

# UNIVERSITY OF CALIFORNIA, MERCED

## REQUEST FOR PROPOSAL

RFP # UCM1067DG

### **Transportation Planning and Transit Consulting Services**



Issue Date: October 7, 2013

Mandatory Pre-Proposal Conference: 1:30pm, October 17, 2013 (See Section 2)

Proposal Due Date/Time: 4:00pm, November 7, 2013 (See Section 2)

**RFP Administrator:** Denise Garcia  
Principal Buyer  
University of California, Merced  
Phone: (209) 228-4085  
Email: [dgarcia@ucmerced.edu](mailto:dgarcia@ucmerced.edu)

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## **1 RFP Background and Intent**

### **1.1 Organizational Context**

#### **1.1.1 University of California**

Founded as the state's first and only land grant institution in 1868, the University of California is a system of 10 campuses with approximately 220,000 undergraduate and graduate students. The official research arm of the State of California, UC has five medical schools, four law schools and the nation's largest continuing education program. It also manages three national laboratories that are engaged in energy and environmental research and approximately 130,000 acres of natural habitat in California for research, teaching and outreach activities. The University's fundamental mission is teaching, research and public service.

#### **1.1.2 University of California, Merced**

The University of California, Merced ("UC Merced" or "University") is the nation's first doctoral research university of the 21st century and the newest campus of the University of California system. Opened in 2005, the campus currently has a Fall 2013 enrollment of 6,300 students. The campus significantly expands access to the UC system for students throughout the state, with a special mission to increase college-going rates among students in the San Joaquin Valley, California's fastest growing region. It also serves as a major base of advanced research and as a stimulus to economic growth and diversification throughout the region.

UC Merced has also positioned itself as national leader in sustainability. To date, UC Merced's buildings outperform California Building Code Title 24 by 30%; LEED Gold minimums are mandated, with Platinum targets, for all buildings; the campus uses an extensive monitoring system to track actual energy performance of its built environment; and the newest buildings are designed to be 50% more efficient than typical university buildings in California.

### **1.2 Project Background**

The Long Range Development Plan (2009 LRDP) sets forth a land use plan for a 25,000 student campus and a "Triple Zero Commitment" to achieve zero net energy, zero waste and zero net emissions by 2020. In 2009, the Regents adopted the LRDP for the Merced Campus to accommodate 25,000 students by the year 2030 and detailed the second of four phases to accommodate 10,000 students by 2020 <http://ppdc.ucmerced.edu/our-design-vision/long-range-development-plan>.

To achieve its Triple Zero Commitment target, UC Merced's challenges its consultants, engineers, and designers to exceed best practice solutions with innovative, sustainable solutions. UC Merced is seeking a transportation services consultant that will build on this foundation to help the campus to meet its mobility needs while achieving its zero net emissions goals.

The 2009 LRDP establishes a comprehensive transportation and mobility framework for a fully built out campus. (See 2009 LRDP, Pgs. 84-97) However, as a young campus, multiple mobility and land use related

decisions will be required over multiple phases to achieve the ultimate vision of a zero net emissions, pedestrian and transit oriented campus. The LRDP outlines 22 policies that guide campus transportation planning at UC Merced. These Mobility Policies express the goals and aspirations for UC Merced's vehicular, pedestrian, transit and bicycle networks. (See 2009 LRDP, Pg. 96).

The LRDP's Mobility policies are strategically integrated with related land use, infrastructure and sustainability policies. Upcoming phases of development, such as the "2020 Project," ( <http://2020project.ucmerced.edu> ) are an opportunity to bolster the University's sustainability track record with transportation and mobility approaches that meet user needs, reduce emissions impact and help nurture a transit, pedestrian, bicycle and low emissions-based culture.

Under the 2009 LRDP, the Phase 2 projects were anticipated to be developed on approximately 355 acres and to be completed by 2020. By that time, the campus would contain approximately 2.5 million square feet of academic space, 5150 beds of on-campus housing, and 5050 parking spaces.

At present, the campus does not have enough space for its current enrollment in all categories of space and is faced with a growing gap between strong student demand for admission to UC Merced and the campus' limited physical capacity to accommodate that demand. Development of the facilities necessary to accommodate 10,000 students is critical to the success of the Merced campus and its economic viability, and also to the ability of the University of California to provide access to eligible students.

In May 2013 the Regents of the University of California (the "Regents") amended the LRDP to implement the remainder of the original 2020 Project as a single master-planned development. The 2020 Project includes all of the remaining facilities originally described in the 2009 LRDP, but would provide them on a smaller number of acres. In addition, the campus submitted for Regents approval an amendment to the 2009 LRDP that would create the planning framework to provide greater land use flexibility to design and deliver a master-planned development. The LRDP amendment created a Central Campus District and adds a new "Campus Mixed Use" ("CMU") land use designation.

The 2020 Project represents the ensuing phase of development of the Merced campus and constitutes what was envisioned as the next portion (Phase 2) of the long-term development proposed under the 2009 LRDP. The 2020 Project includes the facilities needed to support an enrollment level of 10,000 students, including academic, administrative, research, and recreational buildings, student residences and student services buildings, utilities and infrastructure, outdoor recreation areas, and associated roadways, parking, and landscaping. For more detail on the revised 2020 Project see <http://2020project.ucmerced.edu>.

The campus currently has five major capital projects under development, in either the construction or planning stage. When these buildings are completed the campus will include approximately 1.1 million gross square feet<sup>1</sup> of academic and support space and 1693 built beds of on campus housing, located on the Phase 1, 104-acre site, owned in fee by the Regents of the University of California.

The UC Merced 2020 Project will enable build out to a total of 2.5 million gross square feet of academic and support space plus a total 5,000 beds of on campus housing to support an enrollment level of 10,000 students located on a 219 acre site. The project will also include utilities and infrastructure, outdoor

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<sup>1</sup> The 1.1 million GSF does not include square footage for student housing.

recreation areas, and associated roadways, parking, and landscaping. The break out of the square footage of each type of space is still being determined.

UC Merced, in order to meet its near and intermediate-term needs, must also continue its transportation/transit and parking planning program to keep pace with serving the ongoing development of the campus. These efforts would include, but are not limited to, transit service planning, sustainable near term circulation and parking planning support, and assisting the campus in defining the transportation/transit and parking requirements as the 2020 Project evolves. On-call support during the 2020 Project development process would also be included in these efforts.

Currently, a separate but related study is underway that focuses on the traffic impacts that would occur as a result of the 2020 Project built-out. By design, the data generated by the traffic impact study will be used to inform the aspects of the scope of services noted in Section 3 of this RFP. The traffic impact study is scheduled to be completed by November 2013.

For further information please see links to:

UC Regents March Item: UC Merced 2020 Project:

<http://regents.universityofcalifornia.edu/regmeet/mar13/gb1.pdf>

UC Regents May Item:

<http://regents.universityofcalifornia.edu/regmeet/may13/gb5.pdf>

Online Announcement following May Regents meeting:

<http://www.ucmerced.edu/news/development- plans-amendment-endorsed-uc-board-regents>

2020 Project Website

<http://2020project.ucmerced.edu>

2009 LRDP

<http://ppdc.ucmerced.edu/our-design-vision/long-range-development-plan>.

UC Merced Climate Action Plan

<http://sustainability.ucmerced.edu/>

UC Merced Sustainability Strategic Plan

<http://sustainability.ucmerced.edu/>

### **1.3 Intent**

The University of California, Merced invites proposals from transit service and transportation planning consultants to furnish professional consulting services that will assist the University with the implementation of the transportation goals, objectives, and performance standards to meet both current and long term transportation needs. This support shall include current transit operations, the 2020 Project and the campus LRDP, in accordance with the terms, conditions, and requirements set forth in this Request for Proposal (RFP).

## 2 Instructions to Consultants

### 2.1 Mandatory Pre-Proposal Conference

A mandatory pre-proposal conference will be held on Thursday, October 17 at 1:30 PM (PT).

***ATTENDANCE IS MANDATORY. All prospective Consultants must attend this pre-proposal conference to be qualified to submit a proposal. Proposals received from any Consultants that did not attend this conference will be considered non-responsive and rejected upon receipt of proposal.***

The purpose of this pre-proposal conference will be to clarify the contents of this RFP in order to help ensure a thorough understanding of the University's requirements. This pre-proposal conference will provide an opportunity for questions from participants and a forum by which interested parties will have equal access to relevant RFP information prior to proposal submission.

Parking is limited on the UC Merced campus but will be provided for those who RSVP no later than 12:00 Noon (PT) on Monday, October 14. Carpooling is encouraged. Please RSVP via email with a subject line of "RFP# UCM1067DG RSVP" to Denise Garcia at [dgarcia@ucmerced.edu](mailto:dgarcia@ucmerced.edu).

After receipt of your RSVP, an email will be sent to you with information about the location of the meeting and where you may park.

### 2.2 Issuing Office and University Contact

This RFP is being issued by the University Procurement Department which is the only office authorized to change, modify, clarify, etc., the provisions of this RFP and to award any contract(s) resulting from the RFP.

All communications, including any requests for clarification, concerning this RFP shall be directed to the designated RFP Administrator:

Denise Garcia  
Principal Buyer  
UC Merced  
1715 Canal Street  
Merced, CA 95340

[dgarcia@ucmerced.edu](mailto:dgarcia@ucmerced.edu)

Phone: (209) 228-4085

### 2.3 Schedule of Events

Release of RFP.....October 7, 2013

Mandatory Pre-Proposal Conference .....1:30pm, October 17, 2013

Deadline for Questions regarding RFP.....Noon, October 23, 2013

Proposal Due Date.....4:00pm, November 7, 2013

Anticipated Contract Commencement.....December 1, 2013

*Note: The above dates are subject to change at the option of the University.*

## **2.4 Proposal Receipt**

Proposals are to be addressed and delivered as follows:

One (1) original hardcopy (with separate/sealed pricing) and Seven (7) CDs or USB Drives (without pricing) to:

Denise Garcia  
Principal Buyer  
UC Merced  
1715 Canal Street  
Merced, CA 95340  
Phone: (209) 228-4085

Proposals shall be in a sealed package marked:

Name of Consultant  
RFP Number UCM1067DG  
Date and Time Proposal Due

No telephone, email, or facsimile proposals will be considered. Proposals received after the time for closing will be returned to the Consultant unopened.

## **2.5 Consultant Questions**

Consultants are expected to exercise their best professional independent judgment in analyzing the requirements of this RFP to ascertain whether additional clarification is necessary or desirable before responding. If there are any discrepancies in, or omissions to the RFP, or if there are any questions as to any information provided in the RFP or by any other source, a request must be submitted via email or fax for clarification, interpretation or correction by the date listed above. Such inquiries must be directed to the buyer listed below. The University may be unable to respond to inquiries received too close to the proposal submission deadline to permit a timely and comprehensive reply to all prospective Consultants.

Questions regarding this RFP must be submitted using the attached "Consultant Inquiry Form" no later than 12:00 Noon, October 23, 2013. Please submit via email (preferred) or fax to:



Denise Garcia  
UC Merced Purchasing Department  
Fax : (209) 228-2925  
[dgarcia@ucmerced.edu](mailto:dgarcia@ucmerced.edu)

## **2.6 Restriction on Communications**

Except for the designated contacts listed above, Consultants are not permitted to communicate with University staff regarding this solicitation during the period between the Request for Proposal issue date and the announcement of awards, except during:

- Pre-Proposal Conference.

If a Consultant is found to be in violation of this provision, the University reserves the right to reject their proposal.

## **2.7 Joint or Partnering Proposals**

A joint proposal submitted by two or more Consultants proposing to participate jointly in performance of proposed work may be submitted. To be considered responsive, any such joint proposal must respond to all the requirements of this RFP. However, a single Consultant must be clearly identified as the “Primary Consultant” who will assume primary responsibility for performance of all other joint Consultants and all subcontracts to every level. The Primary Consultant must identify themselves as such and submit the proposal under their company name and signature. If a contract is awarded in response to a joint proposal, the Primary Consultant must execute the contract and all Partner Consultants must verify in writing that the Primary Consultant is authorized to represent them in all matters relating to the contract. At least one of the Consultants must have attended any and all mandatory Pre-Proposal or other meetings. The University assumes no responsibility or obligation for the division of orders or purchases among joint contractors.

## **2.8 Proposal Format and Required Submittals**

Consultants are to provide a written proposal addressing the full scope specified under this RFP.

Proposals shall be submitted in the following format. Proposals in any other format will be considered informal and will be rejected. An individual authorized to execute a formal proposal must sign all proposals. If the Consultant fails to provide any of the following information, the University may at its sole option, ask the Consultant to provide the missing information or evaluate the proposal without the missing information.

Proposals should include all of the elements listed, in 8-1/2 x 11 inch format—no foldouts, clearly indexed and assembled (in accordance with the numbers and order listed below) and reference the corresponding RFP Sections and paragraphs.

1. Table of Contents - Proposals should include a table of contents with page numbers with sufficient detail to facilitate easy reference to all requested information.
2. Signed Proposal Certification - RFP Section 8.
3. Consultant Information and Narrative Response - RFP Section 4.
4. Terms and Conditions Acceptance - Indicate acceptance/compliance with all items in RFP Section 5.
5. Supplementary Information and Additional Comments as desired.
6. Cost Sheet - RFP Section 7. (Note: Do not provide costs in any section of your proposal/response other than in Section 7 and include in separate envelope with original hardcopy proposal only.)

## **2.9 Proposal Modifications or Withdrawal**

No modification of submitted proposals will be permitted in any form. Any proposal may be withdrawn prior to the time set for the receipt of proposals.

## **2.10 Consultant Representation**

Each Consultant, by submitting a proposal, represents that he/she has:

- Read and completely understands the RFP and associated documents.
- Based the proposal upon the requirements described in the RFP.

## **2.11 Complete Proposals**

All proposals must be full and complete at the time of proposal opening.

## **2.12 Amendments to RFP before Due Date**

No individual is authorized to amend any part of this proposal in any respect, by an oral statement, or to make any representation of interpretation in conflict with provision of this RFP prior to the proposal submission date. However, if necessary, supplemental information in addenda form will be made available to all prospective Consultants who have received this RFP from the University Purchasing Department. Failure of any Consultant to receive such addenda shall not relieve the Consultant from any obligation under their proposal as submitted. All addenda so issued shall become part of this RFP.

### **2.13 Firm Proposals**

All Proposals shall be firm and fixed for 90 days following the deadline for RFP submissions, or until a contract is signed, whichever comes first.

### **2.14 Minimum Qualifications**

Consultants must:

- Be able to demonstrate the capability of providing the required services by possessing adequate available resources, including personnel, facilities, production, access, equipment, systems, organization structure, operation controls, quality control, and other related factors.
- Have the ability to obtain the necessary insurance (ref.: Section XI of the attached sample Professional Services Agreement).
- Possess all professional or business licenses as may be required by the work contemplated by this RFP.
- Operate within the guidelines of all federal and state labor codes.
- Have experience in developing sustainable transportation plans and programs as well as standards for performance.

In addition to the information required above, University may request additional information either from the Consultant or others, and may utilize site visits and Consultant presentations, as reasonably required by the University to verify the Consultant's ability to successfully meet the requirements of this RFP.

### **2.15 Post-Qualification and Consultant Interview or Site Visit**

All Proposals submitted from Consultants, who have not been pre-qualified, as a supplier to the University will be subject to post-qualification. Qualified status is based on such factors as financial resources, past performance with the University of California, delivery capability, experience, organization, personnel, technical skills, operations controls, equipment, facilities, quality control and other related factors which may be an indicator of a Consultant's ability to perform.

### **2.16 Proposal Preparation Costs**

All costs incurred in the preparation and submission of proposals and related documentation, including Consultant presentations to UC, will be borne by the Consultant.

### 3 Program Requirements

This section sets forth the scope of services required. Proposals must address all of the listed requirements in the order presented with a response acknowledging an understanding of the requirements and the Consultant's approach to fulfilling the requirements.

#### 3.1 Scope of Services

The University wishes to engage a qualified consultant to provide professional services in the assessment of transit, parking, and fleet operations of the UC Merced campus. Consultant will assist in the development of strategic performance criteria and plan for the near term and intermediate term which will be inclusive of the needs of the 2020 Project (<http://2020project.ucmerced.edu>) via the development of a sustainable transportation, parking, and fleet strategy. The plan will include an execution and implementation plan for the near term for transportation and transit planning in support of delivery of the 2020 Project.

The scope of services is divided into four distinct categories which will require specific professional expertise and experience. For each category, UC Merced will be engaging the consultant based on the consultant's qualifications, expertise, performance outcomes and budget considerations. UC Merced reserves the right to add, modify and/or delete categories or tasks related to a given category.

##### 3.1.1 Category 1: Transit Service, Near-term Circulation, Fleet and Parking Planning Support

The consultant will work with UC Merced to review the current campus and community transit operations and passenger usage and will assist UC Merced in adjusting the service model to better serve the near-term and mid-term growth of the campus through the following work items:

- Review the existing CatTracks transit system network to determine if the system currently operates efficiently and if it can accommodate anticipated future growth;
- Evaluate transit service provision options and evaluate trade-offs between outsourcing transit operations and controlling the operations internal within the campus and determine the viability of a UC Merced owned and operated transit system. Recommendations to include the physical requirements for construction for a Transit vehicle service center;
- Evaluate and provide planning and performance criteria for location of a long-term transit center or transit stops on campus;
- Develop a set of performance measures for evaluating future campus transit center/stop locations;
- Develop recommendations for transit service improvements for the transportation network and system;
- Develop and prepare a report with recommendations for transportation improvements and transportation findings in a final report; and

- Develop a forecast of future transit ridership based on existing transit demand, existing campus mode share, and projected campus growth and make recommendations on future service levels and potential service enhancements to be provided by CatTracks.
- Develop a best practices recommendation for fleet vehicle recharges based on consultation with UC Merced Athletics, UC Merced Housing, UC Merced Dining, UC Merced Sierra Nevada Research Institute, UC Merced Facilities Management and UC Merced Transportation and Parking Services (TAPS). Develop recommendations for the servicing of Fleet Vehicles, addressing if and when the University should in house this work or if it should continue to outsource it. Recommendations to include the physical requirements of a service facility, for inclusion into the 2020 Project.
- Develop a selection list of vehicles as is appropriate and sustainable to perform the business of UC Merced.
- Develop “Green Fleet” strategies to reduce carbon footprint and operating costs, and model sustainable fleet operations for the Central Valley
- Identify possible funding sources for supporting those objectives (Federal, State or otherwise)

### **3.1.2 Category 2 - Campus Traffic Demand Study and Analysis**

The consultant will provide transportation planning services that include conducting technical traffic studies and preparing analysis for traffic demands for the campus that include the following work items:

- Conduct traffic counts at designated locations for specified consecutive dates and starting on a date designated by UC Merced;
- Prepare memo describing the spring 2014 campus trips by mode; and
- Develop a strategy for implementing the campus traffic mitigation program as identified in the EIR for the 2009 Long Range Development Plan (LRDP).

### **3.1.3 Category 3 - 2020 Project Transportation Planning**

- Develop a multi-modal trip generation profile for the campus;
- Develop phased performance criteria for the extension, widening, and possible re-alignment of roadways to serve the 2020 Project parking garages and lots, transit users, bicycle users, pedestrians, new buildings, service vehicles, and emergency vehicles;
- Coordinate and develop phased performance criteria for transit bus route and stop location changes;
- Develop phased performance criteria and identify changes and extensions to the pedestrian and bicycle circulation systems and amenities (e.g. storage, shelter), to be coordinated with the roadway, existing campus and community bike networks, transit and parking lot changes;
- Recommend Transportation Demand Management strategies to reduce the percentage share of single occupant vehicles;

- Develop phased performance criteria for the location and size of existing and new parking lots, to provide convenient access for drivers while also considering accommodation of future building footprints and other planning considerations;
- Develop phased performance criteria for the design and timing of capacity improvements at the Lake Road/Bellevue Road intersection, which is affected by the distribution of parking, the pace of campus population growth, the level of transit use, and other factors;
- Develop phased performance criteria for identifying the ideal timing of planned capital improvements to the proposed circulation loop beginning at Ranchers Road/Lake Road to Fairfield Canal; and
- Provide an analysis and develop success criteria for a sustainable transportation plan, and prepare a memo on the transportation system requirements for the 2020 Project that considers the following factors:
- Multi-modal transportation circulation and network access capacity;
  - Best practice multi-modal roadway, wayfinding and traffic calming design and connectivity to accommodate various means of mobility including pedestrians, bicycles, articulated buses, emergency service access (e.g. fire trucks);
  - An approach to on-street parking in both the near and long term;
  - Parking distribution on campus including future building footprint preservation via parking lot land banking, and transition from parking lots to building structures; or from linear lots to future streets;
  - Best Practice parking lot and structure design, space size and configuration standards including implementation of gate arms, lighting, pavement surface type selection and electronic signage.;
  - Zero Net Emissions targets and monitoring strategies;
  - Pedestrian and bicycle circulation and amenities;
  - Transit routes and stops, including maximum walking distances;
  - Analyze campus fleet and the right size to meet departmental business operational and campus rental vehicle needs;
  - Assess campus parking business model;
  - Alternative Transportation incentives to reduce single occupant vehicle demand; and
  - Capacity and circulation success criteria for non-campus related buses; and
  - Transportation Demand Management strategies to reduce parking demand on and off campus.

#### **3.1.4 Category 4 - 2020 Process Assistance**

The consultant will assist UC Merced in preparing the qualifications requirements for the transportation team members on teams responding to the RFQ and RFP, including items such as relevant project experience, project staff descriptions, certifications, references, etc.

## **4 Consultant Information & Narrative Response**

The University believes that the previous experience, financial capability, expertise of personnel, and related factors are important in assessing the Consultant's potential to successfully fulfill the requirements defined in this solicitation

Accordingly, prospective firms must conform to minimum qualification standards and provide the required information in order to be considered for award.

Please respond to each point below in your proposal noting the section and item number.

### **4.1 Company Profile**

- 4.1.1** Provide the contact information for the person responsible for your proposal.
- 4.1.2** Provide an introduction, executive summary and brief history of your firm and the practice pertaining to the delivery of services included in this RFP.
- 4.1.3** Overview of the work you do/have done in higher education.
- 4.1.4** Identify the team, key consultants for this project.
- 4.1.5** Complete and submit the attached University's Business Information Form.
- 4.1.6** Provide a copy of your audited financial statements for the last two years. (Note that this is only required with the "original" hard copy of your proposal.)

### **4.2 Background and Experience**

Provide information regarding your firm's background, market expertise and experience as it relates to our initiative, and how it will benefit the University to contract with your firm. Please address each of the following items below in your response. Be specific, do not include general information. Offer focused paragraphs by topic (i.e., transportation/transit planning & design; technical aspects; sustainability; etc.)

- 4.2.1** Demonstrated excellence in the preparation of transportation/transit planning and performance criteria specific to the areas identified in Section 3.1
- 4.2.2** Names of colleges and universities you have worked with including any current or previous University of California engagements (including Institution name, contact person, phone and email address). Provide overview of projects accomplished that are similar in size and scope.

- 4.2.3** Data sets, benchmarks and best-practice data you have access to that can benefit UC Merced in this initiative.
- 4.2.4** Demonstrated experience working with multiple stakeholders in a master integrated planned project, including the owner's project team and sub-consultants;
- 4.2.5** Demonstrated experience knowledge and practice of "Best Practices" determined by actual knowledge and experience on major transportation/ transit projects;
- 4.2.6** Demonstrated experience in successfully identifying and resolving potential issues on projects that would have impacted the delivery projects of similar size and scope to the UC Merced 2020 Project;
- 4.2.7** Demonstrated experience in the public sector, specifically working with developing public universities and other entities;
- 4.2.8** Demonstrated successful performance in sustainable transportation planning and projects.

### **4.3 Relevant Project Experience**

- 4.3.1** Briefly state relevance for each project.
- 4.3.2** Specify role of the firm or individual if work was not exclusively by the firm (i.e., joint venture, association); if work was done by individuals on the project team while with other firms, this must be clearly stated,
- 4.3.3** Provide a list of the following for the project:
  - Project name and location
  - Project milestone dates (including planning phase, design phase, delivery dates.)  
(Note: Projects that are currently in design are acceptable, but completed projects are of particular interest.)
  - Square footage/Scale
  - Overall project costs, including cost/project elements (i.e. transportation, transit elements, etc.)
  - Main program elements
  - Sustainable characteristics of the project/plan
  - Owner name with name of contact person



#### **4.4 Project Team Summary**

Identify key team members, state their qualifications relevant to programming services and the scope of this project and create a matrix showing which relevant projects the proposed team members have worked on together, with the first project being the most relevant. Include any professional licenses the team members and/or sub consultants hold. The University is interested in seeing what relevant projects the proposed team has worked on, as well as, what projects the team members have worked on together.

#### **4.5 Sub-Consultants**

Consultant must provide information about any sub-consultants who will perform work on this project. Include the sub-consultant profile and information about their experience.

NOTE: Consultant must identify themselves as the Primary Consultant and submit the proposal under their company name and signature. If a contract is awarded to a consultant with sub-consultants, the Primary Consultant must execute the contract and the sub-consultants must verify in writing that the Primary Consultant is authorized to represent them in all matters relating to the contract. The University assumes no responsibility or obligation for the division of work, contracts, purchases, or payment among the Primary Consultant and their sub-consultants.

#### **4.6 Proposed Timeline and Work Plan**

Submit a timeline and work plan to accomplish the scope of work defined in this Request for Proposal. The work plan should identify the team member(s) involved and describe for each task your firm's approach to meeting the scope and schedule of that task.

If possible, please forecast a completion date for the project if this work should begin December 1, 2013.

## **5 Terms and Conditions**

### **5.1 Professional Services Agreement**

The terms and conditions governing any contract resulting from this RFP shall be pursuant to those contained in this document as well as those contained in the “University of California Professional Services Agreement” (PSA) sample attached and University of California Appendix DS, (terms and conditions for data privacy and security).

### **5.2 University of California Employees**

All proposals must indicate any/all known University of California employees and/or near relatives who hold a position in your organization or have been engaged as a consultant for your organization within the last two years. Also indicate any known University of California employees or near relatives that own or control more than a ten percent (10%) interest in your organization.

### **5.3 Conflict of Interest**

- Consultant shall not hire any officer or employee of the University to perform any service covered by this agreement.
- Consultant affirms that to the best of her knowledge there exists no actual or potential conflict between Consultant's family, business, or financial interest and the service provided under this agreement, and in the event of change in either private interests or service under this agreement, any question regarding possible conflict of interest which may arise as a result of such change will be raised with the University.
- Consultant shall not be in a reporting relationship to a University employee who is a near relative, nor shall the near relative be in a decision-making position with respect to the Consultant.

### **5.4 University's Right to Reject or Modify**

Selection of a proposal does not mean that all aspects of the proposal(s) are acceptable to the University. The University reserves the right to negotiate the modification of the proposal terms and conditions prior to the execution of a contract, to ensure a satisfactory procurement.

### **5.5 Supplemental Terms and Conditions/Modifications**

Any supplemental terms or conditions, or modification or waiver of these terms and conditions must be in writing and signed by Consultant and University.

## **5.6 Disclosure of Records**

All proposals, supporting materials, and related documentation will become the property of the University.

This RFP, together with copies of all documents pertaining to any award, if issued, shall be kept for a period of five years from date of contract expiration or termination and made part of a file or record which shall be open to public inspection. If the response contains any trade secrets that should not be disclosed to the public or used by The University for any purpose other than evaluation of your approach, the top of each sheet of such information must be marked with the following legend:

### **“CONFIDENTIAL INFORMATION”**

All information submitted as part of the proposal must be open to public inspection (except items marked as trade secrets and considered trade secrets under the California Public Records Act) after the award has been made. Should a request be made of The University for information that has been designated as confidential by the Consultant and on the basis of that designation, the University denies the request for information, the Consultant may be responsible for all legal costs necessary to defend such action if the denial is challenged in a court of law.

## **5.7 Form of Agreement**

The contents of this RFP (including the attached appendices as appropriate), RFP Addenda, and the proposal document of the successful Consultant shall become contractual obligations as part of the Contract if acquisition action ensues. Failure of successful Consultant to accept these obligations in a contractual agreement shall result in cancellation of award. The University reserves the right to negotiate provisions in addition to those stipulated in this RFP or proposed by Consultant for the purpose of obtaining the best possible offer.

## **5.8 Performance Standard**

All work performed shall be first-class in every respect and shall conform to the highest standards of the industry.

## **5.9 Marketing References**

The successful Consultant shall be prohibited from making any reference to University, in any literature, promotional material, brochures, or sales presentations without the express written consent of the University.

#### **5.10 Proprietary Information**

Any restrictions on the use of data contained in a proposal must be clearly stated in the proposal itself. Proprietary information submitted in response to the Request for Proposal will be handled in accordance with applicable University of California procurement regulations the Public Records Act. Data contained in the proposal, all documentation provided therein, and innovations developed as a result of these contractual services cannot be copyrighted or patented by Consultants. All data, documentation, and innovations become the property of the University.

#### **5.11 Insurance Requirements**

Prior to the commencement of any work under this contract, the Consultant shall provide evidence of current insurance pursuant to attached University of California PSA, Section XI.

#### **5.12 Audit Requirement**

Any agreement resulting from this RFP shall be subject to an examination and audit by the University and the State of California for a period of three (3) years after final payment. The examination and audit shall be confined to those matters connected with the performance of the agreement, including but not limited to the costs of administering the agreement.

#### **5.13 Terms Included and Order of Precedence**

In submitting a proposal in response to this RFP, Consultant acknowledges that this RFP, including all appendices and attachments, and including service, financial and program specifications and terms and conditions will be incorporated in its entirety in any award issued in response to this RFP. Other documents to be incorporated in the Agreement shall include the Consultant's entire proposal, including all brochures, attachments and supplementary information. However, in the event of any conflict between the RFP and the proposal, the terms of this RFP shall control, and govern any matter set forth therein that is not explicitly modified, added or deleted by the provisions of the subsequent Agreement.

## **6 Method of Award**

### **6.1 Proposal Evaluation**

This solicitation, the evaluation of proposals, and the award of any resulting contract shall be made in conformance with applicable University policies and State of California law. The University reserves the right to withdraw this Request for Proposal at any time. All documents submitted to UC on behalf of this RFP will become the exclusive property of the UC system and will not be returned.

The University will examine each proposal to determine the effectiveness of the proposal in meeting its requirements. In addition to the materials provided in the proposals, the University may request oral presentations and/or additional information.

Factors that will be used to evaluate proposals include:

- General Quality and Adequacy of Response
- Methodology and Approach
- Breadth and Depth of Relevant Experience
- Quality of Key Personnel Proposed for this Contract
- Resources and Service Commitments
- Proposed Timeline/Ability to Complete Project in a Timely Manner
- Cost Proposal and Payment Terms

Any contract(s) resulting from this Request for Proposal will be awarded to the responsive and responsible Consultant whose proposal, in the opinion of the University, offers the greatest benefit to the University when considering the total value to be delivered, including, but not limited to, the quality of professional services offered and the total cost of the contract to the University.

### **6.2 Contract Award in Best Interest**

The University and/or University reserves the right to accept or reject proposals on each item separately or as a whole, to reject any or all proposals without penalty, make multiple awards or no award, to waive any informalities or irregularities therein, and to contract as the best interest of the University may require in order to put an agreement in place which best meets the needs of the University, as expressed in this RFP. The University reserves the right to negotiate the modification of proposed prices, terms and conditions with the Firm offering the best value to the University, in conjunction with the award criteria contained herein, prior to the execution of a contract to ensure a satisfactory contract.

### **6.3 Consultant Reference Checks**

The evaluation committee reserves the right to contact, interview and evaluate the Consultant's references; contact any Consultant to clarify any response; contact and interview any current users of a Consultant's services; solicit information from any available source concerning any aspect of a proposal; and seek and review any other information deemed pertinent to the evaluation process.

## **7 Cost Sheet**

### **7.1 Compensation**

The University expects to award this business to a single Firm.

Cost proposals should include anticipated reimbursable travel costs and other out-of-pocket expenses. Please provide these expenses as a separate line item(s).

Provide the following pricing information:

- 7.1.1** Total Cost Not To Exceed. Please provide a breakdown of costs by Scope of Work Category for all services proposed. Include anticipated hours/rate per key personnel.
- 7.1.2** Provide your rate card for additional services that may be contracted for, but are not included under the scope of this RFP.

### **7.2 Price Protection**

All prices and rates quoted shall be firm through the contract term.

### **7.3 Invoicing and Payment**

The UC's payment terms are Net 30. A Progress payment schedule based on milestones will be negotiated with the successful consultant.

### **7.4 Expenses**

The University requires the selected Consultant to comply with the University of California Policy G-28, Travel Regulations. The current policy can be found at <http://policy.ucop.edu/doc/3420365/BFB-G-28>.

## 8 Consultant Certification/Signature Page

**AUTHORIZED SIGNATURE:** The proposal must be signed with the full name and address of the Consultant; if a co-partnership, by a member of the firm with the name and address of each member; if a corporation, by an authorized officer thereof in the corporate name.

As a Consultant of goods and services to the University, I/we certify that racially segregated facilities will not be maintained nor provided for employees at any establishment under my/our control, and that I/we adhere to the principals set forth in Executive Order 11246 and 11375, and undertake specifically to maintain employment policies and practices that affirmatively promote equality of opportunity for minority group persons and women, to take affirmative steps to hire and promote women, to take affirmative steps to hire and promote women and minority group persons at all job levels and in all aspects of employment, to communicate this policy in both English and Spanish to all persons concerned within the company, with outside recruiting services and the minority community at large to provide the University on request a breakdown of our total labor force by ethnic group, sex, and job category, and to discuss with the University our policies and practices relating to our affirmative action program.

The below-named individual, submitting and signing this proposal, verifies that he/she is a duly authorized officer of the company, and that his/her signature attests that all items and conditions contained in this Request for Proposal, for Proposal number UCM1067DG are understood and accepted.

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**DATE**

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**AUTHORIZED SIGNATURE**

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**COMPANY NAME**

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**PRINTED NAME OF AUTHORIZED SIGNATURE**

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**ADDRESS**

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**EMAIL ADDRESS**

---

**CITY/STATE/ZIP CODE**

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**AREA CODE AND TELEPHONE NUMBER**

## **9 Attachments**

- Consultant Inquiry Form
- Professional Services Agreement (Sample)
- University of California Appendix DS (Data Security and Privacy)
- Business Information Form
- Merced 2020 Project Map
- Long Range Development Plan Map