



**REQUEST FOR SERVICES**  
**SANTA ANA RIVER TRAIL & PARKWAY**  
**ACTIVE TRANSPORTATION PROJECT**  
July 6, 2016

The State of California Coastal Conservancy (Conservancy) seeks the services of a consultant firm or team (Consultant) to conduct specific tasks that will promote active transportation use of the Santa Ana River Trail & Parkway. Respondents to this Request for Services must submit the information requested below electronically in Microsoft Word or PDF format to: Julia Elkin at [julia.elkin@scc.ca.gov](mailto:julia.elkin@scc.ca.gov) on or before **5:00 p.m. on August 5, 2016**. Please limit total file size below 5 MB.

### **Background**

In 2014, the California state legislature (SB 1390, Public Resources Code (PRC) sections 31170-31179), created the Santa Ana River Conservancy Program within the Conservancy to address resource and recreational goals of the Santa Ana River region.

A key focus for the newly-formed Conservancy Program is the Santa Ana River Trail & Parkway (Trail). Designated a National Recreation Trail in 1977, the longstanding vision for the trail has been to create a contiguous non-motorized access way extending 100 miles from the crest of the San Bernardino Mountains down to the coast at Huntington Beach. To date, more than half of the trail has been completed or is under construction, providing multi-use active transportation opportunities for pedestrians, cyclists, commuters and equestrians. Upon completion, it will be one of the longest urban recreation and river parkways in the United States and will connect inland communities to existing sections of the California Coastal Trail. Existing segments of the Parkway span three counties and 17 cities (see Attachment 1).

In 2016, the Conservancy was allocated an Active Transportation Program (ATP) grant from the California Department of Transportation for non-infrastructure public education and encouragement projects along the Santa Ana River Trail (see Attachment 2). California Department of Transportation defines rules and eligible and ineligible expenditures for these grant funds; adherence to these rules will be required of the Conservancy's subcontractor(s) (see Attachment 3).

### **Service Area**

The geographic scope for this project is defined by the existing and projected Santa Ana River Trail alignment. Work associated with this project will require coordinating with diverse entities throughout the tri-county watershed.

## Scope of Work

The Conservancy seeks a Consultant(s) to complete mapping tasks and to develop and conduct public programs and outreach as defined below. The Consultant(s) shall work at the direction of Conservancy staff and shall receive input throughout the project from Conservancy staff and the Santa Ana River Conservancy Program Policy Advisory Group.

Active transportation programming and public events produced through this contract shall increase public use of the Santa Ana River Trail through an emphasis on public health and wellness.

\*\*\*Please note that Consultants may submit a proposal for just Tasks A&B, for just Tasks C&D, or for all of Tasks A thru D\*\*\*

Tasks and funds allocated for this contract are:

**Task A: Trail Map Development** (up to \$60,000 for labor and up to \$500 for travel costs)  
Design and electronically publish trail maps of Santa Ana River Trail (SART) showing distance, features and amenities, trail head accessibility, and regional transportation linkages for all 16 cities along the SART

*Task A Deliverables:*

- Final map design files to use in web publishing and print production of trail maps for each of the 16 cities along the SART
- Publication of trail maps on relevant and publically accessible websites

**Task B: Trail Map Publication** (up to \$24,000 for printing costs)  
Use Task A designs to print pocket-sized trail maps for each of the 16 cities along the SART

*Task B Deliverables:*

- Printed pocket-size trail maps for distribution within each of the 16 cities along the SART

**Task C: Outreach Programs Development** (up to \$65,400 for labor)  
Work with regional partners (including Orange County Parks, Riverside County Regional Park and Open Space District, San Bernardino County Regional Parks, recreational trail user groups, and the region's public health organizations) to develop locally-sustained Santa Ana River Trail active transportation programs and outreach events

C-1: Identify and engage regional partners from county park departments, trail user groups, and the public health community

C-2: Work with regional partners to identify existing family health/walking and cycling/bike to work programs as well as existing ATP related events held around the Santa Ana River Trail

C-3: Develop family health programs and bike to work programs

C-4: Plan for future continuation of programs and events developed under this ATP grant

C-5: Conduct trail user counts at outset and conclusion of ATP grant period

*Task C Deliverables:*

- List of public health and open space organizations in the tri-county project area
- List of existing programs and events
- Plan(s) for active transportation programs along the SART (including but not limited to signage, buddy-programs, public safety education, or other necessary program support)
- Long term program strategy for sustaining ATP program efforts by tri-county partners
- Trail count data from outset and conclusion of ATP grant period

**Task D: Public Outreach Events** (up to \$15,840 for labor; up to \$12,000 for event costs)  
Develop, coordinate, and produce twelve ATP public outreach events over two years  
(2 per county per year for 2 years in Orange, Riverside, and San Bernardino counties)

*Task D Deliverables:*

- 12 public events hosted and participation tracked

## **Schedule**

The Consultant should complete project tasks within a maximum of twenty four months of the notice to proceed from the Conservancy. Please provide a project schedule including pertinent milestones as an element of the submittal outlined below.

## **Information to Be Included in Consultant's Submittal**

The total proposal package should be no more than 15 pages.

1. A more detailed scope of work for Tasks A through D (*or* Tasks A&B *or* Tasks C&D) of this project describing anticipated approach to the work. (4 pages maximum)
2. A proposed schedule to complete the tasks identified in the Scope of Work. (1 page maximum)
3. Description of past and/or current involvement with three relevant projects completed by the Consultant within the past five years. Please specify what work was performed by which individuals, client name and contact information, brief project description, and how the project relates to this proposed scope of work. (2 pages maximum)
4. A project organization chart showing how your project team is organized including roles of the project manager and other key team members and level of participation of each team member. Please specify if team members and/or subcontractors have worked together on projects in the past. Provide availability of key team members to participate in the project work. (1 page maximum)
5. Resumes for the project manager and key team members. (1 page maximum each, 3 resumes maximum)

6. Contact information for three references familiar with Consultant's performance on comparable projects. (half page maximum)
7. Any potential conflicts of interest that the firm/team may have in carrying out the tasks described herein, including with Public Contracts Code section 10411, regarding former state employees. (half page maximum)
8. Familiarity with state and federal grant procedures (1 page maximum): Describe experience working under state or federal funding. Provide a copy of Indirect Cost Rate Evaluation.

### **Selection Process and Criteria**

The Conservancy may request supplemental information. Interviews may be conducted if deemed necessary. Potential contractors will be ranked based on the following criteria:

1. Consultant's understanding of the nature of the proposed work, as demonstrated by the Scope of Work, including specific approaches, recommended actions and proposed products.
2. Demonstrated capability and competence to perform the work including the consultant's past experience with similar projects, the education and experience of key personnel, and the nature and quality of the firm(s)'s past completed work.
3. Small business enterprise (SBE) status of the consultant.
4. Disabled veteran business enterprise (DVBE) status of the consultant or the good faith effort of the contractor to subcontract with DVBEs as set forth in Public Contract Code Section 10115.

These factors will be weighed according to the nature of the project, the needs of the Conservancy, and the complexity and special requirements of the project.

### **Payment**

The Consultant will be reimbursed for actual time and expenses up to the amount provided for each task as stated above. The Consultant should anticipate that ten percent (10%) will be withheld until all work is completed to the satisfaction of the Conservancy. The Conservancy must also approve all interim work products before payment. The Consultant will be hired under contract to the Conservancy.

### **Contacts**

For questions about the submittal process or the project, please contact Julia Elkin at [julia.elkin@scc.ca.gov](mailto:julia.elkin@scc.ca.gov) or (510) 286-0736.

**ATTACHMENT 1**  
**Counties and Cities within the Project Area**

**Counties within the Project Area**

San Bernardino County  
Riverside County  
Orange County

**Cities within the Project Area**

Redlands  
Colton  
Highland  
San Bernardino  
Riverside  
Norco  
Eastvale  
Jurupa Valley  
Yorba Linda  
Anaheim  
Garden Grove  
Orange  
Santa Ana  
Fountain Valley  
Huntington Beach  
Costa Mesa

**Cities adjacent to and influencing Project Area**

Rialto  
Gran Terrace  
Corona  
Chino Hills  
Placentia  
Newport Beach

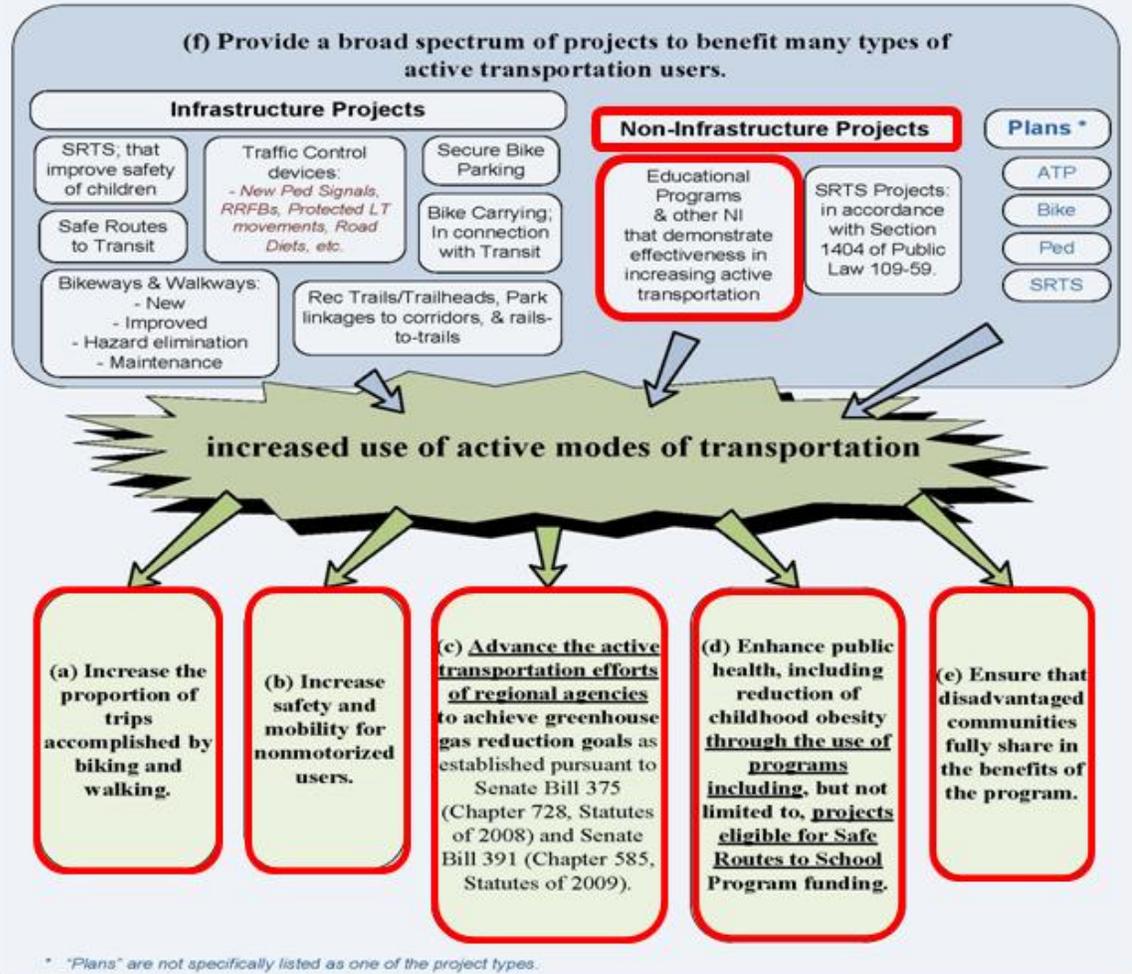
ATTACHMENT 2

# ATP Purpose and Goals

As defined by the State Legislature and SB99

2380. There is hereby established the Active Transportation Program in the department for the purpose of encouraging increased use of active modes of transportation, such as biking and walking.

It is the intent of the Legislature that the program achieve all of the following goals: (a) - (f)



**ATTACHMENT 3**  
**Active Transportation Program - Non-Infrastructure Program Guidance**  
**Effective Date: June 11, 2015**

The Active Transportation Program (ATP) is a combination of State and Federal funding sources, and covers a wide variety of project types. These guidelines are provided to assist agencies in understanding eligible non-infrastructure expenditures under the ATP.

**Operating Expenses**

**Notes:**

- ATP Guidelines state that the CTC Commission’s intention was to fund ATP non-infrastructure pilot and start-up projects that can demonstrate funding for ongoing efforts. The Active Transportation Program funds are not intended to fund ongoing program operations. Agencies should propose non-infrastructure projects that meet the ATP guidance and are sustainable by the agency in the future.
- RFQ/RFP/PIF must be utilized for all consultants. Consultants include but are not limited to experts for walk audits, evaluation-related expenses, League-Certified Instructors, education and outreach consultants, etc.
- Competitive bid / small procurement procedures must be utilized as appropriate.

Operating Expenses	Items
Staff and Benefits	<p>Reasonable part time or full time staff needs (local agency and/or consultants):</p> <ul style="list-style-type: none"> <li>• Salaries and benefits for agency staff needed to support an ATP NI project.</li> <li>• Costs to engage the services of a consultant (either non-profit or for-profit) to support an ATP NI project.</li> </ul> <p>Examples include:</p> <ul style="list-style-type: none"> <li>• Salaries and benefits for a SRTS Program Manager. A Program Manager is a person that runs an entire city, county, or some other area wide division that includes <i>numerous</i> schools.</li> <li>• Costs to engage the services of a consultant (either non-profit or for-profit) to manage a SRTS program is also covered as described above.</li> <li>• School Coordinator: a person that runs an individual schools SRTS program.</li> <li>• Pay for a substitute teacher if needed to cover for a faculty attending SRTS functions during school hours.</li> <li>• Costs for additional law enforcement around the school or school routes when students are traveling to and from school during normal school hours.</li> <li>• Crossing guard salaries are <u>not</u> an eligible expense. (see Staff Training)</li> </ul>

Staff Training	<ul style="list-style-type: none"><li>• Training if necessary should be limited to the specific area of training needed. Training should utilize available TARC materials as applicable. Examples of acceptable training are: train the trainer; regional training for school staff and volunteers; actual training of students.</li><li>• Training for crossing guards is allowable.</li><li>• General attendance at conferences is not an eligible expense. (See Travel)</li></ul>
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Operating Expenses	Items
Volunteer Expenses (Parents, misc. volunteers, etc.)	<ul style="list-style-type: none"> <li>• Volunteers may be reimbursed for materials and expenses needed for coordination and training efforts. (Example: mileage reimbursement, meals, supplies, and materials).</li> <li>• Volunteers cannot be paid for their time.</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Phone Service (Does not include equipment – see Ineligible Expenses)</li> <li>• Postage/shipping</li> <li>• Webinar service</li> <li>• Website design and maintenance/updates</li> </ul>
Office supplies	Including but not limited to: paper, pens, printer ink, etc.
Travel	<ul style="list-style-type: none"> <li>• Mileage/airfare/hotel/per-diem/parking /taxi fare (For necessary staff travel only, not to be used as an incentive.)</li> <li>• Auto insurance (e.g. to move bicycle fleets).</li> <li>• General attendance at conferences is not an eligible expense.</li> <li>• Out of State travel is not an eligible expense.</li> <li>• Travel should conform to State or the responsible agency reimbursement guidelines.</li> </ul>
Meeting costs	<ul style="list-style-type: none"> <li>• Meeting/training rental fees, food for working meals. <i>*Food should be “healthy” and of reasonable cost, an example of reasonable cost is conforming to State reimbursement guidelines including: \$6 breakfast, \$10 lunch, \$18 dinner.</i></li> </ul>
Material Production	<ul style="list-style-type: none"> <li>• Graphic design and printing costs associated with education and encouragement materials.</li> <li>• It is encouraged to use existing SRTS, bike, or pedestrian educational materials already developed for by the National Center for SRTS, the California SRTS Technical Assistance Resource Center, FHWA, and other states. ** See the California SRTS Technical Assistance Resource Center for educational materials and links. <a href="http://www.casaferoutestoschool.org/">http://www.casaferoutestoschool.org/</a></li> </ul> <p>** Expenses to design/develop alternative SRTS/Bike/Pedestrian materials (material already available from the above listed sources must be approved by the Caltrans HQ Safe Routes to School Program Manager. (Exception: school walking and/or bicycling route maps.)</p>
Indirect Costs	<ul style="list-style-type: none"> <li>• Agencies must have an approved Indirect Cost Allocation Plan/Indirect Cost Rate Proposal (ICAP/ICRP) agreement with Caltrans in order to be reimbursed, or</li> <li>• The agency must submit an ICAP/ICRP request in accordance with the options and submission processes found on the Division of Audits and Investigations webpage: <a href="http://www.dot.ca.gov/hq/audits/">http://www.dot.ca.gov/hq/audits/</a></li> </ul>

Operating Expenses	Items
Ineligible Expenses	<p>These types of items are <u>not</u> eligible operating expenses:</p> <ul style="list-style-type: none"> <li>• Cash, Gift Cards, Gift Certificates</li> <li>• Electronic Equipment: (Computers, laptops, iPads/tablets, iPods/MP3 Players, cell phones, smart boards, projectors, printers, or other electronic equipment.)</li> <li>• Similar items</li> </ul>

## **Direct Program Related Expenses**

### **Notes:**

- Purchases must follow local competitive bid / small procurement procedures, which can include receiving multiple (often three) bids to ensure reasonable cost.
- Purchases of items not listed below may be eligible, but must be reviewed and approved by Caltrans in advance of purchase on a project by project basis.
- Unit cost for one item cannot exceed \$50 with the exception of: event insurance, bicycle equipment (as noted), and scanning equipment, all must be “reasonable” costs justified by small procurement procedures.
- Incentives: Allowable incentives are limited to pedestrian and bicycling related educational safety materials. Incentives are classified into two different categories (“Major” and “Minor” items), with different rules and allowances for each category. See tables for additional information. Incentives cannot be purchased for raffles, encouragement, promotional, giveaways, and other similarly intended uses except as allowed herein.
- Equipment: Including bicycles and helmets (see table below) may be provided for use during training and educational events. All equipment purchased for training and educational programs/events (including bike rodeos and/or similar events) are not to be given away. Bicycles & helmets purchased for training/events are intended to be kept and used by the program beyond the life of the project as part of a sustainable ATP program in the community. Helmets should be bought in volume to minimize cost.
- Buy America provisions apply to purchases of iron and steel products and may apply to bicycle purchases. An exception to the Buy America requirement is allowed for purchases of minimal amounts of foreign iron/steel products; this minimal purchase amount is defined as 1/10<sup>th</sup> of 1% of the total contract or \$2500, whichever is greater.  
Buy America requirements do not apply to aluminum or alloy products. Since many bikes are made of aluminum or alloys, some bike purchases may not trigger the Buy America requirements.

Program Related Expenses	Items	Notes
<p><b>Equipment*</b>  <i>* For Training / educational purposes only. These items cannot be used for raffles, incentives, prizes, giveaways, etc.</i></p> <p><i>* Unit cost for one item cannot exceed \$50, unless otherwise noted.</i></p> <p><i>* All costs are excluding tax.</i></p>	<ul style="list-style-type: none"> <li>• Bicycles (See Notes) Bicycle cost is limited to: \$250/bicycle</li> <li>• Bike helmets (See Notes) Helmet cost is limited to \$20/helmet</li> <li>• Bike locks and cables</li> <li>• Bicycle Repair Stand (limited to \$150/stand)</li> <li>• Bicycle Patch kits</li> <li>• Bicycle lights</li> <li>• Bicycle lubricants</li> <li>• Bicycle saddle bags</li> <li>• Bicycle tires / tubes</li> <li>• Tire pumps</li> <li>• Bicycle repair tools</li> <li>• Scanner (limited to \$250/scanner) and related equipment (e.g. Barcode tags and bar code readers for computer-based active transportation data collection efforts). Purchase of computers, laptops, etc., are not included in eligible equipment for this purpose. See Ineligible Expenses.</li> </ul>	
<p><b>Safety gear*</b></p> <p><i>* Allowable for staff, trainers, and volunteers. Gear must be necessary for the staff member to complete the program work/duties.</i></p>	<ul style="list-style-type: none"> <li>• Bike helmets</li> <li>• Rain gear (including umbrellas)</li> <li>• Safety vests</li> <li>• Stop paddles</li> <li>• Safety cones</li> <li>• Identification badges/pins/sashes</li> <li>• Water bottles and/or bottle cages</li> </ul>	
<p><b>Incentives - Minor Items*</b>  <i>*(1) Incentives should be used as rewards for program participation, not given to the entire student body whether or not they participate in a SRTS activity.</i></p> <p><i>*(2) All material must include a safety message.</i></p>	<p>Allowable incentives are limited to pedestrian and bicycling related educational materials.</p> <p><b><u>Minor Items are limited to:</u></b></p> <ul style="list-style-type: none"> <li>• Punch card holders</li> <li>• Scanning tags or punch cards</li> <li>• Award Certificates: (certificates for achievement or participation, not gift certificates)</li> <li>• Healthy snacks</li> <li>• Reflective items</li> </ul>	<p>Total value of incentives should be limited to no more than \$5 per participating individual.</p> <p>Donated incentive items are not included in the \$5 limit.</p>

Program Related Expenses	Items	Notes
<p><b>Incentives– Major Items*</b>  <i>*(1) Incentives – should only be used as reward for outstanding participation or achievement in the SRTS program over the course of a school year.</i></p> <p><i>*(2) Incentives should be used as rewards for program participation, not given to the entire student body whether or not they participate in a SRTS activity.</i></p>	<p><b><u>Major Items are limited to:</u></b></p> <ul style="list-style-type: none"> <li>• Bike helmets* (see also Notes)  Helmet cost is limited to \$20/helmet (excluding tax). Limited to a maximum of 2 helmets/per grade level/per school year/ per school.</li> </ul> <p>Helmets should be bought in volume to minimize cost. Caltrans does not endorse any particular business, and there are many sources for bulk purchases. Some sources that may be helpful are:  HelmitsRus.com  Prorider.com  American Safety/ASHP (Buyashp.com)</p>	<p>Donated incentive items are not included in the limits.</p>
<p><b>Active Transportation Event - Directly Related Expenses*</b></p> <p><i>* Only that portion of the expenses directly related to an awarded ATP project are eligible for reimbursement.</i></p>	<ul style="list-style-type: none"> <li>• Event insurance</li> <li>• Volunteers may be reimbursed for materials and expenses needed for coordination and training efforts. (Example: mileage reimbursement, meals, supplies, and materials). Volunteers cannot be paid for their time.</li> <li>• Costs for additional law enforcement needed for enforcement activities.</li> </ul> <p><u>Supplies including but not limited to:</u></p> <ul style="list-style-type: none"> <li>• Chalk</li> <li>• Chalk marking sticks</li> <li>• Cones</li> <li>• Barriers/Fences for safe bicycle/pedestrian traffic flow</li> <li>• Tables/Chairs for sign-in areas</li> <li>• Shade tents for sun protection</li> <li>• Easels</li> </ul> <p>Supplies must be meet all other expense requirements contained herein.</p>	
<p><b>Educational Materials*</b></p> <p><i>* See also Operating Expenses- Material Production</i></p>	<ul style="list-style-type: none"> <li>• Educational materials must be specific to walking and bicycling. (Transit related items are not an eligible component of ATP projects.)</li> <li>• Curricula (e.g. traffic safety, personal safety, violence prevention)</li> <li>• Walking and/or biking: activity &amp; safety books</li> <li>• Parent tip sheets</li> <li>• Bookmarks – with walking / biking safety messages</li> <li>• Training materials, handouts, flyers</li> <li>• DVDs/movies</li> <li>• Walking School Bus guides</li> </ul>	

Program Related Expenses	Items	Notes
Ineligible Expenses	<p><b>These items are <u>not</u> eligible program expenses:</b></p> <ul style="list-style-type: none"> <li>• Cash, Gift Cards, Gift Certificates</li> <li>• Electronic Equipment (Computers, laptops, printers, iPads/tablets, iPods/MP3 Players, cell phones, smart boards, projectors, heart monitors, or other electronic equipment.)</li> <li>• Bikes for raffles, incentives, prizes, or giveaways.</li> <li>• Skateboards, Scooters</li> <li>• Incentives (Major or Minor) used for non-SRTS events</li> <li>• Incentives intended to reward simply attending events, but not requiring participation in the program.</li> <li>• Similar items</li> </ul>	Not allowed