

October 18, 2016

REQUEST FOR PROPOSALS

Dear Proposers:

The Association of Bay Area Governments (ABAG), a joint powers agency, formed under California Government Code Sections 6500, et. seq., invites qualified Proposers to respond to this Request for Proposals (RFP) for:

San Francisco Bay Area Water Trail Map Project

BACKGROUND

The San Francisco Bay Area Water Trail Map Project (Project) is being managed by the San Francisco Bay Area Water Trail and the San Francisco Estuary Partnership, which are both programs of ABAG. The San Francisco Estuary Partnership is a coalition of resource agencies, non-profits, citizens, and scientists working to protect, restore, and enhance water quality and fish and wildlife habitat in and around the San Francisco Bay Estuary. The San Francisco Bay Area Water Trail (Water Trail) is a growing network of designated launching and landing sites, or “trailheads,” around San Francisco Bay. Each trailhead enables non-motorized small boat users to enjoy the historic, scenic, cultural, and environmental richness of San Francisco Bay and its nearby tributary waters. The Water Trail promotes safe and responsible use of the Bay while protecting and increasing appreciation of its environmental and cultural resources. The Water Trail’s network of sites encourages people to explore the Bay in different boat types (such as kayaks, sailboards, dragon boats, and stand up paddleboards) and in a variety of settings through single- and multi-day trips. Potentially, more than 100 existing marinas, waterfront parks, and other publicly accessible sites will become part of the Water Trail.

Printed maps of the Water Trail system are needed as an important outreach and education tool for shoreline excursions. These maps are needed to provide a consolidated, user-friendly source of information that will encourage Bay Area residents to enjoy and better understand the San Francisco Bay Estuary. As demand for public access continues to grow throughout the Bay Area, the availability of interpretive materials will encourage access and behavior that does not result in negative impacts to local species and sensitive habitats of the San Francisco Bay Estuary. Water Trail staff seeks to retain a consultant to assist with map design and layout while keeping usability, sustainability and durability in the forefront.

PURPOSE OF THIS REQUEST FOR PROPOSAL

The purpose of this RFP is to solicit responses from consultants with expertise in cartography and graphic design to create four high-quality wayfinding maps covering different areas of the San Francisco Bay Estuary. These printed maps will serve as a key branding and marketing tool for the San Francisco Bay Area Water Trail and San Francisco Estuary Partnership. ABAG is seeking consultants that can provide professional recommendations on map design, (i.e. colors, font, layout, scale, legend, icons), layout of text and images, GIS functionality, packaging and printing. The Proposer shall perform all services on this Project in accordance with the standards of its profession.

This letter, together with the General Information and Proposing Requirements, Special Conditions, and Appendices A through E, inclusive, comprise the formal RFP for this Project. Responses to the RFP are to

be submitted in accordance with the instructions stated herein. Contact Ben Botkin at 415-820-7936 or benb@abag.ca.gov if you would like a copy of the Water Trail GIS shapefile.

SPECIFICATIONS

The specifications for this Project are identified in Appendix A, Scope of Services, to this RFP. Section II of this RFP, Special Conditions, also contains substantive requirements with which Proposers should comply to ensure responsiveness with this RFP.

RFP EVALUATION AND SELECTION CRITERIA

The goal for each prospective consultant should be to prepare a proposal that is brief, yet comprehensive. The proposal should describe the consultant's approach to the project and explain how the project team would accomplish the project tasks. The specifications provided in Appendix A are to be used as a basis for submission of Proposals. All proposals must be completed and submitted on the enclosed Appendix B, Proposal Form, in order to be considered.

Appendix C, Reference Form, and Appendix D, Personnel Form, must also be submitted with the Proposal. **PROPOSERS WHO DO NOT COMPLETE APPENDICES RISK BEING FOUND NON-RESPONSIVE.**

The Selection Committee will evaluate the Proposals according to the criteria outlined below.

Selection Criteria:

- A. Quality of Proposal
 - 1. Consistency with the Water Trail and Estuary Partnership's objectives
 - 2. Demonstrates a full understanding of the project
 - 3. Fulfills proposal requirements as described in the RFP

- B. Project Approach
 - 1. Proposed work plan and approach
 - 2. Ability to meet work schedule and demonstrate cost reduction strategies

- C. Assigned Project Staff and Firm Expertise
 - 1. Proven track record and technical ability to accomplish tasks
 - 2. Background, qualifications, experience and expertise of firm (including any subconsultants) in similar projects
 - 3. Workload, staff availability, and accessibility of staff assigned to the project
 - 4. Quality of recently completed projects, including adherence to schedules, deadlines and budgets

The top two firms evaluated as most qualified to perform the required services may be selected for an interview. Through the interview, the Selection Committee would evaluate and rank those selected firms according to pre-determined criteria outlined in this RFP.

ABAG will negotiate with the highest ranked firm. If ABAG is unable to negotiate a satisfactory agreement with the top-ranked firm, ABAG will negotiate with the other firm until it has reached a satisfactory contractual agreement.

ABAG reserves the right to award a contract or to reject all Proposals.

SUBMISSION SCHEDULE

Interested Proposers must submit their Proposals electronically or in sealed envelopes by November 10, 2016 5:00 p.m. Proposals received after that date and time will not be given consideration.

POINT OF CONTACT

RFP responses and all inquiries relating to this RFP should be directed as shown below.

Attention: Ben Botkin
Association of Bay Area Governments
375 Beale Street, Suite 700
San Francisco, CA 94105
e-mail: benb@abag.ca.gov

Telephone: (415) 820-7936

SELECTION TIMETABLE

- November 4, 2016 5:00 p.m. – Deadline for receipt of written questions on RFP
- November 10, 2016 5:00 p.m. - Closing date and time for receipt of proposals and proposal opening
- Week of November 14, 2016 – Interviews
- Week of November 28, 2016 – Contract Negotiation

ABAG wishes to express its appreciation to you for your participation.

Best Regards,



Ben Botkin
Water Trail Project Planner

Enclosures

REQUEST FOR PROPOSALS

BY

ASSOCIATION OF BAY AREA GOVERNMENTS

FOR

SAN FRANCISCO BAY AREA WATER TRAIL MAP PROJECT

OCTOBER 18, 2016

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I. GENERAL INFORMATION AND PROPOSAL REQUIREMENTS

A. Directions

This package contains the specifications and proposal forms for the services to be performed. (See Appendix A - Scope of Services, Appendix B - Proposal Form, Appendix C - Reference Form, Appendix D-1 - Personnel Form, and Appendix D-2 - Subcontractor Form.) Space has been provided on the Proposal Form for appropriate response regarding proposed cost information. Please separate all costs on Proposal Form, as indicated. A Reference Form (Appendix C), Personnel Form (Appendix D-1); and Subcontractor Form (Appendix D-2) must also accompany each Proposal submittal, as applicable. PROPOSERS WHO DO NOT COMPLETE APPENDICES B, C, D-1 AND D-2 RISK BEING FOUND NON-RESPONSIVE.

The provisions set forth below specify the standards by which Proposals will be received and considered by ABAG. Proposals not complying with these provisions may be considered non-responsive by ABAG.

B. Definitions

1. ABAG: Association of Bay Area Governments
2. Proposer: An individual, firm, partnership, corporation, or combination thereof, submitting a Proposal.
3. Proposal: The documents included in this RFP become a Proposal when completed properly by a Proposer and submitted to ABAG.

C. Preparation of Proposal

1. General: All prices and quotations shall be written legibly by computer or pen and ink. No erasures shall be made. Errors may be crossed out and corrected by pen and ink adjacent to the item crossed out. Each correction shall be initialed in ink by the person signing the proposal.
2. Taxes: The total proposal price shall include full compensation for all applicable federal, state, and local taxes, as may be appropriate.
3. Irregular Proposals: Proposals may be rejected if they show such irregularities as: any alteration of forms, additions not called for, conditional Proposals, incomplete Proposals, statement or omission which make the Proposals incomplete, indefinite or ambiguous, obviously unbalanced prices, or a signature by other than an authorized person.
4. Conditional Proposals: No condition included in a Proposal shall be binding upon ABAG if in conflict with, inconsistent with, or in addition to the terms and conditions of this RFP, unless expressly accepted in writing by ABAG.
5. Form: Only Proposals submitted on the furnished Proposal Form will be considered.

6. Submission: Proposals received after the date and time indicated for receipt of Proposals will not be considered. Proposers will be solely responsible for the delivery of Proposal to ABAG by the time and at the location indicated for receipt of Proposals.

7. Withdrawal before Proposal Opening: No Proposal may be modified; however, a Proposal may be withdrawn by written request, signed by the individual who signed the Proposal or his authorized representative, and received by ABAG prior to the time indicated for receipt of Proposal.

8. Protest of Specifications: Prospective Proposers may submit written protests of RFP specifications at least three (3) working days prior to the date of proposal opening on the grounds that the specifications are unduly restrictive, discourage competition, or do not comply with federal, state or local law or regulation. Such protests will be reviewed by ABAG in accordance with the procedures specified in D(6) below and responded to prior to proposal opening. If appropriate, the time of proposal opening will be extended to permit the protesting party to submit a Proposal

9. Relief of Proposer after Proposal Opening: Unless ABAG in its sole discretion elects otherwise, a Proposer shall not be relieved of his/her Proposal nor shall any change be made in his/her Proposal because of a mistake. If a Proposer requests relief and ABAG agrees to consider such request, it will be such Proposer's responsibility to establish that:

- (a) A mistake was made;
- (b) The Proposer gave ABAG written notice of the mistake within five (5) days after the opening of Proposals, specifying in detail how the mistake occurred;
- (c) The mistake made the Proposal materially different than the Proposer intended it to be; and
- (d) The mistake was made in filling out the Proposal and was not due to error in judgment or to carelessness in reading the RFP or referenced documents.

D. Award of Contract

1. Proposal Opening: Proposals will be opened publicly and publicly announced at ABAG's office, at the address, on the date, and at the hour indicated in the letter transmitted with RFP. Proposers are not required to be present.

2. Duration of Offer: A signed Proposal is deemed to be an offer to enter into a contract for services proposed and is firm for sixty (60) days from the date of the proposal opening unless extended by the Proposer.

3. Discretion of ABAG: ABAG reserves the right to reject any and all Proposals and to waive informalities and minor irregularities in Proposals received, other provisions herein notwithstanding.

4. Selection of Contractor: The award, if an award is made, will be to the responsible Proposer whose Proposal, conforming in all material respects to the terms and conditions of this RFP, is selected by the Selection Committee in accordance with the RFP evaluation and selection criteria. A Proposer to whom the contract is awarded is to be the contractor performing the service: the award may not be transferred to a third party.

APPENDIX A
SAN FRANCISCO BAY AREA WATER TRAIL MAP PROJECT

SCOPE OF SERVICES

PROJECT REQUIREMENTS

Based on the general description and statement of the Project requirements, the Proposer shall perform the following tasks:

TASK 1: ANALYZE AND EVALUATE EXISTING WATER TRAIL GIS DATA

1.1: Project Kickoff

Consultant will meet with Water Trail staff for a project kickoff meeting. Goals, schedule, and project overview will be discussed. Consultant will review background information, current maps as well as GIS data available to date by and for the Water Trail Project.

1.2: Recommend modifications—if any—to existing GIS geodatabase

Water Trail staff will work closely with the consultant to identify and update the existing Water Trail geodatabase in order to facilitate map production. A copy of the current Water Trail GIS geodatabase is available upon request. Consultant may be asked to collect geodata from available sources if the Water Trail geodatabase are determined to be out of date or insufficient.

Task 1 Deliverables: New/updated GIS format to facilitate current and future map updates, as needed.

TASK 2: DEVELOP MAP AND INTERPRETIVE INFORMATION DESIGN AND LAYOUT

Working closely with Water Trail staff, the consultant will present and discuss options for map design and layout. The Water Trail maps are an important part of the Project's "brand", and therefore must achieve the following baseline goals:

1. Graphically attractive—the maps are the Water Trail's best marketing opportunity. Information should excite interest.
2. Usability—the public will be using these maps in the field for wayfinding purposes. Maps will be geographically accurate and include information on routes, distances between destinations, potential hazards (mudflats), sensitive habitat areas, etc.
3. Educational – interpretive information needs to be presented in a way that is informative but accessible to a broad range of audiences.
4. Durability—because the maps are intended for use in the field, waterproof paper and durability is of paramount importance.
5. Sustainability—the maps should be made of recycled and/or sustainable materials.

2.1: Map design

It is the intent of this project to develop four individual maps covering regions of the San Francisco Bay Estuary: Napa/Sonoma; Petaluma River/Marin; Inland Coast/Carquinez Strait; and, the South Bay. The approximate area covered under each map is shown in Appendix E, but actual extent will be subject to revision during the map design process. These areas were selected as they represent the regions with the greatest extent of natural or restored wetlands and estuarine habitats in the greater Bay Area. It is anticipated that each map will feature inset maps for key areas.

Maps will be modeled after those produced by the National Park Service, with an access map on one side and interpretation on the other. The front side would be the map, identifying key recreation and environmental features within each area. The back side would consist of text and graphics specific to each region, detailing information in five broad categories: Habitat/Wildlife; Estuary Processes; Sea Level Rise/Climate Change/Restoration; History/ Culture; and, Recreation/Safety/Ethics. It is anticipated that much of the interpretive information will be similar or the same for each map (i.e., habitats, estuary processes, safety, ethics etc.), with some region specific information (i.e., wildlife, restoration, history, etc.). Water Trail and San Francisco Estuary Partnership staff will provide all text, photographs and logos to consultant.

Consistent with the goals listed above, the consultant will provide cartography and graphic design services for map colors, font, layout, scale, legend, icons and other map-based components and will work closely with Water Trail staff to incorporate text, art, and photographs interpreting resources for each map region. Consultant will also incorporate text, logos, photographs and websites on the maps necessary to convey additional information about the trail and region. It is anticipated that the maps will be designed in Adobe Illustrator or similar program. A digital design of each map will need to also be produced to accommodate posting on the Water Trail and Estuary Partnerships' websites.

Task 2 Deliverables: Map design and layout for all four regions. All digital files used in the design and production of each map will also be provided to ABAG electronically.

TASK 3: SOLICIT BIDS FROM QUALIFIED PRINTERS AND MANAGE PRINTING PROCESS

3.1: Produce final printed maps for distribution

Using their knowledge of professional printers (quality, cost, reliability, sustainable practices), the selected consultant will assist Water Trail staff in preparing a solicitation of competitive bids from printers, reviewing the bids and selecting a printer. Maps will be printed on waterproof paper. The consultant will manage the printing process including any press checks. ABAG will have final sign-off. The contract for printing services will be between ABAG and the printer, and costs for printing are not a part of this scope of services.

Task 3 Deliverables: Final printed Water Trail maps for distribution and digital files for posting on Water Trail website.

Schedule

All work performed by the consultant as outlined above must be complete no later than June 16, 2017.

**APPENDIX B
PROPOSAL FORM
COST ESTIMATE**

Costs

TASK 1: ANALYZE AND EVALUATE EXISTING WATER TRAIL GIS DATA

TASK 1.1	Project Kickoff	\$ _____
TASK 1.2	Recommend modifications to GIS	\$ _____

TASK 2: DEVELOP MAP AND INTERPRETIVE INFORMATION DESIGN AND LAYOUT

TASK 2.1:	Map design	\$ _____
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TASK 3: SOLICIT BIDS FROM QUALIFIED PRINTERS AND MANAGING PRINTING PROCESS

TASK 3.1:	Produce final printed maps for distribution	\$ _____
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<u>Total Cost Estimate:</u>	\$ _____
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<u>Discounted Services:</u>	\$ _____
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(Discounted prices quoted in comparison to normally charged rates will be considered “match” and the contractor will be awarded additional points based on the size of the discount. To be awarded these points, proof of normal rates will need to be provided and compared to the proposed rates for this contract.)

<u>Total Cost Estimate (with Discounted Services)</u>	\$ _____
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PROPOSER'S QUALIFICATIONS

<u>Proposer certifies that it:</u>	YES	NO
1. has been regularly engaged in the business of cartography, map design, and graphic design for at least 3 years	_____	_____
2. has successfully designed and developed high-quality wayfinding maps for commercial or educational purposes in the last three years	_____	_____

(All Proposers shall complete Appendix C.) Proposers may be required to verify these qualifications prior to the award of contract.

For Information purposes only:

Name of Proposing Company: _____

Address: _____

Representative Name and Title:

Telephone No. _____

Authorized Signature: _____

Date: _____

APPENDIX C
REFERENCE FORM

Name of Proposing Company _____
Representative Name & Title _____
Telephone Number _____

Reference list shall include names and telephone numbers of contracts completed. Proposers shall list a minimum of three (3) separate contracts for similar services that have occurred within the last five years where Proposer successfully provided such services.

1. Client's Name _____
Contact Person/Phone _____
Address _____
Type of document prepared _____
Cost Estimate of Project \$ _____ Actual Cost of Project \$ _____
Explanation of differential between estimated cost and actual cost, if any

Original Estimate of Time to Complete _____ Actual Time to Complete _____
Explanation of differential between estimated time and actual time, if any

2. Client's Name _____
Contact Person/Phone _____
Address _____
Type of document prepared _____
Cost Estimate of Project \$ _____ Actual Cost of Project \$ _____
Explanation of differential between estimated cost and actual cost, if any

Original Estimate of Time to Complete _____ Actual Time to Complete _____
Explanation of differential between estimated time and actual time, if any

3. Client's Name _____
Contact Person/Phone _____
Address _____
Type of document prepared _____
Cost Estimate of Project \$_____ Actual Cost of Project \$ _____
Explanation of differential between estimated cost and actual cost, if any

Original Estimate of Time to Complete_____ Actual Time to Complete _____
Explanation of differential between estimated time and actual time, if any

4. Client's Name _____
Contact Person/Phone _____
Address _____
Type of document prepared _____
Cost Estimate of Project \$_____ Actual Cost of Project \$ _____
Explanation of differential between estimated cost and actual cost, if any

Original Estimate of Time to Complete_____ Actual Time to Complete _____
Explanation of differential between estimated time and actual time, if any

**APPENDIX D-1
PERSONNEL FORM**

List personnel Proposer will assign to the Project, Proposer must provide the following information and attach a resume:

PERSONNEL

1. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

2. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

3. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

4. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

5. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

6. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

7. Name & Title _____
Work to be Performed _____
Billing Rate/Cost _____

APPENDIX D-2
SUBCONTRACTOR FORM

For each subcontractor Proposer expects to use on the Project, Proposer must provide the following information:

1. Name of Subcontractor _____
Representative Name & Title _____
Phone No. _____ Work to be Performed _____

References _____

2. Name of Subcontractor _____
Representative Name & Title _____
Phone No. _____ Work to be Performed _____

References _____

3. Name of Subcontractor _____
Representative Name & Title _____
Phone No. _____ Work to be Performed _____

References _____

4. Name of Subcontractor _____
Representative Name & Title _____
Phone No. _____ Work to be Performed _____

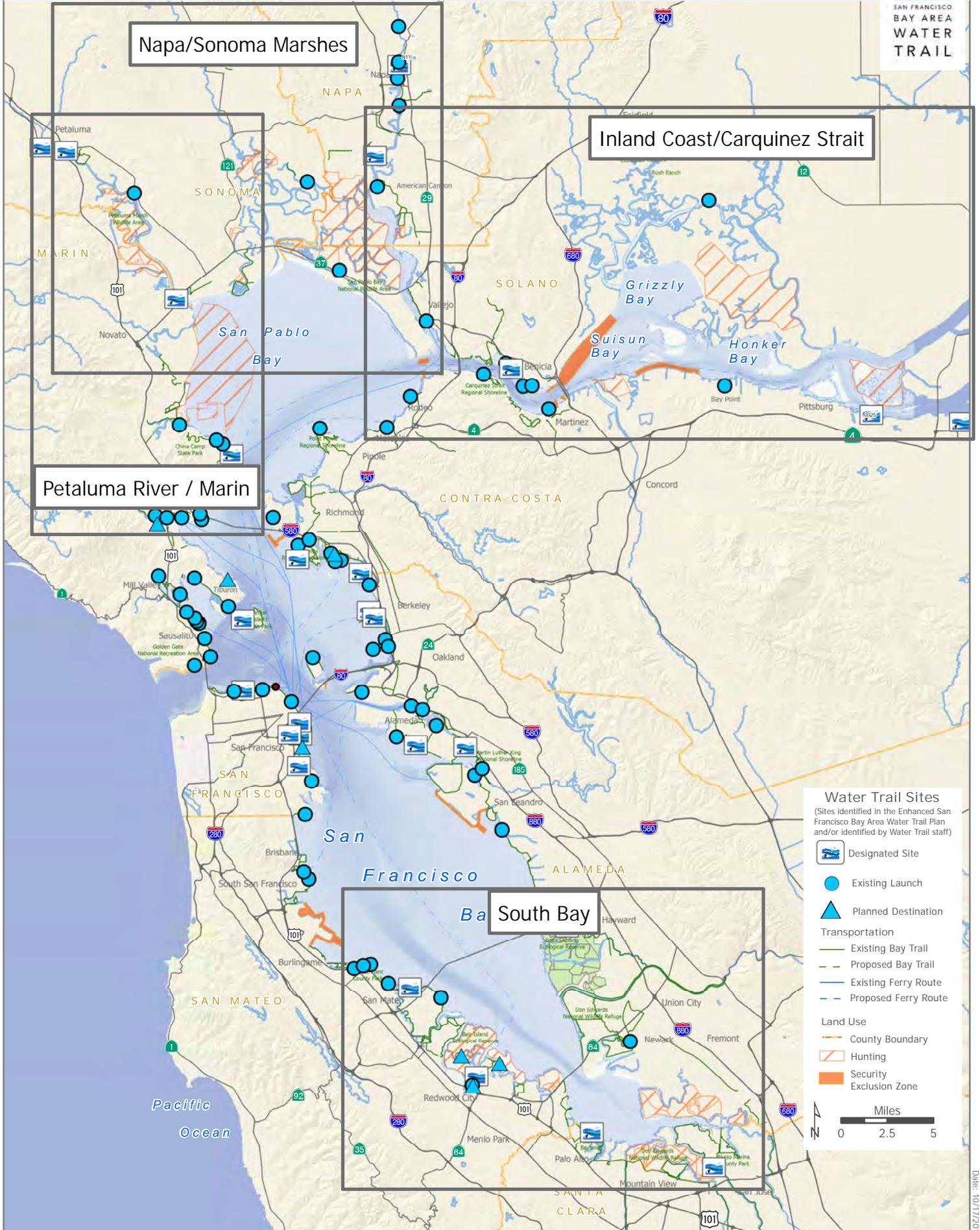
References _____

5. Name of Subcontractor _____
Representative Name & Title _____
Phone No. _____ Work to be Performed _____

References _____

Appendix E. San Francisco Bay Area Water Trail

Approximate Map Area Coverages



Water Trail Sites
 (Sites identified in the Enhanced San Francisco Bay Area Water Trail Plan and/or identified by Water Trail staff)

- Designated Site
- Existing Launch
- Planned Destination

Transportation

- Existing Bay Trail
- Proposed Bay Trail
- Existing Ferry Route
- Proposed Ferry Route

Land Use

- County Boundary
- Hunting
- Security Exclusion Zone

Miles
 0 2.5 5