensure that the email has been received.

Proposals Due: 2:00 PM, SEPTEMBER 23, 2016. Proposals not received at the Reception Desk of 250 Frank H. Ogawa Plaza, Suite 4314, Oakland, CA 94612 by the deadline will be returned unopened.

Contact Information:

OPW Project Manager: Iris Starr at Istarr@oaklandnet.com or (510) 238-6229

OPW Contract Services: Calvin Hao at chao@oaklandnet.com or (510) 238-7395

Contract Compliance Officer: Vivian Inman at vinman@oaklandnet.com or (510) 238-6261

RFP Documents: RFP documents and Addenda are available digitally only and provided free of charge through two websites listed below. Separate Plan Holder lists are maintained by each site. The Summary of Proposals Received is posted only to CIPList.com.

1. iSupplier: Email iSupplier@oaklandnet.com with any questions.
<http://www2.oaklandnet.com/Government/o/CP/s/ContractingPurchasingOpportunities/index.htm>
2. CIPList.com: <http://ciplist.com/plans/?Oakland/city/9392>.

Important Disclaimers and AB 2036 Compliance:

It is the responsibility of each prospective bidder to download and print all bid documents, including any addenda, and to verify the completeness of their printed bid documents before submitting a bid. The City does not warrant, represent, or guarantee the accuracy or completeness of any bid documents and/or information retrieved from other sources. The City is not responsible for any loss or damage including, but not limited to, time, money, or goodwill arising from errors, inaccuracies or omissions in any bid documents and/or information obtained from other sources. It is each prospective bidder's responsibility to check these sites through to the close of bids for any applicable addenda or updates.

LaTonda Simmons, City Clerk and Clerk of the City Council

Publication date: AUGUST 12, 2016

INTRODUCTION

Background & Project Goals

Oakland's first Bicycle Master Plan was begun in 1994 and adopted in 1999 as part of the Land Use and Transportation Element of the City's General Plan. The Plan defined a policy vision and established a citywide bikeway network of bike paths, lanes, and routes. This Plan was reaffirmed by City Council in 2005, the same year that work began on a comprehensive update to the Plan. Completed in 2007, this update refined the bikeway network through a citywide feasibility analysis of street grades, street widths, roadway capacity, and bicycle/bus interactions. It added arterial bike routes and bike boulevards to Oakland's bikeway types. A methodology for the evaluation of road diet projects was codified with an accompanying programmatic Environmental Impact Report. The 2007 Plan was subsequently reaffirmed by City Council in 2012.

The Plan Update will include the following key elements:

- A comprehensive update to the Plan's vision, goals, and policies.
- Robust community engagement, response tracking and incorporation into the BMP.
- Documentation on existing conditions and current best practices.
- Planning for a network of high-quality bikeways to serve "all ages and abilities."
- Establishing a methodology for measuring the quality and connectivity of bikeways.
- Developing an action-oriented plan with performance measures for increasing bicyclist mode share, decreasing bicyclist crashes, and improving the quality of bikeways.

This Bicycle Master Plan (BMP) Update will add to the evolution of Oakland's bicycle planning by adding:

- Recommendations to streamline the project implementation and maintenance process.
- The development of a concise plan with a modular format that anticipates and facilitates future five-year updates of select sections.
- Optional tasks include design development for priority projects and work to improve Oakland's data management for bicycle facilities.

Schedule

Following the execution of a professional services agreement, the City anticipates a planning process of 12 to 18 months in length. It is anticipated that adoption of the plan will take approximately six months, resulting in an overall project duration of 18 to 24 months.

Budget

Submit the proposed fee in a sealed envelope that is separate from the proposal. The contract amount will be determined based on the proposals received and by finalizing the scope of work with the selected consultant. In developing a proposed fee, consider the following factors:

- The lack of City staff time will be a constraint on the successful completion of this scope. Identify a project manager who is highly capable of self-directed work and who has extensive experience with local government.
- Community engagement will be a substantial part of this process, and will require highly

skilled managers and facilitators that reflect the diversity of the Oakland communities.

- Consultants are encouraged to identify tasks as optional and to propose additional tasks in order to achieve the project goals.
-

Key Work Completed by Other Projects

In addition to the 2007 Bicycle Master Plan, this project will build upon the work of multiple concurrent efforts as described under “Supporting Documentation” (Appendix D). Bicycle-specific efforts include a methodology for evaluating road diets; a citywide Level of Traffic Stress (LTS) model for measuring roadway performance for bicyclists; a bikeway typology that classifies bikeway segments into three categories; a zone-based approach to bikeway planning; preliminary design guidelines for a network of family bikeways; a comprehensive overhaul to Oakland’s design details for bicycle facilities; an analysis of bicyclist-related claims and lawsuits; and a growing inventory of bicyclist counts. CEQA reform under Senate Bill 743 will have significant implications for the environmental clearance of the Bicycle Master Plan and for the projects proposed by the Plan. See Appendix D, Supporting Documentation, for detailed information on the status and content of these efforts.

SCOPE OF SERVICES

This project will use the City of Oakland’s 2007 Bicycle Master Plan as its starting point, preserving the basic structure of the document while making substantive changes to the content of specific sections. These changes are described below in a series of tasks. Note that Tasks 1 through 6 and their associated subtasks follow the chapter and section numbering of the 2007 Bicycle Master Plan. City staff will play a lead role in creating the content for certain subtasks noted below by “[City Staff to Lead]”. For these subtasks, City staff has already completed work or – for issues requiring in-depth local or internal knowledge – staff is uniquely qualified to do so. The consultant will provide review and comments on the subtasks led by City staff. Unless otherwise noted, all sections will receive basic editing to update and refresh their content to reflect existing conditions and best practices.

Task 0: Project Initiation and Management

Develop a shared understanding of the project, review available resources, and finalize the project scope. Meet with City staff to initiate work on the project. Propose mechanisms to ensure that the project is completed at a high level of quality, on time and on budget.

Task 1: Chapter 1 – Introduction and Executive Summary

The “Outreach & Public Engagement Strategy” described in Task 2 will establish a new vision as well as new goals and objectives for the Plan and become a key part of the executive summary. In addition to the 2007 Plan goals on Infrastructure, Education, and Coordination, Task 1 will consider a bicycle mode share goal based on historical data and the potential for increasing bicycle use in Oakland. The Plan’s objectives will focus on recommendations to become a Gold-level Bicycle Friendly Community, drawing upon the successes of peer cities. Oakland will be compared to other US cities through the data available from the American Community Survey

(US Census Bureau), *Bicycling and Walking in the United States Benchmarking Report* (Alliance for Biking & Walking), and the Bicycle Friendly Community Program (League of American Bicyclists).

1.1. *Goals and Objectives*

In addition to Goals and Objectives that will be suggested by community members in Task 2, the City has these specific goals:

- Add a bicycle mode share goal. The goal will be aspirational, but grounded in historical mode share data at the census tract level and research on the correlation between bicycle use, bikeway network development, and people's willingness to bicycle. The citywide mode share goal will be based on zone-specific targets for the zone-based bikeway planning described below.
- Include specific recommendations to become a Gold-level Bicycle Friendly Community. These recommendations will include engineering, education, encouragement, enforcement, and evaluation/planning. These recommendations will be derived from a comparison to peer cities with significant achievements (Minneapolis, Portland, San Francisco, Seattle, Vancouver, BC, and Washington, DC). It is anticipated that there will be five to ten short recommendations that will be written as the Plan's performance measures.
- Replace "Accomplishments to Date" with "Oakland in National Comparison," by summarizing the results from national comparative surveys. These will include but not be limited to the American Community Survey (US Census Bureau), *Bicycling and Walking in the United States Benchmarking Report* (Alliance for Biking & Walking), and the Bicycle Friendly Community Program (League of American Bicyclists).

1.2. *Benefits of Bicycling*

This section will be updated with the most recent and compelling facts on the benefits of bicycling to transportation, sustainability, public health, equity, and quality of life. A new subject area on economic development will be added.

1.3. *Executive Summary*

An executive summary contain Plan highlights in visually compelling page spreads that relate to a visual page spread at the beginning of each chapter. The first paragraphs of each chapter should serve as the executive summary for that chapter. The first page spread of each chapter will be formatted with those first paragraphs in a graphically compelling manner. The final Executive Summary should be designed in such a way that it can be published as a separate document if necessary.

Task 2: Chapter 2 - Existing Conditions

This task addresses bicycling rates based on data from the US Census Bureau, Oakland's bicyclist counts program, Bike Share, and local transit operators. It includes the development of a bicycle mode share figure that includes bicycle trips to transit (which is not captured by the US Census data). It also includes an analysis of the existing conditions that shape Oakland's potential for bicycling. Specifically it will include a resident survey to categorize Oakland's population into the four categories of cyclists initially defined by Roger Geller: Strong &

Fearless, Enthused & Confident, Interested but Concerned, and No Way No How. This survey will build upon the zone analysis described below in order to obtain statistically significant results for each of eight zones that will encompass Oakland. This task also includes an analysis of bicyclist-involved crashes. The detailed inventory of existing bicycle facilities is addressed in subsequent tasks. The discussion of "Transit Connections" will be expanded to include bike share as a transit system.

2.1 *[City Staff to Lead] Opportunities and Constraints*

This section will be revised by City staff to call out only those characteristics that uniquely shape bikeway planning in Oakland (e.g. Oakland's eight BART stations are an opportunity, whereas Oakland's hub-and-spoke street grid is a constraint).

2.2 *Who Rides Bicycles?*

This section will be replaced with the results of a citywide survey of residents and merchants classifying Oakland's population into the four categories of cyclists initially defined by Roger Geller. The analysis will take a zone-based approach in order to separate out the locational and topographic differences between neighborhoods. The survey will be statistically significant at the zone level. For budgeting purposes, assume that Oakland will be divided into eight zones.

2.3 *Bicycling Rates*

This section will be overhauled with data from the American Community Survey, the City's annual bicyclist counts program, and the California Household Travel Survey (if useful). Oakland's bicycle mode share data will be augmented by access data from Bike Share, BART, AC Transit, Capitol Corridor, and the Alameda/Oakland Ferry to establish a bicyclist mode share for Oakland that includes work trips linked to transit.

2.4 *Transit Connections*

This section will be revised as a standalone chapter on Bicycling and Transit. Going beyond "existing conditions", the chapter will proactively address Bike Share and E-bikes plus bicycle integration with transit for local, regional, and intercity travel. AC Transit established recommendations on 6/27/16.

2.5 *Bicyclist Collisions*

This analysis will be updated working from the existing format. A graph will be added to show annual crashes normalized by the number of bike commuters including all years for which data are available (probably beginning in 1995). Add an analysis of bicyclist crashes as a percentage of all crashes. Note that the schedule for completing the bicyclist crash analysis will be determined based on availability of current SWITRS data from the California Highway Patrol. This analysis may occur later in the project schedule in order to have relatively current data included in the final plan.

2.6 *Education, Encouragement, and Enforcement*

This section will be updated to reflect current conditions. It may be moved to an appendix in that the information quickly goes out of date. See the scope of work for the appendices for related topics that are required by the Alameda County Transportation Commission.

2.7 Community Outreach

This information will be updated and formatted in a manner that facilitates future five-year updates. The work specified in Task 3 and other opportunities that present themselves while updating this plan should be considered.

Task 3: New Chapter - Communications, Outreach, & Public Engagement Strategy

The project's communications and public engagement strategy is central to ensuring broad community participation in the Plan and ensuring a community-driven approach to define the Plan's vision, goals, objectives, policies, and recommended changes to the bikeway policies and network. The Plan will incorporate and empower insights from a diverse set of Oaklanders and community stakeholders through many possible channels that range in formality, tone, approach, and possible audiences. The consultant will develop and implementing a robust communications and outreach protocol that will *consider* the elements enumerated below. The consultant is encouraged to propose additional elements for conducting a dynamic and innovative process that engages Oakland's heterogeneous populations *beyond local advocacy groups*. The Plan will include a description of the protocols, types of interactions, and the recommendations and results of community engagement, responses, and feedback loops. A brief summary of approaches and results will be included in the Executive Summary of the Plan. The detailed results of engagement will be attached as an Appendix.

(A) Review of Previously Completed Outreach & Engagement (Required)

The plan will refer to the extensive outreach over the twenty years of bikeway planning in Oakland. Much is already known through the two previous citywide planning efforts, twenty years of monthly meetings by the City's Bicyclist and Pedestrian Advisory Commission (BPAC), 120 stakeholder meetings over the past 10 years, and 50 project-specific mailers that generated 2,000 responses. Documentation will be provided to the consultant for review.

(B) Project Media and Strategy (Required)

Develop and maintain at least a project website, email address, social media presence, external media hit tracker, and communications database of stakeholders. Other methods of outreach can be used or recommended (Twitter?). Building upon available City lists, the consultant team will develop a stakeholder list that is used throughout the outreach and engagement effort. The consultant will develop and implement a strategy for making the process and deliverables accessible in multiple languages and ADA compliant.

(C) Bicyclist & Pedestrian Advisory Commission (BPAC- required)

The City's BPAC will be closely involved and may be interested in creating an advisory committee to provide ongoing input on the project's deliverables. For budgeting purposes, assume one person to support City staff at eight committee meetings.

(D) Technical Advisory Committee (Staff Expertise- required)

Other agencies will be engaged through a Technical Advisory Committee and perform review of key deliverables and, if needed, through a limited number of meetings. For budgeting purposes, assume up to five TAC meetings, plus up to five additional meetings, each with an individual

agency or sub-Agency group.

(E) Special Meetings (Make suggestions)

City staff will work with the BPAC to host up to three special meetings to gather input from the interested public. For budgeting purposes, assume a level of effort typical for a community open house.

(F) Plan Roadshow (Make suggestions)

The Team will develop and implement a “plan roadshow,” engaging with a diverse set of neighborhood groups to present plan progress and seek feedback. The neighborhood groups can be identified from the communications database or other methods. Creative ideas for roadshows are encouraged. One example: Question Truck

(<https://www.barrfoundation.org/blog/a-transportation-plan-that-began-with-a-question>)

“Rather than host a series of traditional public meetings, Boston sought from the beginning to create interactive events and opportunities designed for people of different ages, abilities, languages, and transportation preferences to provide feedback”. The purposes of this and other engagement strategies are to get the input of populations that do not normally participate in this type of planning efforts.

(G) Resident / Merchant Survey (Make suggestions)

The resident and merchant survey described in Task 2.2 will provide broad input from a representative and statistically significant sample of Oaklanders. This subtask will gather existing conditions data that currently does not exist. The data will play a foundational role in the performance measurement, goal setting, and prioritization of improvements to the bikeway network. This subtask should be scheduled and resourced in light of its key role in planning the bikeway network.

(H) Bicycle Tours (Required)

Include three to five bicycle tours to engage members of the public (non-advocacy groups) and elected officials on existing conditions and proposed projects. The tours should be structured to gather specific input on bikeway types, network gaps, and bikeway routing.

(I) One-on-One Listening Sessions (Required)

Identify five to seven community leaders, representing a range of interests such as public health, neighborhood associations, schools, police, business, tourism, etc. Set up 30-minute interviews with them to discuss biking in Oakland, what they’re excited about and what they’d like to see that is different. Take their portraits (if the leader consents), and include these portraits and interview quotes within the Plan. Reconnect with them to disseminate info about the plan with their friends/colleagues/networks when need arises.

(J) Interactive Web Map and Tools (Required)

Develop an interactive web map and tool that enables the public to comment on specific locations and areas. Use the interface to help communicate the City’s constraints to the public, thereby soliciting more meaningful comments. Key constraints include available right-of-way width, parking politics, staffing levels, and funding. As has been done with participatory

budgeting tools, the goal is to solicit input from the public while educating the public on difficult tradeoffs. This map may be able to be built off of existing resources.

*(K) Interim Report to BPAC, Planning Commission, Public Works Committee, and City Council
(Required)*

An interim (informational) report will need to be made to the final approving bodies. This report will include summaries of actions to date, policy proposals, and mapping. It is anticipated that the consultant will prepare presentations and meeting materials.

(L) Formal Adoption (Required)

The formal adoption will include meetings at the BPAC, Planning Commission, Public Works Committee, and City Council which will require associated staff reports, resolutions, and ordinances. It is anticipated that the consultant will prepare presentations and meeting materials while staff will prepare staff reports.

(M) Recommendations for Ongoing Outreach and Engagement (Make suggestions)

Using the lessons learned from the Plan's outreach and engagement process and that from other cities, make recommendations for continuing engagement following Plan adoption. (Established efforts include the "I [bike] Oakland" brand, an extensive web presence (www.oaklandbikes.info, www.oaklandbikemaps.info), contacts database (2,800 records), biannual newsletters published in four languages, annual bikeways maps, project-specific outreach mailers, a bicycle tour, and schwag distributed through Bike to Work Day, PedalFest, and community meetings). The recommendations will need to draw from national best practices and identify staffing needs to sustain these practices.

The Policy Recommendations from the 2007 Bicycle Master Plan will be comprehensively revised in response to feedback gathered through this Outreach & Public Engagement Strategy. New policies will be added to address Bike Share and other related new modes.

Task 4: Chapter 3 – Policy Recommendations

3.1. Related Federal, State, and Local Policies

This section will be deleted in its entirety.

3.2. Bicycle Master Plan Policies

The consultant will review the 2007 policies and provide recommendations based on national best practices and community input. The consultant will also organize and facilitate one or more internal City focus groups on how Bicycle Master Plan policies could be improved to encourage better outcomes through private development. The focus group(s) will query case planners from the Planning & Building Department, staff in Economic Development, Public Works maintenance, and engineers in the Bureau of Engineering and Construction who review modifications to the public right-of-way by private development ("p-jobs"). The resulting information will be used to shape BMP policies as needed and by City staff to help streamline internal project review.

3.3. *Issues for Further Discussion*

This section will be deleted in its entirety. The bikeway guide signage issue was resolved by a standalone process following Plan adoption. It is anticipated that mountain biking will not be addressed by the Plan update. As a parks and open space issue, mountain biking happens within a regulatory and stakeholder context that is significantly different than transportation in the public right-of-way.

Task 5: Chapter 4 – Bikeways

The proposed bikeway network will be revised in two respects. First, the alignment of bikeways may be modified through refinements to particular corridors or through the addition or deletion of corridors. This process will be based on the Task 3 community input plus the information developed and lessons learned since the 2007 Plan. Second, the type of proposed bikeways will be revised by applying a street typology of primary, secondary, and tertiary bikeways. This new approach will focus on the quality of bikeway connections and include an “all ages and abilities” network. The bikeway typology will use the level of traffic stress (LTS) methodology to measure performance and determine the proposed bikeway types.

4.1. *[City Staff to Lead] Bikeway Types*

City staff will rewrite this section to present the types of bikeways with respect to the types of bicyclists as established in the Existing Conditions chapter. A definition of protected bike lanes and any other new bicycle facilities will be added. The typology of primary, secondary, and tertiary bikeways will be explained with the respect to the streets typology developed for the City’s Complete Streets General Plan Amendment.

4.2. *Proposed Bikeway Network*

- [City Staff to Lead] Network Criteria: City staff will rewrite the network criteria. The consultant will complete best practices research to inform staff’s work. The consultant will also review and comment on draft work products.
- Reach and Coverage: The consultant will analyze the reach and coverage of the proposed network in two ways. First, what percentage of the Oakland population is within one-quarter mile of the primary, secondary, and tertiary bikeway networks? Second, what percentage of the Oakland population has access to the primary bikeway network via streets of LTS 1? Similarly, what percentage of the Oakland population has access to the secondary network and tertiary network via streets of LTS 2 and LTS 3, respectively?
- Network Revisions: The consultant will work with City staff to identify and evaluate a set of possible changes in the alignment of the bikeway network. For budgeting purposes, assume the overall network will change by approximately 35 miles (15% of the total network). See the Supplemental Documentation on possible network changes that have been identified since the adoption of the 2007 Plan. Proposed network changes will include those ideas gathered in the public engagement process. Network changes initiated by staff and the consultant team will be vetted through the public engagement process.
- Citywide Feasibility Analysis: Using the 2007 analysis as a baseline, the project team will evaluate possible changes to the methodology for the capacity analysis and the

bicycle/bus interactions. The capacity analysis will be augmented to include performance measures for bicycle boulevards. The street grade analysis will remain as is and be applied to network changes as needed. Then the capacity analysis and the street width analysis will be applied to select corridors with the goal of identifying five years of priority projects that are determined to be feasible in this five year timeframe. Note that priority projects will be identified through the prioritization criteria described below and then screened through the citywide feasibility analysis. It is anticipated that there will be conflict between protected bike lane proposals and the City's Fire Department clearance requirements. This conflict may require the consultant to develop and evaluate policy alternatives. The cross-sections in the 2007 Plan will be revised and moved to a separate document that can be updated by staff.

4.3. *Safe Routes to Transit*

The bikeways named by the Safe Routes to Transit policy will be updated and mapped as two-mile extensions from each transit station. The consultant will use the citywide LTS model to evaluate the catchment for each station at LTS 2 or higher in order to identify deficiencies and opportunities.

4.4. *Existing Bikeways*

This section will be deleted and replaced with a brief summary in the chapter's introduction. It will refer to the City's time lapse map and associated data on the development of Oakland's bikeway network from 1976 to the present. See the scope of work in the appendices for a discussion of the ACTC requirement on reporting bicycle facility expenditures.

4.5. *Bikeway Design Guidelines*

This subtask will identify any new bicycle-related design guidance that should be incorporated into the Complete Streets Design Guidelines. Design guidelines will not be included in this Plan.

Task 6: Chapter 5 – Parking and Support Facilities

The primary effort associated with this chapter is a review of Oakland's bicycle parking ordinance with respect to national best practices. This evaluation will solicit input from developers and the City's case planners who process development applications. The task will also analyze the feasibility of requiring that bicycles be allowed in office buildings (as in San Francisco). The task includes working with BART to prioritize bicycle parking improvements at BART stations. The chapter will also address the siting and spatial requirements of bike corrals, bike repair and parking stations, and shared mobility hubs.

5.1. *[City Staff to Lead] Facility Types*

This section will be refreshed by City staff. Bicycle corrals and other new facility types will be added as needed.

5.2. *[City Staff to Lead] Existing and Proposed Facilities*

This section will be refreshed by City staff. It primarily will refer to the City's web map for existing facilities. Language will be added to note the City's by-request programs for bicycle racks and bicycle corrals. The consultant will engage BART to identify and prioritize Oakland's

BART stations for bike stations, including expansions to existing bike stations.

5.3. Bicycle Parking Ordinance

Review the City's bicycle parking requirements that are part of the Oakland Planning Code. Compare to national best practices and make recommendations for improvements. In particular, consider increasing the long-term bicycle parking requirements for residential development and the short-term requirements for retail/commercial uses. Consider the practicality and effectiveness of a zone-based approach to bicycle parking requirements. Evaluate and, if determined to be beneficial, propose a policy to require that bicycles be allowed in office buildings. For budgeting purposes, assume the following: Oakland's requirements will be compared to those of the six peer cities (Minneapolis, Portland, San Francisco, Seattle, Vancouver, BC, and Washington, DC). The appropriateness and the effectiveness of the current requirements will be investigated through (a) a focus group with the City's case planners; (b) a focus group with affordable housing developers – possibly facilitated by East Bay Housing Organizations (EBHO); and (c) in up to eight telephone interviews with other developers recommended by the City's case planners. These actions are separate from Task 3 efforts.

5.4. [City Staff to Lead] Parking Design Guidelines

This section will be deleted in its entirety. City staff will initiate a separate process to overhaul the City's bicycle parking design guidelines for the public right-of-way. The consultant will develop design guidance for the construction of long-term bicycle parking; however, the guidelines will not be included in the plan itself.

Task 7: Chapter 6 – Implementation

The Implementation chapter will be revised to reflect changes in the bikeway network and revisions to the project prioritization criteria to develop a current list of priority projects. Priority programs will be identified for the facilities, education, encouragement, and enforcement that are needed to achieve Gold-level recognition from the League of American Bicyclists. Priorities will be informed by and vetted through the public engagement process (Chapter 3). Opportunities to streamline bikeway implementation will be developed through a workflow audit of how bikeways are currently developed. Bikeway cost estimates will be developed by bikeway type on a per mile basis, which will include the lifecycle cost of maintenance. These costs will be applied to the proposed projects along with roadway paving costs based on the City's inventory of current pavement conditions. The bikeway cost estimating will identify which proposed bikeways are and are not part of the City's Five Year Paving Plan. An organizational analysis will be completed that compares Oakland's capacity for delivering bicycle projects to that of peer cities.

6.1. Priority Bikeway Projects

Working with the consultant, City staff will revise the criteria for project prioritization. (See the draft included in Appendix D, Supporting Documentation.) The current prioritization scheme was last updated in 2015 and includes approximately 100 projects. The consultant will review the projects from the 2007 Bicycle Master Plan and make recommendations on changes to the geographic extent of particular projects. The consultant will then apply the prioritization criteria

to the revised projects. In order to compare similar projects, the prioritization scheme will use three categories of project types, similar to what is described in Section 6.3 of the 2007 Bicycle Master Plan. The resulting list of prioritized projects will be formatted separately from the Bicycle Master Plan such that it can be updated by City staff as projects are completed.

6.2. Priority Parking and Programs

This section will be renamed “Priority Implementation Programs” and it will consist of three categories of work. First, the section will make recommendations to improve the ongoing programmatic work on facilities: striping, signage, parking, traffic signals, and hazard elimination (including issues with pavement, storm drain inlets, and railroad crossings). Second, it will make recommendations to improve monitoring and evaluation, including Oakland’s annual bicyclist counts program. Third, it will identify the key work areas in various City departments on education, encouragement, and enforcement in order to achieve Gold-level recognition from the League of American Bicyclists.

6.3. [City Staff to Lead] Project Implementation

City staff will write this section based on the outcomes of an internal discussion to simplify and streamline the bikeway implementation process. Key areas for simplification are AC Transit coordination, community engagement, and City Council approval of (especially road diet) projects.

6.4. Other Roadway and Development Projects

This section will be deleted with a corresponding increase in emphasis in the policy chapter to address development projects.

6.5. Capital Funding

Generalized costs will be developed on a per mile basis for the discrete set of cross-sections proposed by the plan. These costs will be applied to the priority projects along with an additional column for pavement rehabilitation. These costs will be assembled based on the methodologies and data of the City’s Paving Program, drawing upon the Pavement Condition Index (PCI) rating and standard treatment costs (preventive maintenance, overlay, reconstruction). This effort will also identify which priority bikeway projects are and are not on the City’s Five Year Paving Plan. The section on Funding Sources will be deleted and replaced by a brief analysis of revenue streams (Measure B/BB, TDA Article 3, TFCA) to compute the outstanding financial need for a five year implementation plan.

6.6. Staffing for Project Design, Delivery, and Public Participation

This section will be deleted from the plan. The consultant will prepare a memo that compares Oakland’s organizational capacity for delivering bicycle facilities to the six peer cities (Minneapolis, Portland, San Francisco, Seattle, Vancouver, BC, and Washington, DC). The comparison will address organizational structure, staffing levels, and bicycle funding with respect to the city’s population, land area, and budget. The consultant will use this memo as a basis for calculating the staff costs needed to implement the five-year priority project list.

Task 8: Appendices & Implementation Guidelines

The Bicycle Master Plan will have associated Appendices and Implementation Guidelines for the following two purposes. First, the appendices will be used to satisfy the requirements of the State's Active Transportation Program (ATP) and ACTC's master funding agreement while keeping the Plan concise and focused on the topics most important to Oakland. The Appendices will be adopted as part of the Plan. Second, the Implementation Guidelines will not be adopted as part of the Plan so that staff can maintain and refresh the details of content without requiring City Council approvals and General Plan amendments. This content includes the detailed evaluation of the bikeway network and project prioritization as well as the methodologies for feasibility studies.

(A) Caltrans BTA Requirements

Appendix A will be updated to reflect the Bicycle Master Plan requirements of the State's Active Transportation Program (ATP) and by ACTC's master funding agreements with local jurisdictions. In addition to providing an inventory of how Oakland's plan satisfies these requirements, the appendix will include the content of various required sections that do not fit into the narrative structure of the chapters detailed above. See Appendix D, Supporting Documentation, for ACTC's requirements.

(B) [City Staff to Lead] Building on the 1999 Bicycle Master Plan

Appendix B will be moved out of the plan. It will be updated as a standalone document to memorialize progress to date and to explain the historical development of bikeway planning in Oakland.

(C) Local and Regional Coordination

Appendix C will be eliminated as a separate appendix. Note that a concise version of some of this content will be required to fulfill the requirements noted in Appendix A.

(D) Oakland General Plan Policies

Appendix D will be eliminated.

(E) Oakland Municipal Code

Appendix E will be eliminated from the Bicycle Master Plan. However, the consultant will recommend bicycle-related changes to the OMC that will be adopted by ordinance at the same time as adoption of the Bicycle Master Plan. Topics to address include the definition of "Bicycle", the prohibition of bicycles on sidewalks, the prohibition of bicycles in the Caldecott Tunnel, the operation of bicycles in parkland, and the requirement for bicycle licenses.

(F) Bikeway Descriptions

Appendix F will be revised to reflect the current state of existing and proposed bikeways. The primary purpose of this appendix is to comply with ATP and ACTC requirements.

(G) Requirements for Bikeway Feasibility Studies

Appendix G will be eliminated from the Bicycle Master Plan. A new methodology is being developed by the SC-TAP Bikeway Network 2.0 project and this will be codified but not adopted by City staff in the Implementation Guidelines.

(H) Supplementary Documentation

Appendix H will be eliminated from the Bicycle Master Plan. The content will be included in the Implementation Guidelines (which are not adopted as part of the Plan) and made available to the public.

Task 9: Environmental Analysis/Document

At this time there is uncertainty on the type of environmental analysis/document that will accompany the City Council's adoption of the Bicycle Master Plan. This is primarily due to California State Senate Bill 743 which, once implemented, will prohibit the use of Level of Service (LOS) in environmental review under the California Environmental Quality Act (CEQA). This task assumes that this reform will be implemented in 2016, allowing for the environmental determination for the Bicycle Master Plan to occur at a later date and under a new paradigm. In their proposals, consultants are encouraged to describe possible alternatives and recommend a preferred alternative.

For purposes of scope, budget, and schedule, this task conservatively assumes the preparation of a new Environmental Impact Report (EIR). In their proposals, consultants are encouraged to propose other alternative strategies for CEQA compliance for both adoption and implementation of the Bicycle Master Plan. Possible alternative strategies include without limitation: (a) using the exemption provided by California State Assembly Bill 417 (Public Resources Code 21080.20 and 21080.20.5); (b) preparing an addendum to the previously certified 2007 Bicycle Master Plan EIR; and/or (c) preparing a Supplemental/Subsequent EIR to the 2007 EIR. The overall need is twofold. First, an environmental analysis/document is needed for adoption of the Bicycle Master Plan. Second, the City seeks an efficient mechanism for the environmental clearance of future individual, implementing projects beginning in 2018. (Note that California State Assembly Bill 2245 (Public Resources Code 21080.20.5) provides such a mechanism until its expiration on January 1, 2018.)

Please provide your analysis of the advantages/disadvantages of each alternative strategy, as well as a general estimate of time/budget and your recommendation as to appropriate CEQA approach.

If a new EIR is prepared, it will rely heavily on the 2007 EIR. The 2007 EIR is located at: <http://www2.oaklandnet.com/Government/o/PWA/o/EC/s/BicycleandPedestrianProgram/OAK024597>.

All source documents are available in Word format. The consultant would be tasked with reviewing/revising these documents as needed to produce the needed Notice of Preparation, Scoping Session Report (to the City Planning Commission), Draft EIR (including Notice of Availability), and Final EIR (including Notice of Availability), plus the associated administrative drafts (typically 3, plus a screencheck) and accompanying Planning Commission and City Council staff reports for City review/comment.

In contrast to the 2007 EIR, mitigations should be written in the terms of the “Standard Specifications for Public Works Construction” (“Greenbook”) and the City’s Special Provisions which contain modifications to the Greenbook. The Greenbook and the City’s Special Provisions are standards of the Public Works Department that are applied to all Public Works construction projects. In contrast, the City’s Standard Conditions of Approval (SCAs) are maintained by the Planning Department. The SCAs are routinely applied to development projects, but rarely applied to Public Works construction projects. In order for bicycle projects to be included in Public Works construction, the requirements placed upon bicycle projects must fall within the framework that regulates Public Works construction. Should the environmental review of the Bicycle Master Plan identify construction-related impacts that are not addressed by this framework, the consultant will propose modifications to the City’s Special Provisions. For additional information on this topic, see “Oakland BMP Standard Conditions of Approval Compared to GreenBook 2003 and Oakland’s Special Provisions” that is included under “Supporting Documentation” (Appendix D).

Aside the from the 2007 Bicycle Master Plan EIR, the following documents must be reviewed and considered in developing the proposed scope, budget, and schedule: (a) Oakland’s CEQA Thresholds of Significance (which may change later in 2016, based on the implementation of SB743); (b) Oakland’s Standard Conditions of Approval; and (c) Oakland’s Guidelines for Environmental Consultant Contracts. These documents are included under “Supporting Documentation” (Appendix D).

Task 10: Document Formatting

The overall content of the update will be formatted in three ways. First, the chapters of the Bicycle Master Plan will be formatted as both a print and web document. The first page of each chapter will be written and formatted as a visually interesting standalone page spread in order to assemble an executive summary that consists of the introductory chapter plus the first pages or excerpts of each subsequent chapter. Second, the appendices of the Bicycle Master Plan will be formatted only as an electronic document. Each chapter and appendix will have separate pagination so as to facilitate a partial update to the plan in the five years following plan adoption. Third, the Implementation Guidelines will include the living content that will be managed and updated by City staff on an ongoing basis. Most notably this will include the dynamic list of priority projects.

The source files for the 2007 Bicycle Master Plan are available in text, LaTeX, and LyX formats; the tables are available in Excel. It is anticipated that the Plan’s documents will be formatted in InDesign or another suitable application recommended by the consultant.

Task 11: Evaluation of Data Management

The consultant will provide an evaluation of the City’s data management practices for bicycle-related information including but not limited to bikeways, bicycle signage, bicycle parking, bicyclist counts, and as-builts. This evaluation will compare Oakland practices to best practices and make recommendations for improvements that can be compatible with other emerging City systems.

Task 12 (optional): Data Management & Analysis

This optional task may be included as a contingency for improving Oakland's bicycle-related data and the analysis of those data. Currently City staff has multiple projects underway to improve the available data and develop increasingly sophisticated analyses. The Bicycle Master Plan in Task 11 is likely to identify additional data shortcomings, recordkeeping deficiencies, and new analyses that would be beneficial to citywide planning. Under this task, examples of possible projects include improving the accuracy and functionality of Oakland's bikeway-related data; applying and extending the "Level of Traffic Stress" (LTS) model currently under development; and developing web-based dynamic maps to communicate data and analysis to the public.

12.1. Data Management

Reserve a contingency for improving the accuracy and functionality of Oakland's bikeway-related data. Specific tasks will be identified based on the LTS project that is currently underway. Note that Oakland's bikeway data is managed in an Access database with 900 records and 40 fields. In previous efforts, the associated GIS layer has been overhauled to conform to the City's streets layer and to develop network functionality.

12.2. LTS Analysis

The City is in the process of building a "Level of Traffic Stress" (LTS) model and will use it to begin analyzing Oakland's network. However, there is likely to be analyses that are beyond the current scope or that arise from the update to the Bicycle Master Plan. Examples may include testing network alternatives, project prioritization, and adding additional factors to the model (hills being the most obvious factor).

12.3. Web Map of Bikeways

The City has a Google map of bicycle facilities based on code that is becoming antiquated and in need of overhaul. The City's Information Technology Department is simultaneously moving towards ArcGIS Online, but the implementation is experiencing ongoing delays. In this possible subtask, the consultant would work with IT staff to pick a platform (Google Maps, ArcGIS Online, or other) and produce a web map based on the current version. See <http://www.oaklandbikemaps.info/facilities/>.

Task 13 (optional): Plan Implementation

This optional task may be included as a contingency to expedite plan implementation by completing the evaluation and design of priority projects. The particular projects will be selected based on the project prioritization developed for the Plan update. Types of possible projects include the following: implementation of traffic calming on bicycle boulevards; a demonstration project of innovative intersection treatments (two-stage turn boxes, bike boxes, and bicycle signal heads); development of temporary/pilot projects; road diet feasibility studies; project-specific outreach; and final design of priority bikeways.

It is anticipated that work could extend beyond the date of Bicycle Master Plan adoption and that the development of specific projects will be informed by the Plan's prioritization. However,

some projects may receive feasibility studies and preliminary design earlier such that those projects could be approved by City Council at the time of Bicycle Master Plan adoption. The following potential subtasks are listed in priority order.

13.1. Bicycle Boulevards

Develop and conduct the community process for City-initiated traffic calming and complete final design based on the previously completed policy and pilot project recommendations for two corridors: Genoa St/52nd St (Stanford Ave to West St) and Webster St/Shafter Ave/Forest St/Colby St (MacArthur Blvd to Alcatraz Ave). See additional information provided under Appendix D, Supporting Documentation.

13.2. Intersection Treatments Demonstration Project

Based on a draft intersection list provided by City staff, develop recommendations to improve bicyclist safety and access at complex intersections using two-stage turn boxes, bike boxes, and bicycle signal heads. Complete final design for improvements at 20 intersections. See additional information provided under Appendix D, Supporting Documentation.

13.3. Road Diet and Corridor Feasibility Studies

Using the methodology developed by the Bikeway Network 2.0 project, complete feasibility studies for five to ten projects totaling five miles of roadway.

13.4. Project-specific Outreach

Prepare presentation materials, conduct two community meetings, and provide responses to comments for up to three of specific projects. For budgeting purposes, assume these projects will have a completed feasibility study (either by a separate task or separate effort) and that this effort will complete final design for the project.

13.5. Final Design of Priority Bikeways

Complete final striping and signage plans for five miles of roadway. Plans will be at 1":40' and formatted as 11"x17" sheets resulting in approximately five sheets per roadway mile. Plans must adhere to City's drafting style and layering convention. Provide submittals at 15% (face-of-curb, field verification of roadway widths, preliminary lane configuration), 35% (revised lane configuration, preliminary design of transitions), 65% (revised design of transitions, callouts), 90% (final draft design), 95% (constructability review), and 100% design.

II. Submittal Requirements

Submit five (5) bound copies of a fully responsive proposal by the deadline to:

OPW-Contract Services
250 Frank H. Ogawa Plaza, Suite 4314
Oakland, CA 94612

The proposal should be organized in the order in which the required elements are presented below. All pages shall be numbered starting from Item No. 3.

Elements to be included in the proposal are described below.

1. Transmittal or Cover Letter
 - a. Submit a Transmittal Letter addressed to Mr. Jason Patton, Project Manager, Transportation Planning & Funding Division.
 - b. Explain your team's approach to providing excellent service under the proposed contract and why you believe your team stands above the competition.
 - c. Signed by an officer of the prime firm and shall not exceed two pages. In the case of a joint venture or other joint-prime relationship, one officer of each prime must sign.

2. Acknowledgement of Addenda

If any addenda are issued, you must acknowledge your receipt of them either by including a statement in your transmittal letter or by returning signed addenda with the Proposal.

3. Project Team (Suggested Limit - 2 pages)

- a. Project Team must be able to demonstrate expertise, experience, and the ability to comprehensively handle the various types of projects and tasks described in the Article I, "Project Description" and "Scope of Services" of this RFP. Additionally, the Project Team must reflect compliance with the City's Local and Small Local Business Enterprise Program, and a true intent to utilize the listed sub-consultants. At a minimum, teams shall complete and submit **Schedule E** as a summary sheet showing your project team.
- b. List firm and sub-consultants with individual addresses, telephone numbers, and areas of expertise. Briefly describe the project responsibility of each team member. Identify which consultants are Local Business Enterprises (LBE) and Small Local Business Enterprise (SLBE). Additionally, for LBEs/SLBEs, submit a copy of current business license and date established in Oakland.

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- c. ~~The availability of the project manager, lead technical staff and technical support staff to commit to this contract should be numerically expressed as a percentage of work hours for that employee on a yearly basis.~~
-

4. Project Personnel (Suggested Limit - 3 pages)

- a. The principal-in-charge and/or the project manager shall be a full-time employee of the prime consultant for the project.
- b. At least one of the key project team members shall be a Professional Engineer (Traffic) currently licensed in the State of California.
- c. For sub-consultants, there are no professional licensing requirements.
- d. Provide an organizational chart of the project manager, lead technical staff and technical support staff. Staff who is proposed to contribute the majority of work hours should be highlighted.
- e. Provide summary Proposals of the project manager, lead technical staff and technical support staff. Staff Proposals should include a brief description of relevant experience in the project areas and services listed in this RFP, proposed role, length of work experience, and any areas of expertise. Resumes may be included as an appendix.

5. Relevant Experience – Prime Consultant and Sub-consultants (Suggested Limit – 4 pages)

- a. Describe experience in providing the various services listed in the scope of services for this RFP.
- b. Describe ability to work with City staff, community groups, and other stakeholders, and translating various requirements and interests into successful projects.
- c. Provide description of a maximum of an aggregate of five relevant projects recently completed by the staff proposed for all disciplines or areas (not a maximum of five relevant projects per discipline or per area of expertise). See Section IV.A requirements on work sample submittals. The description for each project should include the following information:
 1. Project name and location
 2. Project area and type
 3. Brief description of project
 4. Approximate cost of the project
 5. Month, year project commenced and completed
 6. Consultant's responsibility and scope of services
 7. Consultant's fee for the project
 8. Staff who worked on the project and their role

9. Client Agency's names, address, contact person and telephone number.

6. Project Management (Suggested Limit - 2 pages)

- a. Present approach to managing and maintaining quality control for large scale, multi-year planning projects. Indicate your understanding of the critical project elements, and what approaches your team took to manage these elements. Describe how you intend to interface with City staff.
- b. Provide availability of the project manager, lead technical staff and technical support staff. Availability should be numerically expressed.

7. References (Suggested Limit - 2 pages)

- a. Prime Consultant and Sub-Consultants: Three business related references, giving name, company, address, telephone number and business relationship to firm(s).
- b. Proposed Project Manager: Two business related references, giving name, company, address, telephone number and business relationship to project manager.

8. Hourly Billing Rates (Suggested Limit - 2 pages)

- a. Prime Consultant and Sub-Consultants shall provide a complete list of all staff hourly rates by position, i.e., Principal, Project Manager, Senior Engineer, Clerical, etc. Hourly rates shall be itemized and all-inclusive, i.e., base salary, fringe benefits, overhead, indirect cost surcharges, profit, etc.
- b. Mark-up on all reimbursable expenses, i.e. sub-consultant fee, printing, production costs, photography, equipment rental, mailing/postage, use of vehicle, software procurement, materials acquisition, etc., shall be individually negotiated and shall be subject to the City's approval, but may not in any case exceed 10%.
- c. The contract amount will be a maximum not-to-exceed amount. During the initial contract term, there is no provision for hourly rate increases/adjustments by the Prime Consultant or any Sub-Consultants. If an amendment to extend the contract expiration becomes necessary, hourly rate increases/adjustments will be permitted in accordance with the annual increase stipulated each July 1 by the City's Living Wage Ordinance (Chapter 2.28 of the Oakland Municipal Code).
- d. Hourly rates will not be a factor in the evaluation. However, the City reserves the right, after the firms have been selected, to decline to enter into a contract with a firm whose rates are deemed to be unreasonable at the City's sole discretion.

9. Documents due with Proposal (see APPENDIX)

The forms listed in this section are located in the Appendix, except Addenda, if any.

- Schedule E Consultant Team Listing
- Schedule E-2 Oakland Workforce Verification
(if applicable-see Section IV.10e)
- Schedule O Campaign Contribution Limits

III. Selection Process

REVIEW OF PROPOSALS

The proposals will be evaluated using the following criteria and scored as described below.

1. General Criteria: The City has allocated four (4) weeks for the review and scoring.
2. Specific Criteria: The following specific criteria and the points for each criteria, for a total of 100 points, will be used in evaluating and rating the proposals:
 - a. Presentation, completeness, clarity, organization, and conformance to the RFP content and format requirements. (15 Points Maximum)
 - b. Demonstrated ability based on firm experience and specific experience of the project manager and proposed team to complete the required scope of services in the RFP. (35 Points)
 - c. Prior experience and ability to work with City staff, a diverse array of business, community, advocacy groups and other stakeholders, and in translating various requirements and interests into an adopted Plan and implemented bikeway projects. (35 Points)
 - d. Availability and depth of experienced staff and resources to deliver quality products on schedule. (15 Points)
 - e. Additional preference points per Local/Small Local Business Enterprise Program: <http://www2.oaklandnet.com/oakca/groups/contracting/documents/form/oak029719.pdf>

Based on an evaluation, the City will develop a “short list” of firms to be considered for further evaluation, possibly including oral interviews. References, including past performance on City projects completed by the firms, if applicable, may be considered in the evaluation process.

INTERVIEW OF SHORT-LISTED FIRMS

If needed, oral interviews may be held with short-listed firms. The short-listed firms will be notified in writing whether interviews will be held and provided with information on the interview format. It is presently anticipated that the interviews will be conducted within ten (10) working days of notification.

The City reserves the right to select consultants based solely on the proposals and not conduct oral interviews. If oral interviews are held, the City will select consultants based on the

combined evaluation of the proposals and the interviews with proposals receiving two-thirds of the weight and interviews receiving one-third of the weight.

CONTRACT NEGOTIATIONS

1. The City reserves the right to negotiate the final scope of services and will not be bound by the scope of services presented in the RFP nor by the scope of services in the consultant's proposal.
2. In finalizing the scope of services, the City may request that the consultant add, delete, or replace subconsultants with those from other teams that submitted proposals. Such changes will be bound to the City's LBE/SLBE requirements.
3. The contract amount (including reimbursable expenses) will be a maximum not-to-exceed amount on the tasks described in Article I and the hourly rates submitted under Article II, or lesser rates mandated by the City. Reimbursable expenses are subject to prior approval of the City. The amount for such expenses will be included in the maximum not-to-exceed amount.

CONTRACT AWARD

1. Upon successful completion of the negotiations, a request by City staff to the City Council will be made to authorize the award of a Professional Services Agreement to the selected consulting firm.
2. Upon authorization to award the contract by the City Council and upon execution of the contract, the City shall issue an Authorization to Proceed to the selected consulting firms.
3. The selected consulting firm shall be required to maintain auditable records, documents, and papers for inspection by authorized local, state and federal representatives. Therefore, the consulting team may be required to undergo an evaluation to demonstrate that the firm uses recognized accounting and financial procedures.
4. Sample Professional Services Agreement
Consultants are advised to review the sample Professional Services Agreement. (See Appendices.) Consultants will be required to execute this agreement and the City is not inclined to make any modifications to its terms and conditions. Submittal of a proposal shall demonstrate the consultant's understanding and acceptance of the terms of the agreement.

5. Insurance Requirements

The awarded consultant will be required to provide proof of insurance in accordance with **Schedule Q** prior to execution of a contract. (see Appendices)

6. Business Tax Certificate

The consultant awarded this contract shall obtain or provide proof of having a current City of Oakland Business Tax Certificate prior to contract execution, and shall maintain a current tax certificate for the duration of the contract.

IV. Policies and Programs

Please carefully review all the terms and conditions described below. The City will award contracts only to firms that are in full compliance.

1. Definitions for this section:

- “consultant”, “prime consultant” and “proposer” are defined as a professional services consultant.

2. Pre-Proposal Meeting Information

MANDATORY attendance is stated in the Oakland Tribune newspaper legal ad and in the **Project Information** section of the RFP/RFQ. Topics to be discussed at the meeting may include, but are not limited to, project requirements and mandatory City policies and programs such as the Local/Small Local Business Enterprise Program, Disadvantaged Business Enterprise provisions, and living wage requirements. Prime Proposers failing to attend a MANDATORY pre-proposal meeting are disqualified from submitting a Proposal.

3. Proposal Documents and Addenda

Proposal Documents and Addenda are available digitally only and provided free of charge through two websites listed below. Hard copies are NOT available for purchase from the City. Courtesy notifications for Public Works Department contracting opportunities are only emailed to vendors registered in iSupplier and CIPList.com.

a. iSupplier System (City’s official site):

<http://www2.oaklandnet.com/Government/o/CP/s/ContractingPurchasingOpportunities/index.htm>

Registration in iSupplier, the City’s payment and procurement system, is required in order to receive a contract, payments and notifications of contracting opportunities. New registrants can email iSupplier@oaklandnet.com for registration instructions. Allow three working days for approval to access bid documents through iSupplier. Without proper registration, your firm may not be receiving notifications from iSupplier regarding contracting opportunities. We recommend updating your firm’s primary email contact regularly and confirming the “Products and Services” section of your profile is correctly filled out. For further information, refer to the following link for detailed iSupplier registration instructions.

<http://www2.oaklandnet.com/oakca1/groups/contracting/documents/webcontent/oak039337.pdf>

The iSupplier system assigns a unique “Request for Quotation” number solely used for reference or tracking within the iSupplier system. This number need not be referenced in your submittal.

b. CIPList.com (an alternate third-party site)

<http://ciplist.com/plans/?Oakland/city/9392>.

New registrants can register independently on the site for immediate access.

c. Please note that separate **Plan Holder lists** are maintained by each site.

4. Public Records Act or Sunshine Ordinance

Once a final award is made, all RFP responses become the property of the City. Label individual pages as "confidential" or "proprietary" information to indicate the desire to withhold financial and proprietary information.

Although a document labeled "confidential" or "proprietary", the information may still be subject to disclosure under the Public Records Act or Sunshine Ordinance, and is, at the City's discretion, based on the potential impact of the public's interest, whether or not to disclose "confidential" or "proprietary" information.

5. Rejection of Proposal Elements

The RFP does not commit the City to award an agreement or to pay any cost incurred in the preparation of the proposal. The City reserves the unqualified right to modify, suspend, or terminate at its sole discretion any and all aspects of the RFP and/or RFP process, to reject any or all proposals, whether or not minimum proposals are met, and to modify, postpone, or cancel the RFP without liability, obligation, or commitment to any party, firm, or organization. In addition, the City reserves the right to waive any defects as to form or content of the RFP or any responses by any consultant teams and to request and obtain additional information from any candidate submitting a proposal. **Furthermore, a proposal RISKS BEING REJECTED for any of the following reasons:**

- Proposal received after designated time and date.
- Proposal received at other than the designated location.
- Proposal not in compliance with the City of Oakland Local/Small Local Business Enterprise Program.
- Proposal not containing the required elements or exhibits, or not organized in the required format.
- Proposal containing excess or extraneous material not called for in the RFP.
- Proposal considered not fully responsive to this RFP.

6. Non-Discrimination/Equal Employment Practices

Consultant shall not discriminate or permit discrimination against any person or group of persons in any manner prohibited by federal, state or local laws. During the performance of this contract, Consultant agrees as follows:

- a. The consultant and its subconsultants shall not discriminate against any employee or applicant for employment because of age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC), or disability. This nondiscrimination policy shall include, but not be limited to, the following: employment, upgrading, failure to promote, demotion or transfer, recruitment advertising, layoffs, termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.
- b. The consultant and its subconsultants shall state in all solicitations or advertisements

for employees placed by or on behalf of the consultant that all qualified applicants will receive consideration for employment without regard to age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC) or disability.

- c. If applicable, the consultant will send to each labor union or representative of workers with whom consultant has a collective bargaining agreement or contract or understanding, a notice advising the labor union or workers' representative of consultant's commitments under this nondiscrimination clause and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
- d. All affirmative action efforts of contractors are subject to tracking by the City. The information or data shall be used for statistical purposes only. All consultants are required to provide data regarding the make-up of their subcontractors who will perform City contracts, including the race and gender of each employee and/or subcontractor and his or her job title or function and the methodology used by the contractor to hire and/or contract with the individual or entity in question.
- e. In the recruitment of subconsultants, the City requires all consultants to undertake nondiscriminatory and equal outreach efforts, which include outreach to minorities and women-owned businesses as well as other segments of Oakland's business community. The City Administrator will track the City's minority and women-owned business utilization to ensure the absence of unlawful discrimination on the basis of age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC), or disability.
- f. The City will immediately report evidence or instances of apparent discrimination in City contracts to the appropriate State and Federal agencies, and will take action against consultants who are found to be engaging in discriminatory acts or practices by an appropriate State or Federal agency or court of law, up to and including termination or debarment.

7. Violation Of Federal, State, City/Agency Laws, Programs Or Policies

The City may, in their sole discretion, consider violations of any programs and policies described or referenced in this section a material breach and may take enforcement action provided under the law, programs or policies, and/or terminate the contract, debar consultants from further contracts with City and/or take any other action or invoke any other remedy available under law or equity.

8. Conflict of Interest / Confidentiality

Consultant shall avoid all conflicts of interest and respect its relationship with the City by maintaining confidentiality of materials deemed confidential by law. Consultant specifically

agrees to the following:

- a. Consultant covenants that it presently has no interest, and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of services required under this project. Without limitation, the consultant represents to and agrees with the City that no conflict of interest is created between providing the City services hereunder and any interest consultant may have with respect to any other person or entity (including but not limited to any federal or state regulatory agency) which has any interest adverse or potentially adverse to the City.
- b. Consultant understands and agrees to successfully provide the services requested by the project. In addition, every communication between the consultant and the City or its special counsel shall be considered to be a confidential communication between client and lawyer (see California Evidence Code Section 952), and the confidential work product of the City Administrator, City Attorney and the City's special counsel, respectively, and therefore shall be held in strict confidence. All reports, analysis, maps, diagrams or any documents prepared or assisted in the preparation of or by the consultant, shall be considered to be prepared pursuant to said lawyer-client relationship. All of the above mentioned documents are also considered the work product of the City Administrator and shall not be communicated to any person except as specifically authorized in writing signed by the City Administrator and City Attorney.
- c. The Fair Political Practices Act and/or California Government Code Section 1090, among other statutes and regulations may prohibit the City from contracting with a service provider if the service provider or an employee, officer or director of the service providers' firm, or any immediate family of the preceding, or any subconsultant or consultant of the service provider, is serving as a public official, elected official, employee, board or commission member of the City who will award or influence the awarding of the contract or otherwise participate in the making of the contract. The making of a contract includes actions that are preliminary or preparatory to the selection of a consultant such as, but not limited to, involvement in the reasoning, planning and/or drafting of solicitations for bids and RFPs/RFQs, feasibility studies, master plans or preliminary discussions or negotiations.

9. Minimum Wage Ordinance

The City's Minimum Wage Ordinance went into effect on March 2, 2015 pursuant to the Oakland Municipal Ordinance Code Chapter 5.92. The Ordinance establishes a \$12.25 per hour minimum wage rate for calendar year 2015 (increasing to \$12.55 effective January 1, 2016), requires paid sick leave, and requires payment of service charges to hospitality workers.

Employers located in Oakland are subject to federal, state and local minimum wage laws. In

the event of conflicting requirements Oakland employers must follow the stricter requirement by paying the higher rate. Since Oakland's ordinance requires a higher minimum wage rate than do state and federal laws, all employers that have employees who perform work in Oakland who are subject to the laws must pay at least the City's minimum wage rate. For further information, please refer to:

<http://www2.oaklandnet.com/Government/o/CityAdministration/d/MinimumWage/OAK051451>

10. Local and Small Local Business Enterprise Program (L/SLBE)

This section has been modified for professional services agreements. The full program document is available at:

www2.oaklandnet.com/oakca1/groups/contracting/documents/form/oak029719.pdf

- a. **Requirement** – There is a 50% minimum participation requirement for all consultant agreements over \$50,000. Prime consultant/subconsultant status as an **Oakland certified local or small local business enterprise** are taken into account in the calculation.

The City has waived small local business enterprise (SLBE) subcontracting requirements for Oakland certified local business enterprises (LBEs) that apply for consultant agreements as the prime consultant. The SLBE requirements still applies for non-certified and non-local business enterprises.

- b. **Preference Points (for professional agreements only):** Proposers earn preference points based on the proposed level of participation prior to the award of a contract.
 - Two (2) preference points upon satisfying the minimum 50% requirement; and
 - Three (3) additional preference points may be earned at a rate of one (1) point per additional 10% participation, up to 80% participation of the total contract dollars spent with L/SLBE firms.
- c. For professional agreements only, proposers may earn up to five (5) preference points for local Oakland certified business participation and additional preference points for being a long term certified business in Oakland regardless of size and for having an Oakland workforce.
- d. For construction projects and professional agreements, in those instances where Very Small Local Business Enterprise (VSLBE) participation is evident, the level of participation will be double-counted towards meeting the requirement.
- e. For professional agreements only, additional preference points may be earned for having an Oakland resident workforce. Only prime consultants seeking additional preference points need to submit Schedule E-2, Oakland Workforce Verification form. Submit the form IN A SEALED ENVELOPE either with the Proposal submittal or within 4 business days after the Proposal due date and time.

-
- f. ~~The Exit Report and Affidavit (ERA) – This report declares the level of participation achieved and will be used to calculate banked credits. The prime consultant must complete the Schedule F, Exit Report and Affidavit for, and have it executed by, each L/SLBE sub consultant and submitted to the Office of the City Administrator, Contracts and Compliance Unit, along with a *copy* of the final progress payment application.~~
- g. Earning extra preference points for having an existing work force that includes Oakland residents is considered added value. The RFP/RFP consultant evaluation process allows for additional preference points over and above the number of points earned for technical expertise. Typically 100 points may be earned for the technical elements of the RFP/RFP. Preference points are awarded over and above the potential 100 points.
- h. Joint Venture and Mentor Protégé Agreements. If a prime consultant is able to develop a Joint Venture or “Mentor-Protégé” relationship with a certified LBE or SLBE, the Joint Venture or Mentor-Protégé partners will enjoy the benefit of credits against the participation requirement. In order to earn credit for Joint Venture or Mentor-Protégé relationships, the Agreement must be submitted for approval to the Office of the City Administrator, Department of Contracts and Compliance, prior to the project bid date for construction, and by Proposal due date for professional services. Joint Venture Applications and elements of City approved Mentor Protégé relation are available upon request.
- i. Consultants shall submit information concerning the ownership and workforce composition of their firm as well as its subconsultants, by completing **Schedule D, Ownership, Ethnicity, and Gender Questionnaire**.
- j. All affirmative action efforts of consultants are subject to tracking by the City. This information or data shall be used for statistical purposes only. All prime consultants are required to provide data regarding the make-up of their subconsultants and agents who will perform City contracts, including the race and gender of each employee and/or contractor and his or her job title or function and the methodology used by the consultant to hire and/or contract with the individual or entity in question.
- k. In the recruitment, hiring and retention of employees or subconsultants, the City of Oakland requires all prime consultants to undertake nondiscriminatory and equal outreach efforts, which include outreach to minorities and women-owned businesses as well as other segments of Oakland’s business community. The City Administrator will track the City’s MBE/WBE utilization to ensure the absence of unlawful discrimination on the basis of age, marital status, religion, gender, sexual preference, race, creed, color, national origin, Acquired-Immune Deficiency Syndrome (AIDS), AIDS-Related Complex (ARC) or disability.

I. The consultant shall complete the combined Schedule C-1, P, U, V - Declaration of Compliance with Americans with Disabilities Act, Nuclear Free Zone Disclosure, Compliance Commitment Agreement, and Affidavit of Non-Disciplinary or Investigatory Action.

11. Prompt Payment Ordinance OMC Section 2.06.070

The Ordinance requires that consultant and its subconsultants shall pay undisputed invoices of their subconsultants for goods and/or services within twenty (20) business days of submission of invoices, unless specific exemptions apply, or unless the Consultant or its subconsultants notify the City's Prompt Payment Liaison in writing within five (5) business days that there is a bona fide dispute between the consultant or its subconsultant and claimant. In this case the Consultant or its subconsultant may withhold the disputed amount but shall pay the undisputed amount.

Disputed payments are subject to investigation by the Liaison upon the filing of a compliant. Consultant or its subconsultants opposing payment shall provide security in the form of cash, certified check or bond to cover the disputed amount and penalty during the investigation. If Consultant or its subconsultant fails or refuses to deposit security, the City will withhold an amount sufficient to cover the claim from the next progress payment. The City, upon a determination that an undisputed invoice or payment is late, will release security deposits or withholds directly to claimants for valid claims.

Consultant and its subconsultants shall not be allowed to retain monies from subconsultant payments for goods as project retention, and are required to release subconsultant project retention in proportion to the subconsultant services rendered, for which payment is due and undisputed, within five (5) business days of payment. Consultant and its subconsultants shall be required to pass on to and pay subconsultants' mobilization fees within five (5) business days of being paid such fees by the City. For the purpose of posting on the City's website, consultant and its subconsultants, are required to file notice with the City of release of retention and payment of mobilization fees, within five (5) business days of such payment or release; and, consultants are required to file an affidavit, under penalty of perjury, that he or she has paid all subconsultants, within five (5) business days following receipt of payment from the City. The affidavit shall provide the names and address of all subconsultants and the amount paid to each.

Consultant and its subconsultants shall include the same or similar provisions as those set forth above in this section in any contract with a consultant or subconsultant that delivers goods and/or services pursuant to or in connection with a City of Oakland purchase contract.

Invoice and claim inquiries should be directed to Vivian Inman, City of Oakland Prompt Payment Liaison, 510-238-6261 or email vinman@oaklandnet.com.

All Schedules referenced below are not required with the proposal, except Schedules E and O. They will be provided during the contract execution phase to the awarded contractor.

Schedules E and O shall be submitted with the proposal. Schedule E-2 is optional. These Schedules, policies, programs, and ordinances referenced in this section are available at: <http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/s/FormsSchedules/index.htm>.

12. Arizona and Arizona-Based Businesses - Schedule B-1

In accordance with Resolution No. 82727 C.M.S., the consultant agrees that neither it nor any of its subsidiaries, affiliates or agents that will provide services under this agreement is currently headquartered in the State of Arizona, and shall not establish an Arizona business headquarters for the duration of this agreement with the City of Oakland or until Arizona rescinds SB 1070.

The consultant acknowledges its duty to notify Contracts and Compliance Division, Office of the City Administrator, if it's Business Entity or any of its subsidiaries affiliates or agents subsequently relocates its headquarters to the State of Arizona. Such relocation shall be a basis for termination of this contract or agreement.

13. Declaration of Compliance With the Americans With Disabilities Act – Schedule C-1

Private organizations that provide goods and services to the public have independent responsibilities under Title III of the Americans with Disabilities Act, regardless of their funding sources. This schedule provides a mechanism by which outside agencies acknowledge their general obligations under the ADA before providing goods or services to the City.

14. Ownership, Ethnicity and Gender Questionnaire – Schedule D

The consultant shall submit information concerning the ownership and workforce composition of its firm.

15. Project Consultant Team Listing – Schedule E

This preliminary project team shall reflect the prime consultant's understanding of the services required under this RFP or RFQ, and compliance with the City's Local and Small Local Business Enterprise Program. List the prime consultant and all sub-consultants along with the anticipated percentage of work distribution. Upon completion of contract negotiations, the awarded consultant shall update this project team and work distribution by submitting a final Schedule E upon request by the City.

16. Oakland Workforce Verification – Schedule E-2

Additional preference points may be earned for having an Oakland resident workforce. Only prime consultants seeking additional preference points need to submit Schedule E-2. Submit the completed form IN A SEALED ENVELOPE either with the Proposal submittal or

within 4 business days after the Proposal due date and time.

17. Pending Dispute Disclosure Policy - Schedule K

All entities are required to disclose pending disputes with the City of Oakland when they submit bids, Proposals or applications for a City or Agency contract or transaction involving:

- the purchase of products, construction, non-professional or professional services;
- contracts with concessionaires, facility or program operators or managers;
- contracts with project developers, including Disposition and Development Agreements, Lease Disposition and Development Agreements and other participation agreements;
- loans and grants; or
- acquisition, sale, lease or other conveyance of real property, excluding licenses for rights of entry or use of city facilities for a term less than thirty (30) consecutive calendar days.

The disclosure requirement applies to pending disputes on other City contracts or projects that: (1) have resulted in a claim or lawsuit against the City of Oakland, (2) could result in a new claim or new lawsuit against the City of Oakland, or 3) could result in a cross-complaint or any other action to make the City of Oakland a party to an existing lawsuit. "Claim" includes, but is not limited to, a pending administrative claim or a claim or demand for additional compensation.

Entities required to disclose under this Disclosure Policy include (1) any principal owner or partner, (2) any business entity with principal owners or partners that are owners or partners in a business entity, or any affiliate of such a business entity, that is involved in a pending dispute against the City of Oakland.

Failure to timely disclose pending disputes required by this policy may result in (1) a determination that a bid is non-responsive and non-responsible for price-based awards, or (2) non-consideration of a bid or Proposal for a professional service contract or other qualification-based award. The City may elect to terminate contracts with entities that failed to timely disclose pending disputes and/or initiate debarment proceedings against such entities.

18. Consultant Performance Evaluation – Schedule L1

At the end of the project, the City Project Manager will evaluate the consultant's performance in accordance with the Consultant Performance Evaluation form.

19. Consultant's Proposals - Schedule M, Part A

Consultant represents that:

- Consultant has the Proposals and skills necessary to perform the services under this contract in a competent and professional manner without the advice or direction of the City; and

- the services will be performed in accordance with the generally accepted principles and practices applicable to consultant's trade or profession; and
- Consultant and its employees and subconsultants are properly licensed, registered, and/or certified as may be required under any applicable federal, state and local laws, statutes, ordinances, rules and regulations relating to performance of the services; and
- all services provided pursuant to this contract shall comply with all applicable laws and regulations; and
- Consultant will promptly advise City of any change in the applicable laws, regulations, or other conditions that may affect City's program.
- This means Consultant is able to fulfill the requirements of this contract. Failure to perform all of the services required under this contract will constitute a material breach of the contract and may be cause for termination of the contract. Consultant has complete and sole discretion for the manner in which the work under this contract is performed.

20. The City's Living Wage Ordinance – Schedule N

Design-Build, Construction Manager At-Risk, or other professional contracts for public works of improvement that involve services of licensed professionals, such as, but not limited to, architects and engineers, are subject to Oakland's Living Wage Ordinance, Oakland Municipal Code, Title 2, Chapter 2.28, where such services amount to or exceed \$25,000. The ordinance requires that, unless specific exemptions apply or a waiver is granted, all employers contracted to provide services amounting to or exceeding \$25,000, shall provide certain minimum hourly wages and health benefits to employees. The City determines and adjusts the rates annually using the Bay Region Consumer Price Index as published by the Bureau of Labor Statistics, U.S. Department of Labor as the index. Prime consultants will be required to execute Schedule N during the contract execution process certifying their intent to comply with the Living Wage Ordinance for agreements equal to or greater than \$25,000.

21. Equal Benefits Ordinance - Schedule N-1

This contract is subject to the Equal Benefits Ordinance of Chapter 2.32 of the Oakland Municipal Code and its implementing regulations. The purpose of this Ordinance is to protect and further the public, health, safety, convenience, comfort, property and general welfare by requiring that public funds be expended in a manner so as to prohibit discrimination in the provision of employee benefits by City-hired consultants between employees with spouses and employees with domestic partners, and/or between domestic partners and spouses of such employees. (Ord. 12394 (part), 2001)

The following consultants are subject to the Equal Benefits Ordinance:

- Entities which enter into a "contract" with the City for an amount of twenty-five thousand dollars (\$25,000.00) or more for public works or improvements to be

performed, or for goods or services to be purchased or grants to be provided at the expense of the City or to be paid out of moneys deposited in the treasury or out of trust moneys under the control of or collected by the City; and

- Entities which enter into a "property contract" pursuant to Section 2.32.020(D) with the City in an amount of twenty-five thousand dollars (\$25,000.00) or more for the exclusive use of or occupancy (1) of real property owned or controlled by the city or (2) of real property owned by others for the city's use or occupancy, for a term exceeding twenty-nine (29) days in any calendar year.

The Ordinance shall only apply to those portions of a consultant's operations that:

- occur within the City; and
- on real property outside the City if the property is owned by the City or if the City has a right to occupy the property, and if the consultant's presence at that location is connected to a contract with the City; and
- elsewhere in the United States where work related to a City contract is being performed.

The requirements of this chapter shall not apply to subcontracts or subconsultants. For more information, see

http://library.municode.com/HTML/16308/level2/TIT2ADPE_CH2.32EQBEOR.html#TOPTITLE

22. City of Oakland Campaign Contribution Limits – Schedule O

This Agreement is subject to the City of Oakland Campaign Reform Act of Chapter 3.12 of the Oakland Municipal Code and its implementing regulations if it requires City Council approval. The Campaign Reform Act prohibits consultants that are doing business or seeking to do business with the City from making campaign contributions to Oakland candidates between commencement of negotiations and either 180 days after completion of, or termination of, contract negotiations. If this contract requires Council approval, the consultant must sign and date the Acknowledgment of Campaign Contribution Limits Form.

23. Nuclear Free Zone Disclosure - Schedule P

Consultant represents that consultant is in compliance with the City of Oakland's restrictions on doing business with service providers considered nuclear weapons makers.

24. Compliance Commitment Agreement – Schedule U

The Contractor shall comply with the L/SLBE program.

25. Affidavit of Non-Disciplinary or Investigatory Action – Schedule V

The Contractor shall certify that no disciplinary or investigatory action has been taken against its firm by the Equal Employment Opportunity Commission, Department of Fair Employment and Housing, or Office of Federal Contract Compliance Programs.

V. Appendices – see following pages

END OF RFP



INTER OFFICE MEMORANDUM

TO: Iris Starr, Capital Improvement Program Manager

FROM: Deborah Barnes, Director,
Contracts & Compliance

Deborah Barnes

SUBJECT: Compliance Analysis
RFP for Bicycle Master Plan Update 2016

DATE: May 2, 2017

On October 4, 2016, the City Administrator's Office, Contracts and Compliance Unit conducted a compliance review of four (4) proposals in response to the above referenced project. The initial review indicated that all four (4) firms were in compliance with the 50% Local and Small Local Business Program (L/SLBE) participation requirement.

The Public Works Agency negotiated with Alta Planning + Design for the project. On April 25, 2017, PWA requested another compliance analysis, to ensure that Alta Planning + Design were still in compliance with the L/SLBE Program requirements.

Below is the outcome of the most recent compliance evaluation of Alta Planning + Design for the minimum 50% Local and Small Local Business Enterprise (L/SLBE) participation requirement and Equal Benefits Ordinance (EBO).

Responsive to EBO and L/SLBE Policies		Proposed Participation					Earned Credits and Discounts			EBO Compliant? Y/N
Company Name	Original Bid Amount	Total LBE/SLBE	LBE	SLBE	*VSLBE	Total Credited participation	L/SLBE Participation Preference Points	Years in Oakland Preference Points	Oakland Workforce Preference Points	
Alta Planning + Design	NA	85.1%	58.2%	26.9%	0%	85.1%	5 points	2 pts.	1 pt.	N

Comments: Alta Planning + Design exceeded the minimum 50% L/SLBE participation requirement. The firm is not EBO compliant and will have to come into compliance prior to full contract execution.

Should you have any questions you may contact Vivian Inman, Contract Compliance Officer at (510) 238-6261.

Attachment B



CONTRACTS AND COMPLIANCE

Compliance Division

PROJECT COMPLIANCE EVALUATION FOR :

RE: **RFP for Bicycle Master Plan Update 2016**

CONSULTANT/CONTRACTOR: Alta Planning + Design

Engineer's Estimate:	Contractors' Bid Amount	Over/Under Engineer's Estimate
NA	NA	NA
Bid discounted amount:	Preference Points:	
N/A	5	

- 1. Did the 50% local/small local requirement apply: **YES**
- 2. Did the contractor meet the 50% requirement **YES**
 - a) % of LBE participation **58.20%**
 - b) % of SLBE participation **26.90%**
 - c) % of VSLBE participation **0.00%**
- 3. Did the contractor receive bid discount/preference points? **YES**
 (If yes, list the points received) **5 points**
- 4. Additional Comments.
- 5. Date evaluation completed and returned to Contract Admin./Initiating Dept.

5/2/2017

Date

Reviewing Officer:

[Signature]

Date: 5/2/2017

Approved By:

Shelley Darenburg

Date: 5/2/2017

LBE/SLBE Participation Alta Planning + Design

Project Name: RFP for Bicycle Master Plan Update 2016

Project No.: NA							Under/Over Engineers Estimate:				
Discipline	Prime & Subs	Location	Cert. Status	LBE	SLBE	VSLBE	Total LBE/SLBE %	Total Percentages	For Tracking Only		
									Ethn	MBE	WBE
PRIME Policy/Planning Environmental Documentation Survey Outreach	Alta Planning + Design	Oakland	CB	42.60%			42.60%	42.60%	C		
	Toole Design Group	Berkeley	UB					14.90%	C		14.90%
	Rincon Consultants	Oakland	CB	15.60%			15.60%	15.60%	C		
	EMC Research, Inc.	Oakland	CB		8.80%		8.80%	8.80%	C		8.80%
	TransForm	Oakland	CB		18.10%		18.10%	18.10%	C		18.10%
Project Totals				58.20%	26.90%	0.00%	85.10%	100.00%		0.00%	41.80%
Requirements: The 50% requirement can be satisfied by a combination of 25% LBE and 25% SLBE. The SLBE requirement is waived for Oakland certified prime consultants. An VSLBE's participation is double counted toward meeting the requirement.				LBE 25% or 50%	SLBE 25%	VSLBE	TOTAL LBE/SLBE 50%	TOTAL	Ethnicity AA = African American A = Asian C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed		
Legend LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise								UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise			

Task 1: Project Initiation and Management

Alta provides a strong, experienced project management team and maintains open lines to provide quality, cost, and schedule control. Throughout the planning process, Alta's Project Manager, Brett Hondorp will be in regular contact with the client's project manager to keep the client team apprised of the project effort and to seek input at key decision points.

At the outset of the project the Alta team will plan and facilitate a project kick-off meeting to confirm the scope and schedule, identify points of contact, and discussing key initial data needs. For ongoing project management we will set up regular check-in meetings via phone conference on a bi-weekly basis to keep the project on schedule, on budget, and continuing to meet expectations. Alta will prepare meeting minutes covering the discussion items and a list of follow-up tasks with the responsible party for each task, in a Status of Open Items (SOI) format. Alta will also provide monthly project status updates that will include budget and deliverable progress.

Task 1 Deliverables:

- Kick-Off Meeting Packet (Agenda, Schedules) and Meeting Notes
- Data/Planning Documents Needs Memo
- Bi-Weekly Conference Calls (Agenda and Call Notes)
- Monthly Progress Status Updates

Task 2: Outreach and Public Engagement

2.1 OUTREACH PLAN AND STRATEGY

As a first step the Alta team will work with City staff to lay out an overall outreach and public engagement strategy. The Public Outreach and Engagement Plan will identify key goals, project milestones, audience types, translation/interpretation needs, and communications tools, and then organize these concepts into a schedule of activities with roles and responsibilities for each task.

A key element of our outreach will be engaging with community leaders representing diverse neighborhoods, interest groups and constituencies throughout Oakland. Transform has deep contacts within many of Oakland's neighborhoods and community-based organizations, and will help to identify key community leaders for ongoing engagement, align our public outreach plan with other City efforts (i.e. Downtown Specific Plan, Social Equity Strategy, Resiliency Strategy, Department of Race and Equity).

The Alta team will review strategies and results of previous outreach efforts, including two previous citywide bicycle master plans, stakeholder and BPAC meetings, and project specific mailers and responses. Alta will seek to understand the geographic diversity of outreach efforts, major themes and issues raised by residents and businesses, and engagement strategies that generated the highest levels of participation. Communities that were not reached by initial efforts can be systematically identified and outreach efforts directed toward them through the following tasks.

The Public Outreach and Engagement Plan will be documented in a draft memo for review by the City.

2.2 AGENCY COORDINATION (BPAC AND TAC)

We assume OakDOT staff will be lead in attendance and presenting project updates at BPAC and TAC meetings. Alta can provide supporting material through our technical work, and we assume budget for an Alta team staff person to attend and support City staff at up to ten (10) meetings during the project.

2.3 COMMUNITY OUTREACH – WORKSHOPS AND LISTENING SESSIONS

Community Outreach Approach

TransForm will lead this task. TransForm will reach out to and partner with community leaders from underrepresented communities in East and West Oakland who have a demonstrated interest in transportation and land use planning, community development or resident empowerment to engage residents and community leaders in building agreement on the value of bicycling, the trade-offs of bicycle infrastructure, and the challenges and opportunities leading to the development of a safe bicycling network that residents and businesses can monitor and measure success in creating a safer, healthier, more cohesive and stable community.

The community outreach approach centers on partnerships with four “anchor” institutions – established community groups that have a trusted reputation in the low-income, mostly communities of color in East and West Oakland. Each anchor organization would spread the word regarding the Plan to its stakeholders/members, and mobilize community participation by hosting workshops in a location where residents are already accustomed to meeting. Community meetings for the Plan would coincide with or replace regularly scheduled meetings held by the anchor organizations. The anchor organizations would be responsible for logistics, with TransForm and the team responsible for meeting facilitation.

Examples of potential anchor institutions include the following groups:

- ACCE
- The Congress of Neighborhoods
- Oakland Sustainable Neighborhood Initiative Community Planners
- Causa Justa::Just Cause
- Youth Uprising, Communities for a Better Environment
- The Scraper Bikes
- Spanish Speaking Unity Council
- Spanish Speaking Citizens Foundation
- East Side Arts Alliance
- East Bay Asian Youth Center
- APEN
- Asian Health Services
- Bikes For Life
- Hard Knox Bike
- Bikery
- Yellow Jackets
- Red Bike and Green

TransForm will identify four anchor community institutions for implementation of outreach activities focused on the following geographic areas of the City:

- Deep East Oakland
- Fruitvale / San Antonio
- East Lake / Chinatown
- West Oakland / Downtown

Community Workshops

TransForm will partner with the anchor community institutions for each geographic area to host five rounds of community workshops (20 workshops total). For each workshop, food and childcare services will be provided. Translation services will be provided by Interpreters Unlimited, with languages identified by geographic area. Tentatively, translation services would be targeted as follows:

-
- Spanish – Fruitvale / San Antonio
 - Mandarin - East Lake / Chinatown
 - Cantonese - East Lake / Chinatown
 - Vietnamese - East Lake / Chinatown
 - Hmong - Deep East Oakland
-

The five rounds of workshops would be sequenced as follows. This format builds on each sequential workshop and ideally stakeholders participate in the whole series, but we understand that many participants may not be able to attend every workshop and would desire to encourage stakeholders to jump in at any point in the process. Each workshop will begin with a brief summary of what has been covered in prior workshops, so that new participants can feel quickly brought up to speed in the process. We have identified target time periods for each meeting, but will want to have flexibility to adjust these if we sense meeting fatigue is occurring or attendance is dropping.

Round 1 Workshops (tentatively targeted for Month 1-2)

- Hear community perspectives of bicycling, bicyclists, and bicycle infrastructure (pros / cons)
- Share goals of planning process and current plans and projects, and the work ahead, including community engagement plans
- Ask for ideas to help maximize community engagement, as well as get commitments for future participation or what will make future participation most likely.
- Discuss strategy for connecting to and engaging community members at a neighborhood level
- Present a range of tools (including those noted in the RFP scope as required) as options for engaging communities based on their interests and needs

Round 2 Workshops (tentatively targeted for Month 2-3)

- Respond to community perspectives of bicycling, bicyclists, and bicycle infrastructure. (At this meeting, the team will be prepared to present a response to gentrification concerns, and to discuss the economics of bicycling with case studies from other low-income, communities of color that are at risk for gentrification)
- Share proposed strategies to address concerns (potentially drawing upon work completed by Stephanie Pollack and Karen Chapple)
- Develop statement of agreed upon benefits and challenges of bicycling in Oakland
- Share Existing Conditions findings
- Give out "homework" assignments (1. Take at least one bicycle ride, including joining our tour!; 2. Have a conversation with at least one bicyclist who is NOT in this process yet; 3. Think about places that we should be making getting to easier by bicycle, and what it would take (i.e. protected bike lane, bike path, more bike parking, etc.).

Round 3 Workshops / Charrette #1 (tentatively targeted for Month 3-4)

- Create break-out groups (ideally no more than five people each) that will gather around maps of key corridors and key destinations for their community, and ask to mark-up maps with ideas for improved infrastructure based on their observations, conversations and bike riding experiences. Have maps scaled so marker tips equal the approximate width of bike lanes.
- Have each break out group present its map to the greater group
- The project team will provide recommendations and develop consensus on best vision
- Identify and vote for the top three bicycling infrastructure priorities in each community
- Make invitations to Charrette #2

Round 4 Workshops / Charrette #2 (tentatively targeted for Month 6)

- Present DRAFT Community Vision (based on Charrette #1), and describe challenges and opportunities, and or options

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- Break-out-into-groups-and-discuss-DRAFT-Community-Vision,-with-each-group-voting-on-options
 - Regroup and have groups share group agreements, disagreements over DRAFT
 - Vote on top three priorities for infrastructure within the geographic area
 - Vote on top three priorities for infrastructure elsewhere in the City
 - Make invitations to final workshop
-

Round 5 Workshops (tentatively targeted for Month 8):

- Present DRAFT Final, City-wide Bicycle Plan vision based on guidance from all four community areas
- Discuss input received from Round 4 voting on Community Vision options, and list outstanding concerns
- Discuss challenges and opportunities associated with implementation of the Plan
- Collect input on proposed indicators that community can monitor plan implementation and success for inclusion in Final Plan
- Listen and commit to ways community proposes to stay in touch with progress of the Plan, including preferred communication techniques and anticipated public presentations/progress updates to BPAC, Planning Commission, Public Works Committee and City Council

One-on-One Listening Sessions

TransForm will identify candidate community leaders. Suggestions will also be solicited from City staff and from representatives of the candidate anchor organizations. We recommend conducting these listening sessions early in the process to leverage community knowledge on specific neighborhood needs and to provide opportunities for community leaders to help identify relevant timing and locations for other events (like the mobile workshops).

2.4 COMMUNITY OUTREACH - MOBILE WORKSHOPS AND TOURS

Plan Roadshow (Mobile Workshops)

People live increasingly busy lives, and fewer people today have the opportunity to attend conventional public meetings. To make it easier for people to learn about and provide input to Alta will bring the project to the public. Alta will facilitate six (6) mobile workshops in places around Oakland where there is a concentration of Oaklanders that are simply out-and-about. The mobile workshops will each be held in different parts of the city to ensure a wide range of neighborhoods and residents have an opportunity to engage with the project, with input from Transform and the City. Locations could include setting up a booth at the Oakland Coliseum Flea Market, Grand Lake Farmers Market, Oakland First Fridays/Oakland Art Murmur, Laney Flea Market, or setting up outside a movie theater, in front of City Hall, or at neighborhood events. For example, First Thursday's on Grand Avenue, Third Thursday Piedmont Avenue Art Walk, and other local events provide excellent opportunities to engage with the public where they live, shop, and find entertainment. We will also support walk-in/bike-in information centers to learn about the BMP update at select branches of Oakland Public Libraries to be coordinated by OakDOT staff.

Bicycle Tours

Alta will lead up to four (4) bicycle tours each in a different part of Oakland and invite elected officials, TAC and BPAC members, City staff, and a limited number of community members to participate. We recommend tours in Deep East Oakland, Fruitvale / San Antonio, East Lake / Chinatown and West Oakland / Downtown. The routes will include stops to document and discuss existing conditions, brainstorm recommended improvements and visit locations where new facilities have already been planned or built. Alta will also use the Bicycle Tours as an opportunity to "calibrate" results from the Bicyclist User Type survey and Level of Traffic Stress analysis. By using a quick hand-raising poll of the group after riding through specific corridors, crossings, or intersections, Alta can link back to the survey results and further strengthen the conclusions of the visual preference survey about Level of Comfort on specific facility types. Alta will document input from each tour in a memo.

Website, Interactive Web Map and Tools

Alta will create and host a stand-alone project website to support basic project information (schedule, meeting and outreach dates, posting draft documents, etc.). We will also assist with creation of interactive web mapping and other tools to support the community outreach activities.

2.5 RIDER, RESIDENT, AND MERCHANT SURVEY

Resident Survey

EMC Research will develop a survey that will provide broad input from a representative and statistically significant sample of Oaklanders. The survey will include questions about:

- A visual preference survey of bicycle facility types (using photos from Oakland or simple sketch-up models) that are linked to Roger Geller's framework for bicyclist types. In Oakland, this approach will help us understand where residents fall on the spectrum of bicyclist types for the City as a whole and for individual neighborhoods, which will be useful for identifying appropriate infrastructure recommendations for relevant neighborhood,
- Preferred mode of travel for work and other purposes (shopping, school, entertainment),
- Identification of primary destinations. This will help with modeling potential changes in bicycle mode share.
- Areas of concern and preferences for types of investment.
- Demographic questions that will be necessary to ensure the survey findings are representative of the city overall and individual neighborhoods.

A standard approach to statistically representative surveying is to conduct random phone surveys; however the visual preference element of the "Type of Bicyclist" questions necessitates that the survey be presented with images. We recommend a mail-based approach that drives respondents to a website where they will be able to view images and complete the survey. This method allows us to start with a sample frame of all residential households in Oakland, and direct them to a visual survey format that allows us to show images of various types of bicycling facilities for respondent feedback. The goal will be to complete at least 800 surveys, with roughly 100 in each of the 8 to-be-identified zones in the City. The margin of error for the survey sample citywide will be plus or minus 3.5 percentage points, with a margin of error of plus or minus 9.8 percentage points in each of the eight zones. Final data will be weighted to reflect the actual population distribution of Oakland residents.

The survey questionnaire will be designed by EMC in consultation with Alta and the City. After an initial meeting with the project team, EMC Research will review relevant background information and develop a draft questionnaire for review. We typically proceed through multiple rounds of feedback and revisions to arrive at a final questionnaire that will meet the needs of the client. The survey will not proceed until all sides are satisfied with the questionnaire and it has been approved by the City.

The survey questionnaire is expected to take the average respondent approximately 15 minutes to complete online. While the final design will be heavily influenced by discussions with the client, we anticipate the survey will include key questions that allow us to categorize residents into the four cyclist types identified by Roger Geller, questions around current cycling behaviors, reactions to images of various types of cycling facilities, and a set of demographic questions.

The survey will be initiated by selecting a random selection of residential mailing addresses in the City of Oakland, and mailing a printed multi-lingual postcard with directions on how to access the survey online. The postcards would include a unique passcode for each household to protect against potential "ballot box stuffing" where the survey URL is passed around to non-selected households, as well as enable targeted follow-up for households in areas with low response rates. In addition to the initial invitation postcard, the budget given allows for one reminder postcard for non-responding households to boost response rates if needed.

The survey questionnaire will be professionally translated into Spanish and Chinese, and programmed and hosted by EMC. The respondent will be able to select the language of their choice when they begin the survey. The data collection process will be closely monitored by EMC staff to track the survey's representation and ensure that the sample universe accurately reflects Oakland's adult population. All demographic and geographic variables (such as age, ethnicity, and zip code) will be checked periodically to ensure that they are falling within the appropriate proportions as compared with the overall population.

Upon completion of interviewing, EMC Research staff will conduct an extensive statistical analysis of the data gathered from the survey. Key analysis steps will include single variable frequency analysis, variable modification to look for demographic and geographic patterns, bivariate frequency distribution analysis, regression analysis, and segmentation profile construction into the cycling categories defined by Roger Geller.

Once the data collection and analysis are complete, EMC will create a report on the findings of the survey. This report will contain key findings, analysis, and recommendations based on the survey research, including the Geller cyclist group analysis. Along with the report we will provide the survey topline (frequency responses for all questions with the full questionnaire document) and a full set of crosstabulations that show the survey responses among various demographic, geographic, and other groupings.

Merchant Survey

In addition to the resident survey, the Alta team will conduct focused outreach to local merchants (business owners and employees) through a targeted outreach effort that may include a survey and/or focus groups on merchant and employee needs related to bicycling, including routes and bike parking. This outreach will be an opportunity educate merchants on the economic benefits of bicycling and to relate information from the resident survey about mode of travel for shopping to provide a better understanding of the potential for increased bicycling mobility to support their businesses.

Rider Survey

Rider surveys will be conducted as part of bicycle tours, and using digital analytics tools developed as part of our outreach work. This information will inform cyclist demand and rider route preferences, as well as comfort and perceptions of safety.

Task 2 Deliverables:

- Community outreach strategy memo
- Presentation materials and written meeting summaries for each five rounds of workshops
- Meeting summaries (written notes and images) from listening sessions
- Six (6) mobile workshops
- Four (4) bicycle tours
- Resident survey questionnaire
- Surveys administered by mail in 8 city-defined zones to achieve 800 responses
- Survey results and analysis
- Focused outreach to merchants
- Digital bicyclist analytics

TASK 3: EXISTING CONDITIONS AND NEEDS

3.1 EXISTING GOALS AND POLICIES

Alta will review and compile existing city goals, policies and performance metrics supporting bicycle mobility and Complete Streets. It is assumed that this Plan Update will reference and expand upon these adopted goals, policies, and metrics. As part of this process our team will conduct a review of six (6) peer cities (Minneapolis, Portland, San Francisco, Seattle, Vancouver, BC, and Washington, DC) for best practices in the 5 E's including policies, staffing,

and project delivery. The key technical leads on this proposal, Alta and TDG, have offices in all of the peer cities, have led master plans for each of them, and will be able to efficiently gather this information with our network of contacts.

The City also has a goal of achieving recognition as a Gold-level Bicycle Friendly Community. Based on the peer cities review, Alta will develop strategies to guide Oakland toward reaching Gold. Strategies and actions will be framed as performance measures so that progress can be regularly monitored.

3.2 EXISTING BIKEWAYS ANALYSIS AND MAPPING

Our team will collect available mapping data (in ArcView GIS compatible format, where possible) to be used in preparing existing conditions base maps. Requested mapping data would include ESRI shapefiles of street centerlines, right-of-way widths, railroads and utilities, land uses, existing bicycle/pedestrian facilities such as sidewalks, bike lanes, and shared use paths, street trees, etc. Alta will create additional layers based on non-GIS data or fieldwork conducted as part of our inventory task. Alta will collect base mapping data from City of Oakland as well as other partner agencies such as AC Transit, BART, etc. Alta will update the City's bikeway GIS data consistent with Caltrans Class I, II, III, IV classifications as well as Alameda County Transportation Commission sub-classifications as appropriate. At the end of the project Alta will provide OakDOT with all GIS shapefiles and attribute tables collected and used in our analysis.

3.3 MODE SHARE AND COUNT DATA

Alta will collect and analyze data on the city's current bicycle ridership levels based on US Census, bicycle count data, transit provider data, and other available data sources. This chapter will integrate results from the citywide survey of residents and merchants (survey methodology described in detail in Task 3.4). The resident survey will classify Oakland's population into four categories: Strong and Fearless, Enthusiastic and Confident, Interested But Concerned, and No Way, No How (ie non-cyclists). Results will be presented citywide and also broken out by geographic/topographic differences between neighborhoods. Alta will also present the survey results in terms of Level of Comfort, using the responses to illustrate how comfortable residents are with different bikeway facility types ranging from bike lanes on arterials to low traffic bike boulevards to protected cycle tracks. The Level of Comfort is an important step in linking the needs and preferences of Oakland's population to the facility types being recommended.

3.4 EQUITY ANALYSIS

Alta will conduct an equity analysis building off the City's prior active transportation analysis using MTC Communities of Concern data. We will discuss potential use of additional indicators to develop a composite equity score. The following indicators are proposed as initial equity indices:

- Race: This indicator measures the percentage of the population that identifies as non-white.
- Age: Individuals under the age of 18 and over the age of 65 comprise this indicator. These two age groups are displayed separately to better identify the differing needs of these populations.
- Income: This indicator measures individuals of working age living at or below 200% of the Federal Poverty Level, which is a threshold set by the U.S. Census Bureau and is updated annually.
- Educational Attainment: This indicator represents the percentage of the population over 25 years of age that does not have a high school diploma or equivalent.
- Limited English Proficiency (LEP): This indicator measures the percentage of the population that identifies as not speaking English well or at all.
- Access to a Vehicle: This indicator measures the percentage of household who do not have regular access to a vehicle.

Equity scores will be mapped and compared to existing and proposed bikeways and other bikeway infrastructure and program data. The equity analysis will help demonstrates relative need for transportation investments based on concentrations of the populations listed above.

3.5 COLLISION ANALYSIS

Alta will perform a collision analysis of the last 10 years of data (SWITRS or Crossroads provided by the City) and develop graphics and maps to better communicate geographic patterns. We will conduct a more detailed location/causality analysis using the most recent 5 years of data. We anticipate conducting this analysis early in the process to inform our needs analysis and outreach. We will update the overall 10 year collisions maps prior to the final document publication so that data in the final plan is reflective of most current data.

3.6 DEMAND AND LEVEL OF TRAFFIC STRESS

The Alta team will analyze the reach and coverage of the proposed bikeway network both in distance from the primary, secondary, and tertiary network, as well as in the percentage that has access to the primary network via LTS 1 streets. While we understand the city has already done baseline LTS work, Alta is proposing to take this an additional step in developing a LTS-based connectivity analysis. The connectivity analysis will look at not only the segment links but also the intersection and crossing scores, and illustrate how a single “stress barrier” (e.g. a challenging crossing) can create areas of disconnectivity and islands along otherwise low-stress roadways. We have found it useful to use this information with key destinations to understand available route choices for bicyclists. Alta developed an extensive LTS crossing analysis for the City of Berkeley, and developed tools for Google and others that allow for evaluating projects improvements based on changes to connectivity and predicted increases in bicycling and safety, and community support.

Task 3 Deliverables:

- Existing bikeways mapping
- Counts and mode share estimates
- Equity Analysis
- Collision Analysis
- Demand and LTS

Task 4: UPDATED BICYCLE PLAN

4.1 GOALS AND POLICIES

The City has a specific goal of increasing bicycle mode share. Alta will work with city staff to identify an aspirational, but achievable bicycle mode share goal based on zone-specific targets across Oakland. The Alta team may recommend additional goals such as those related to safety, based on input from the community, stakeholders and peer cities.

4.2 PROPOSED BIKEWAY NETWORK

Alta will help the City update its proposed bikeway network using existing City tools, including the City's Bike Network 2.0 tool, and Alta's LTS routing tool for examining network connectivity

Based on the reach and coverage analysis (including LTS/ connectivity), as well as input gathered through extensive public engagement, the Alta team will work with City staff to identify and evaluate potential changes in the bikeway network.

In addition to corridor alignments, Alta will recommend intersection and crossing improvements along the network which may include RRFBs or Pedestrian Hybrid Beacons at currently uncontrolled crossings, or upgrading signalized intersections to provide additional channelization or to fully protected intersections depending on the approach facility design.

Finally, we will make recommendations for traffic calming enhancements on current or proposed Bicycle Boulevard/neighborhood greenway type Class III facilities. In our work with Berkeley and Emeryville Alta has done extensive research on bicycle boulevard speed and volume thresholds to identify where those exceed the LTS 1

comfort level, and we will identify general corridors where traffic calming may be necessary in order to bring a facility down to LTS 1.

4.3 PARKING AND SUPPORT FACILITIES

Support facilities for bicyclists include bicycle parking, wayfinding signs, kiosks, and staging areas at trailheads. Support facility types will be described and classified whenever possible. Specific bicycle parking recommendations will include review and recommendations related to the bicycle parking ordinance such as allowing people to bring bicycles into buildings if no parking is provided, continuing existing bicycle parking programs and expanding the installation of in-street bike corrals. This section will also include recommendations for bicycle signal detection to ensure that detectors are functional and that appropriate markings are provided for positioning. Signage and signal detection are considered components of the bikeways themselves and will be included in conceptual project descriptions as appropriate.

4.4 EDUCATION, ENCOURAGEMENT AND ENFORCEMENT

Alta will review existing bicycle education, encouragement, outreach and enforcement programs in Oakland. These will include programs initiated by the City, community groups, and agency partners such as Bike East Bay and the Alameda County SR2S program. Based on community / stakeholder interests, concerns, needs, and resources for programs as well as best practices for model programs, we will develop a set of 4 E's recommendations to improve bicycle Education, Encouragement, Enforcement, Evaluation, and public outreach efforts. TransForm will provide specific guidance on Enforcement issues in the Oakland context, including the word choice of "enforcement" to describe these strategies.

4.5 PRIORITY PROJECTS AND PROGRAMS

The current bike plan uses a scoring system based on several criteria to prioritize projects. While this can be effective, in a City as complex and diverse as Oakland, a more sophisticated project prioritization process may be useful to help ensure that investments are made in the most appropriate projects and to help communicate the prioritization process to the public and stakeholders.

Alta recommends develop a project prioritization process that uses the following principles:

- Responds to the goals and policies established for the plan. A good prioritization process can draw a clear line from the goals of the plan and the measures and process for prioritizing projects.
- Builds on the best quality data and analysis developed for the plan. Ultimately, projects for this plan will be developed that increase bicycling, improve bicyclist safety, and support other key goals. Using data from the LTS analysis, the proposed mode choice model, and other analyses, Alta will help Oakland develop measures that capture meaningful impacts of proposed projects
- Connects to a strategic vision for the City's bicycle network. A prioritized list of projects should consider not just how good any one project is, but how it helps build a connected and comfortable network for riders of all ages and abilities. Especially for a bicycle plan, it is important to consider the cumulative benefits of multiple projects together.
- Distinguishes projects by tier. Focusing on qualitative differences in projects can be more useful than making fine distinctions between projects. A good prioritization process can only take into account a limited set of data and information and should avoid creating a false sense of precision.
- Provides flexibility for application to Oakland's diverse neighborhoods. One likely element of a City vision for the bicycle network is likely to include the development of facilities that fit within the unique contexts of individual neighborhoods.
- Can be easily updated through time as projects are implemented and network gaps change.

Alta will work with the City to develop a clear, repeatable process and apply it to the current list of projects and newly identified projects that arise through the public outreach and analysis process. Alta will also develop a clear, graphical method for displaying project prioritization for the public and decision makers.

4.6 COSTS AND FUNDING

The Alta team will prepare a project database in Excel listing detailed information on each proposed improvement or segment length, corridor condition, and other information. Planning-level costs will be separated between land cost (if any), site preparation, planning, design and engineering costs, construction costs (including paving), and environmental documentation/mitigation costs (if any). Unit costs for design, construction, and environmental clearance of facilities will be discussed with OakDOT staff to ensure the costs matches recent bids in the City.

4.7 STAFFING FOR PROJECT DESIGN, DELIVERY, AND PUBLIC PARTICIPATION

TDG will lead this task drawing on extensive knowledge of the peer agencies identified by Oakland to provide a short summary of the organizational capacity of peers. We will provide both current understanding of organizational structure, staffing levels, and bicycle funding and information about how these have changed over time. The Alta team will also provide additional information for other relevant cities from our deep knowledge of bicycle planning in the U.S. The Alta team has worked with dozens of cities of similar size and character to Oakland and can provide information from our collect firm's experience with these agencies.

4.8 INTERSECTION DESIGN GUIDELINES

Linked to our LTS analysis and bikeway crossing recommendations, the Alta team will develop a set of Intersection Design Guidelines for bikeways. Recommendations may reference materials such as MassDOT Separated Bikeway Planning and Design Guide, as well as the NACTO Urban Bikeway Design Guide. The guidelines will focus on a construction level of detail for the Oakland context.

4.9 DOCUMENT PREPARATION

Alta will prepare a Bicycle Master Plan document to be suitable for high quality print production as well as viewing online with interactive and hyperlink functionality. Each plan chapter and the appendix will have separate pagination to facilitate a partial update to the plan in the future. Alta will use the Adobe Creative Suite to format the final document, however Alta will work with the City to apply a file format for the Implementation Guidelines and priority projects list that is best suited for dynamic updates by City staff. Alta will transmit all final product and source files to the City.

Task 4 Deliverables:

- Oakland Bicycle Master Plan document including all chapters above (digital files)
 - Internal Draft Bicycle Master Plan – Version 1
 - Internal Draft Bicycle Master Plan – Version 2
 - Public Draft Bicycle Master Plan
 - Revised Public Draft Bicycle Master Plan
 - Final Adopted Bicycle Master Plan

Task 5: Environmental Analysis/Document

Rincon will prepare a new focused EIR for CEQA compliance. A new EIR would be the most defensible environmental document, minimizing legal uncertainty: a legal challenge to an EIR would be required to meet the more stringent "substantial evidence" standard rather than simply make a "fair argument" that the project would result in significant impacts. Furthermore, a new EIR would enable efficient tiering for the environmental clearance of future projects listed under the Bicycle Master Plan. Finally, a new EIR may still take advantage of previously certified information that remains relevant.

Approach to Key Technical Issues

Our proposed technical approach is to review, verify, and utilize existing information to the maximum extent practical. Where necessary, we will conduct original research and analysis, as appropriate. The final scope of work for environmental and land use issues to be examined during the environmental review process will be based on

responses to the NOI and other input received during the public review process. Based on review of the proposed project and previous documentation, we anticipate the following issues will require the most detailed analysis:

Transportation and Circulation

Pursuant to SB 743, this section will evaluate the Bicycle Master Plan Update's impacts on the City's transportation network, using VMT as a metric. The Alta team will provide existing and estimated VMT data with implementation of the Bicycle Master Plan Update. It is assumed that an analysis of total trip time will be incorporated in addition to the VMT analysis. This section will also use data from the Alta team to evaluate impacts on travel times for AC Transit buses and on-street parking availability as a planning-related non-CEQA issue. In consultation with Alta, Rincon will evaluate on traffic safety for bicyclists, pedestrians, motorists, and bus riders from potential design hazards and potential temporary impacts from construction. Because protected bike lanes are a relatively new and evolving facility type on Oakland's streets and may introduce design hazards from motor vehicles parking in the bike lane or poor sight lines at intersections, this section will evaluate traffic safety impacts from implementation of such projects listed in the Bicycle Master Plan.

Air Quality

While bicycling does not generate emissions of air pollutants and in fact is assumed to reduce mobility-related emissions, the EIR will conservatively consider the potential air quality impacts of constructing bicycle infrastructure and any second-order effects associated with motor vehicle operations (i.e., road diets causing congestion that results in localized air quality impacts). Rincon will conduct a screening analysis of potential carbon monoxide (CO) "hot spots" for any intersections projected to operate below level of service (LOS) E. It is not expected that any violations of state or federal CO standards will occur; in the unlikely event that a potential "hot spot" is identified, more detailed CALINE modeling will be performed at a representative worst-case intersection. If CALINE modeling is performed, traffic volumes at study intersections would be required for existing, existing plus project, cumulative, and cumulative plus project scenarios. In addition, temporary air quality impacts from the future construction of individual projects listed in the Bicycle Master Plan will be evaluated at a programmatic level based on the Bay Area Air Quality Management District's emissions thresholds.

Mitigation measures will be written in terms of the "Standard Specification for Public Works Construction" ("Greenbook") and the City's Special Provisions which contain modifications to the Greenbook, where appropriate. Should the environmental review of the Bicycle Master Plan Update identify construction-related impacts that are not addressed by this framework, Rincon will propose modifications to the City's Special Provisions. Such modifications will be presented in wording that can be directly applied to conditions of approval and will be included in the mitigation monitoring and reporting program.

Rincon will initially prepare a detailed Project Description, in accordance with the requirements of Section 15124 of the CEQA Guidelines, for City review. A comprehensive and accurate Project Description is a critical early step in the CEQA process, since it forms the basis for environmental evaluation. After City review and approval of the Project Description, Rincon will prepare a detailed Initial Study for review by City staff. Each of the environmental issue areas included in the City's CEQA environmental checklist form will be addressed at a level of detail sufficient to allow the City to make determinations of significance.

The analysis will rely on existing, readily available information through public documents and other public sources, including the 2007 EIR insofar as it remains up-to-date. Where possible, impacts will be quantified. If existing data does not allow definitive quantification, reasonable assumptions will be used to qualitatively forecast potential impacts. However, due to the programmatic nature of the project, it is expected that much of the analysis will be qualitative.

After City review and approval of the Project Description, Rincon will prepare a detailed Initial Study for review by City staff. The Initial Study will be written for inclusion in the EIR as an appendix and will discuss each of the issues in the Initial Study checklist and how the project may or may not result in impacts for under each topic. When an issue is clearly scoped for full EIR inclusion, the Initial Study analysis will be brief and refer the reader to the EIR. Rincon will prepare a draft Notice of Preparation of an EIR (NOP) for City review and distribute to the State Clearinghouse and

Alameda County Clerk. It is assumed that the City will circulate the NOP to responsible agencies and other interested parties, although Rincon could assist with this task. During the NOP period, Rincon will design and manage a public scoping meeting and prepare a Scoping Session Report to the City Planning Commission.

Each environmental issue addressed in the EIR will have five main subsections: Setting, Methodology and Significance Thresholds, Impact Analysis (including cumulative impacts), Mitigation Measures, and Residual Impacts.

A discussion of three project alternatives that is intended to meet the requirements of Section 15126.6 of the State CEQA Guidelines will be provided in the EIR. The alternatives will be developed in consultation with City staff during preparation of the first Administrative Draft EIR. Specifically, the analysis will determine whether each alternative's impacts would be greater or less than those of the proposed project, the magnitude of impacts (i.e., significant or less than significant), and whether mitigation requirements for the project would apply. This section will also identify the "environmentally superior alternative."

Rincon will provide three rounds of administrative draft EIRs and a screencheck version for City review before publication of the Public Draft EIR and will prepare a draft Notice of Availability of an EIR for City review. This document will be circulated for public comment for a period of 45 days, as required by CEQA. This scope assumes that the City will be responsible for circulating the Draft EIR to commenting agencies and interested groups or individuals, although Rincon can assist with this task. Rincon will file the Notice of Availability with the State Clearinghouse and County Clerk. We have also assumed that the City will give notice to all organizations and individuals who have expressed interest in receiving such notice, and will publish the notice of availability in a local newspaper.

Following the close of the public review period for the Public Draft EIR, Rincon will prepare the Administrative Final EIR and all Supporting Documents for review by City staff. The Administrative Final EIR will include all comment letters received during the public review period, responses to all comments received on the Public Draft EIR, and any necessary text changes. The Administrative Final EIR will also include a separate Mitigation Monitoring and Reporting Program (MMRP). After review and approval of the Administrative Final EIR by City staff, Rincon will prepare the Final EIR and all necessary supporting documents, including final versions of the MMRP and CEQA Findings.

Rincon will also prepare staff reports for Planning Commission and City Council hearings on the Bicycle Master Plan.

Deliverables:

- Detailed Project Description
- Initial Study
- Notice of Preparation
- Scoping Session Report to City Planning Commission
- Three administrative drafts of EIR and screencheck version
- Public Draft EIR/Notice of Availability
- Administrative Final EIR
- Final EIR with MMRP and CEQA Findings
- Planning Commission staff report
- City Council staff report

DRAFT

FILED
OFFICE OF THE CITY CLERK
OAKLAND

OAKLAND CITY COUNCIL

City Attorney

2017 MAY 18 PM 1:01

RESOLUTION No. _____ C.M.S.

Introduced by Councilmember _____

RESOLUTION AUTHORIZING THE CITY ADMINISTRATOR OR DESIGNEE TO NEGOTIATE AND EXECUTE A PROFESSIONAL SERVICES CONTRACT FOR A TOTAL AMOUNT NOT TO EXCEED SIX HUNDRED THOUSAND DOLLARS (\$600,000.00), INCLUDING A CONTINGENCY OF FIFTY-FIVE THOUSAND DOLLARS (\$55,000.00) WITH ALTA PLANNING + DESIGN FOR PROFESSIONAL SERVICES OF PLANNING, ENGINEERING, AND ENVIRONMENTAL REVIEW FOR THE BICYCLE MASTER PLAN UPDATE FOR A TERM OF THREE (3) YEARS.

WHEREAS, an adopted Bicycle Master Plan is required for grant funding from many programs including the State’s Bicycle Transportation Account and Measure B/Measure BB; and

WHEREAS, Bicycle Master Plans must be updated or reaffirmed every five years to ensure eligibility for the State’s Bicycle Transportation Account; and

WHEREAS, Oakland last reaffirmed its Bicycle Master Plan in 2012; and

WHEREAS, the City conducted a qualification process in accordance with Oakland Municipal Code Chapter 2.04.045 to select a planning, engineering, and environmental review consultant team to support the development of a Bicycle Master Plan Update; and

WHEREAS, through that competitive process, a staff panel recommended Alta Planning + Design for contract negotiation; and

WHEREAS, Alta Planning + Design has met the City’s 50% Local/Small Local Business Enterprises (LBE/SLBE) Program requirements and will be in compliance with the Equal Benefits Ordinance (EBO) prior to signing a contract; and

WHEREAS, the City Council finds that the services provided pursuant to the agreements authorized hereunder are of a professional, scientific or technical nature and are temporary in nature; and

WHEREAS, the City Council finds that the agreement shall not result in the loss of employment or salary by any person having permanent status in the competitive service; now, therefore be it

RESOLVED: The City Council authorizes the City Administrator Or Designee to negotiate and execute a professional services contract for a total amount not to exceed six hundred thousand dollars (\$600,000.00) including a contingency of fifty-five thousand dollars (\$55,000.00) with Alta Planning+Design for professional services of planning, engineering, and environmental review for the Bicycle Master Plan Update for a term of three 3 years; and be it

FURTHER RESOLVED: That funds totaling \$600,000 for the contract are available in the Transportation Development Act, Fund (2162); Organization (30275); Project (1000925); and Measure BB, Fund (2216); Organization (30275); Project (1001435).

IN COUNCIL, OAKLAND, CALIFORNIA, _____

PASSED BY THE FOLLOWING VOTE:

AYES - BROOKS, CAMPBELL WASHINGTON, GALLO, GIBSON MCELHANEY, GUILLEN, KALB, KAPLAN, AND PRESIDENT REID

NOES -

ABSENT -

ABSTENTION -

ATTEST: _____
LaTonda Simmons
City Clerk and Clerk of the Council
of the City of Oakland, California