



RFP 17/18-08

Request for Proposals

for the redesign and upgrade of the San Francisco County Transportation Authority website

| Date Issued | Proposals Due | Expected Duration | Budget | DBE/SBE/LBE Goal | Contact |
|------------------|--------------------------------|-------------------|-----------|------------------|--|
| January 12, 2018 | February 12, 2018 at 2:00 p.m. | One year | \$120,000 | 5% | Steve Stamos Management Analyst 415.522.4817 steve.stamos@sfcta.org |

SECTION I – NOTICE

Notice is hereby given that the San Francisco County Transportation Authority (Transportation Authority) is requesting proposals from qualified respondents (proposers) to redesign and upgrade the Transportation Authority's website.

Although a pre-proposal conference will not be held, questions may be submitted in writing on or before deadline, by e-mail (info@sfcta.org) or mail to the Transportation Authority; please include "RFP 17/18-08 – Website Redesign and Upgrade Services" in the subject line. The Transportation Authority's responses will be posted to www.sfcta.org/contracting by the date indicated in the schedule, and any addenda to the RFP will also be made available on that webpage prior to the proposal due date. Please see Section II for all important dates and deadlines.

SECTION II – SELECTION PROCESS SCHEDULE

| Date | Phase/Item Due |
|--|---|
| January 12, 2018 | Release of RFP |
| January 18, 2018 5:00 p.m. | Proposers to submit written questions to Transportation Authority |
| January 24, 2018* | Transportation Authority issues written responses to questions |
| February 12, 2018 2:00 p.m. | Responses to RFP and cost proposals due. Late submissions will not be accepted and will be returned unopened. |
| February 15, 2018* | Invitation(s) to interview issued to short list of proposers* (if necessary) |
| February 20-21, 2018* | Interviews* (scheduled if necessary) |
| February 28, 2018* | The selection committee's recommendation to Citizens Advisory Committee for award |
| March 13, 2018* | Recommendation to Transportation Authority Board for award |

**Subject to change*

SECTION III – BACKGROUND

The Transportation Authority was created in 1989 by the voters of the City and County of San Francisco (City) to impose a voter-approved transaction and use tax (i.e., sales tax) of one-half of one percent to fund essential traffic and transportation projects as set forth in the San Francisco County Transportation Expenditure Plan (Prop B Expenditure Plan) for a period not to exceed twenty years. Beginning in April of 1990, the State of California Board of Equalization started collecting the sales tax revenues for the Transportation Authority. In November 2003, San Francisco voters approved a new 30-year Expenditure Plan (Prop K Expenditure Plan) that superseded Prop B, and continued the one-half of one percent sales tax.

The Transportation Authority Board consists of the eleven members of the Board of Supervisors (BOS) of the City, who act as Transportation Authority Commissioners; nonetheless, pursuant to California Public Utilities Code Section 131000 et seq., the Transportation Authority operates as a special purpose governmental entity, independent of the City.

The Transportation Authority is designated under State law as the Congestion Management Agency for San Francisco County. In this capacity, the Transportation Authority has a wide range of responsibilities which include preparing the long-range County-wide Transportation Plan, prioritizing state and federal transportation funds designated for San Francisco, developing and operating a computerized travel demand forecasting model, and implementing the state-mandated Congestion Management Program. The Transportation Authority is also the designated San Francisco Program Manager for the Transportation Fund for Clean Air Program, a state-mandated program that collects an annual vehicle registration surcharge and allocates the funds to transportation projects that improve air quality.

On November 2, 2010, San Francisco voters approved Proposition AA, establishing a new \$10 vehicle registration fee on motor vehicles registered in the City and designated the Transportation Authority as administrator of the fee. Revenues are used for local road repairs, pedestrian safety improvements, and transit reliability improvements throughout the City in accordance with the voter-approved Expenditure Plan.

On April 1, 2014, the BOS adopted a resolution designating the Transportation Authority as the Treasure Island Mobility Management Agency (TIMMA) to implement elements of the Treasure Island Transportation Implementation Plan (TITIP) in support of the Treasure Island/Yerba Buena Island Development Project. The TITIP calls for, and TIMMA will be responsible for implementing, the Treasure Island Mobility Management Program: a comprehensive and integrated program to manage travel demand on Treasure Island as the development project occurs, including an integrated congestion pricing program with vehicle tolling, parking pricing, and transit pass components Assembly Bill 141 (Ammiano), signed in 2014, established TIMMA as a separate entity, providing a firewall between TIMMA and the Transportation Authority's other functions.

Project Background and Purpose

The Transportation Authority is seeking to implement a redesign and upgrade of the agency's website: <http://www.sfcta.org/>.

The Transportation Authority uses its website to achieve several goals, including:

- Showcasing the agency's plans, programs, and project delivery efforts.

- Serving as a resource for San Francisco transportation issues, data and topics.
- Informing the public and other stakeholders about ways to get involved in – and give feedback about – the agency’s work.
- Distributing copies of reports, press releases, notifications and other documents.

The consultant shall make the Transportation Authority’s website a showcase of functionality and design. The consultant shall use U.S. Web Design Standards as a base for the design of the new website.

The consultant will (not in order of priority):

1. Create compelling web design based on agency input
2. Deliver a fully-functioning website based on the agency’s goals and objectives
3. Create a website that allows for ease of social media interaction
4. Create a website that allows for other agency online tools to be embedded within the main site (e.g. MyStreetSF (www.sfcta.org/mystreetsf-projects-map), TNCs Today (tncstoday.sfcta.org/), etc.)
5. Create a website that allows the display of video content from websites such as YouTube.
6. Create a website that is responsive to various screen sizes, including smartphones, tablets and desktop computers
7. Create a website that enables users to easily translate content to languages other than English, such as with Google Translate
8. Create a website that meets current Americans with Disabilities Act requirements
9. Allow for simplicity of use for staff that administer and maintain the content on the site
10. Enable robust and accurate search functionality
11. Incorporate industry standard analytics capabilities on the website, such as Google Analytics
12. Create an online training and user guide/starter kit for the website
13. Deliver detailed documentation of the entire upgrade to allow staff to successfully maintain the website, providing clear and detailed documentation throughout the teardown and upgrade process, including how to migrate content from one environment to another and how to publish it
14. Allow for standard modules for service features such as calendar listings, event registration, surveys, and questionnaires
15. Integrate, test and publish new website
16. Engage with staff to provide regularly-scheduled updates and deliverables, with capacity to be on-the-ground in San Francisco for the duration of the contract
17. Provide a testing environment that will allow for regular updates and modifications to be pushed live for testing, feedback and review

Compatibility: The website developed for the Transportation Authority will be mobile optimized using a responsive design approach. The website will be built to support the modern browsers listed below:

- iOS version 7 and greater
- Android version 4.4 (KitKat) and greater
- Internet Explorer version 11 and greater

- Firefox most recent release (currently v37.x)
- Chrome most recent release (currently v44.x)
- Safari OS X “Mavericks” v10.9 and greater
- Opera

SECTION IV – SCOPE OF SERVICES

The Transportation Authority seeks consultant services to support the redesign and upgrade of its website. The Transportation Authority has budgeted \$120,000 for this contract, including Optional Task 7. Please note this is a ceiling and not a target.

It is anticipated that a contract will be awarded for a 12-month term, with work expected to start in March 2018 and the new website launched by December 2018.

The Transportation Authority does not have office space available for this contract and, with the exception of progress and coordination meetings, all work shall take place at the consultant offices. Proposers should be prepared to mobilize within 48 hours following contract negotiations and contract award by the Transportation Authority Board.

There are six required tasks and one optional task, as detailed below:

Task 1: Project management

Task 2: Site analysis, architecture & content strategy, wire framing and design

Task 3: Theme development and application of design

Task 4: Programming and migration of existing pages

Task 5: Staff training and users guide

Task 6: Transfer to server and site launch

Task 7: Additional enhancements (optional)

Task 1: Project Management

A. Project Management: The consultant has a dedicated project manager on the project. The project manager will be the single point of contact during the entire project duration. The project manager is responsible for insuring all features, budget and scope of the project are met within expectations of the contract. The project manager will schedule recurring meetings to discuss:

- Key Project Indicators
- Project Milestones
- Mitigations
- Comments/Recent Accomplishments
- Issues
- Change Control

Deliverables:

- Monthly invoices by task
- Weekly progress meetings

Task 2: Site Analysis, Architecture & Content Strategy, Wire Framing and Design

A. Scoping and Elaboration: The consultant shall work with the Transportation Authority project team to scope the entire project and to elaborate on any areas that demand more details.

B. Content Strategy: The consultant will touch on the areas below with the Transportation Authority project team.

- Perform research to learn about the Transportation Authority and its website users
- Determine goals and determine how to measure success
- Define target user groups that inform design and functionality decisions
- Perform Inventory & Analysis to audit the current website and uncover opportunities for improvement
- Ensure all web pages support the agency's goals
- Design content to meet the agency's current and future communication goals
- Develop content strategy to help the project team structure and systemize content

C. Wire Framing: The consultant shall create a blueprint for the Transportation Authority website. The wireframes will outline structure and functionality, serving as a skeleton for the website, which will form the foundation of the user experience and site architecture. The wireframes will illustrate how the site will work. The user experience design team will generate everything from low fidelity paper wireframes to high fidelity grey-box wireframes.

D. Graphic Design: The consultant, in coordination with the Transportation Authority, shall design the look and feel of the Transportation Authority site. The consultant shall focus on delivering designs that are visually appealing, clear and long-lasting.

Deliverables:

- Recommendations for changes to existing website content

Task 3: Theme Development and Application of Design

A. Theme Development: The consultant shall apply all designs and layout graphics to the website build. Theme work is all about interpreting the visual aspects of the website. The theme work must be compatible with the latest modern browsers.

Deliverables:

- Development of new design and layout theme

Task 4: Programming and Migration of Existing Pages

A. Website Building: Using the data which has been identified in the Scoping and Elaboration phase (Task 2A), the consultant will build the new website. This entails but is not limited to, content type creation, taxonomy creation and configuration of views and templates. The overall breadth of the development and the development timeline will be scoped and clarified in the Scoping and Elaboration phase of the project.

B. Data Migration: The consultant shall migrate appropriate data to the new website.

Task 5: Staff Training and Users Guide

A. Training: Consultant will set training sessions to train the members of the project team who will be responsible for its management and upkeep.

B. Development of users guide

Deliverables:

- Printed user guides enabling staff to troubleshoot, maintain and update newly launched website.
- In-person training session for staff on how to maintain and update the new website.

Task 6: Transfer to Server and Site Launch

A. Hosting Deployment Assistance: Making the website live on the new hosting provider is a coordinated event which starts during the quality assurance process. This is the on-boarding process. Secure Sockets Layer (SSL) if present is tested prior to launch. Domain Name System (DNS) swap is the mechanism that makes the website live on the new host. Consultant shall work closely with the client team and the hosting provider team to ensure a smooth launch.

Deliverables:

- Launch of publicly accessible website; appropriate security features to protect data integrity while allowing public access

Task 7: Additional Enhancements (optional)

Consultant is invited to identify any additional enhancements related to the appearance or functionality of the website that it would recommend and that could be implemented for a budgeted amount not to exceed \$20,000. This is an optional task. Submissions for this optional task should be included as part of the overall consultant proposal.

SECTION V – RFP RESPONSE REQUIREMENTS: CONTENT AND FORMAT

All proposals should be clear, concise, and provide sufficient information to minimize questions and assumptions. Proposals should be limited to 15 pages (no smaller than 12-point font shall be used and all page sizes greater than the letter size of 8.5” x 11” will be counted as two pages), excluding cover letter, table of contents, the cost proposal, and the following items, which should be included as attachments: résumés, Disadvantaged Business Enterprise (DBE), Local Business Enterprise (LBE), or Small Business Enterprise (SBE) certifications, and required exhibits. The Transportation Authority accepts no financial responsibility for any costs incurred in the preparation of proposals. Upon receipt by the Transportation Authority, all accepted proposals submitted in response to this RFP will become the property of the Transportation Authority.

Time and Place for Submission of Proposals. By the proposal submission deadline, the following must be delivered:

- **Proposal** (written proposal, without cost proposal): one (1) electronic copy (PDF) including all information herein requested. Please clearly specify in the subject line of the e-mail transmittal: “Response to RFP 17/18-08 for Website Redesign and Upgrade Services”.
- **Cost proposal** (in a separate electronic file): one electronic copy (XLS/XLSX format) including all information herein requested. Please name the file: “Cost Proposal for RFP 17/18-08”, and submit along with the proposal.

The proposals must be transmitted electronically to the Transportation Authority at the following address: info@sfcta.org.

All responses must be in writing and identified as to content and be received by the Transportation Authority by the due date. Proposals received later than the above date and time will be rejected.

Cover Letter. Proposers must submit a letter of introduction for the proposal. The letter must be signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal. The cover letter must also include the following content in the format as shown:

| |
|--|
| <p>1. Project Manager (The individual in charge of the scope of services, and who will be the Transportation Authority's contact throughout the contract duration)</p> <p>Name: Title: Address: City, State, ZIP: Phone Number: Email:</p> |
| <p>2. Selection Process Lead (The individual to whom correspondence and other contacts should be directed during the consultant selection process)</p> <p>Name: Title: Address: City, State, ZIP: Phone Number: Email:</p> |
| <p>3. Negotiating Officer (The individual who will negotiate with the Transportation Authority and who can contractually bind the proposer's firm)</p> <p>Name: Title: Address: City, State, ZIP: Phone Number: Email:</p> |
| <p>4. List proposed co-venture arrangements or sub-consultants, if any:</p> <p>1. Company: DBE/LBE/SBE status: Percentage of involvement: Name: Title: Address: City, State, ZIP: Phone Number: Email:</p> <p>2. ...</p> |
| <p>5. <input checked="" type="checkbox"/> This letter is signed by an officer that is authorized to bind the proposer contractually.</p> |
| <p>6. <input checked="" type="checkbox"/> This proposal is firm for a 120-day period from the proposal submission deadline.</p> |

Content. Proposals must contain the following five sections:

1. Proposer Information and Understanding of Project Objectives. In this section, the proposer must provide a discussion demonstrating an understanding of the services to be provided, the challenges for each task, and their significance to the Transportation Authority.

2. Technical and Management Approach. In this section, the proposer must describe its approach to the delivery of the services included in Section IV. This section must (1) reflect proposer's knowledge of, and ability to demonstrate, a sound approach to web design, coding and project management, (2) include a discussion on potential impacts to cost, scope, and schedule based on lessons learned, including any recommendations the consultant proposes to lower and/or control costs given the proposed scope of the project and (3) demonstrate the proposer's knowledge of adjacent projects and their potential impacts to the delivery of the services of this RFP.

Proposer must provide the names and positions of all staff for the proposed team. An organization chart should be included that clearly establishes principal team member firms and sub-consultants, if any. Also identify any specialty sub-consultants that would not necessarily be part of the core team, but would be available on an as-needed basis for specialty support. The proposal should also designate the Project Manager in charge of the scope of services and the Transportation Authority's contact throughout the contract duration. In addition, the proposal should briefly address how the efforts of each of the team members will be coordinated. Proposers should provide a staffing plan with level of effort (e.g., person hours per staff) by task. Do not include budget or rate information in the written proposal; this information should be included in the cost proposal. If the work is to be shared among firms and offices at different locations, indicate where each office is located and what work is to be performed in each office.

Proposals must discuss workload for all key team members, indicating their expected availability, the percentage of their time that will be devoted to the Transportation Authority's contract and any other assurances as to their ability to provide the requested services in a responsive and timely manner. The description of the management approach should address proposed response time standard and how the management and team structure will help to meet those standards.

3. Capabilities and Experience. Proposers must state the qualifications and experience of the proposed team, emphasizing the specific qualifications and experience acquired while providing services similar to those being sought by the Transportation Authority, particularly for the Project Manager and other key project staff members assigned to the Project. Except under certain circumstances beyond the proposer's control, the Transportation Authority will not accept substitutions of key members of the team put forth as part of the winning proposal.

This section must include the following information:

- Names of Project Manager and team members;
- Resumes of all technical personnel to be assigned to work within the scope of services as outlined in Section IV (provide as attachments; resumes will not count toward the page limit);
- Statement of proposer's background and experience related to activities and services being sought through this RFP;
- Brief description of similar projects for which the proposer has provided services during the past five (5) years, including the following information:
 - Client, including reference contact information
 - Project description and location
 - Description of services

- Total value of services provided
- Actual budget performance vs. projected
- Actual schedule performance vs. projected
- Key personnel involved
- Sub-consultants employed

4. Assurances and Miscellaneous Items. In this section, proposals must provide the following information:

- a. Proposers must complete and include the exhibits listed below within the submittal; exhibits required by subconsultants are marked by an asterisk (*). These exhibits do not count toward the page limit; please provide as attachments to proposal. Exhibit samples are attached to this RFP.
 - i. Exhibit A – Terminated Contracts*
 - ii. Exhibit B – Workforce Data Spreadsheets*
- b. Proposers must provide the names, telephone numbers, and e-mail addresses of at least three references, excluding the Transportation Authority. The references should cover work performed by the Project Manager and other key project staff members, should be for work recently performed and similar in nature to the services sought in this RFP. The references must include a brief description of the projects involved, and the roles of the respective team members in successfully completing the project.
- c. Proposers must specify any potential or perceived conflicts of interest which would disqualify its firm from doing business with the Transportation Authority. If proposers are unaware of existing or foreseeable conflicts of interest, a simple statement will suffice. However, proposers should provide a brief description of each apparent, existing or foreseeable conflict of interest, if any. In addition, list all relevant assignments completed for the City and County of San Francisco within the last five (5) years, and any involvement with Transportation Authority-funded projects, to enable the Transportation Authority to identify any possible conflicts of interest.
- d. Proposers must list any political contributions of money, in-kind services, or loans made to any current member of the Transportation Authority Board of Commissioners within the last three (3) years by management positions of the proposed consultant or sub-consultant. If proposers are unaware of any political contributions, a simple statement will suffice. However, if proposers are aware of any political contribution, proposals should include details, such as to whom, what type of contribution, the date and the amount.
- e. Proposers must clearly designate financial submittals or other materials in its submittal, if any, which it in good faith believes to be a trade secret or confidential proprietary information protected from disclosure. See Section IX below, for further details on public disclosure of responses and other materials.
- f. Proposers shall acknowledge receipt and understanding of the following Transportation Authority contracting requirements and state its ability and willingness to comply with each of them in its proposal. The Transportation Authority does not intend to deviate from its standard contract language.

i. **Insurance**

Prior to commencement of work, the Transportation Authority will require the successful proposer to provide evidence of appropriate insurance coverage. The Transportation

Authority's standard contract requires firms to maintain, during the full term of the contract term, insurance in the following amounts and coverages:

- (a) Workers' Compensation, in statutory amounts, with Employers' Liability Limits not less than \$1,000,000 each accident;
- (b) Commercial General Liability Insurance with limits not less than \$1,000,000 each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Contractual Liability, Personal Injury, Products and Completed Operations;
- (c) Commercial Automobile Liability Insurance with limits not less than \$1,000,000 each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Owned, Non-Owned and Hired auto coverage, as applicable; and
- (d) Professional Liability Insurance with limits not less than \$2,000,000 per claim. Sub-consultants providing professional services under this Agreement shall be added to Contractor's policy as additional insured, or shall provide evidence of their own professional liability insurance which is acceptable to the Transportation Authority's Executive Director.

Such coverage must be provided by an insurance company authorized to do business in the State of California. Commercial General Liability and Business Automobile Liability insurance policies must name the San Francisco County Transportation Authority as an Additional Insured and that the policies will not be cancelled or materially changed without thirty (30) days prior notice in writing to the Transportation Authority. Describe if your firm's insurance coverage and amounts meet the above-stated contract limitations.

ii. **Indemnification**

Contractor shall indemnify and save harmless Transportation Authority and its officers, agents and employees from, and, if requested, shall defend them against any and all loss, damage, injury, liability, and claims thereof for injury to or death of a person, including employees of Contractor or loss of or damage to property, resulting directly or indirectly from Contractor's performance of this Agreement, including, but not limited to, the use of Contractor's facilities or equipment provided by Transportation Authority or others, regardless of the negligence of, and regardless of whether liability without fault is imposed or sought to be imposed on Transportation Authority, except to the extent that such indemnity is void or otherwise unenforceable under applicable law in effect on or validly retroactive to the date of this Agreement, and except where such loss, damage, injury, liability or claim is the result of the active negligence or willful misconduct of Transportation Authority and is not contributed to by any act of, or by any omission to perform some duty imposed by law or agreement on Contractor, its subcontractors or either's agent or employee. The foregoing indemnity shall include, without limitation, reasonable fees of attorneys, consultants and experts and related costs and Transportation Authority's costs of investigating any claims against the Transportation Authority.

In addition to Contractor's obligation to indemnify Transportation Authority, Contractor specifically acknowledges and agrees that it has an immediate and independent obligation to defend Transportation Authority from any claim which actually or potentially falls within this indemnification provision, even if the allegations are or may be groundless, false or fraudulent, which obligation arises at the time such claim is tendered to Contractor by Transportation Authority and continues at all times thereafter.

Contractor shall indemnify and hold Transportation Authority harmless from all loss and liability, including attorneys' fees, court costs and all other litigation expenses for any infringement of the patent rights, copyright, trade secret or any other proprietary right or trademark, and all other intellectual property claims of any person or persons in consequence of the use by Transportation Authority, or any of its officers or agents, of articles or services to be supplied in the performance of this Agreement.

iii. **Incidental and Consequential Damages**

Contractor shall be responsible for incidental and consequential damages resulting in whole or in part from Contractor's acts or omissions. Nothing in this Agreement shall constitute a waiver or limitation of any rights that Transportation Authority may have under applicable law.

5. Cost. The cost proposal is not included in page limit, and submitted as a separate electronic file. This contract will be a cost-reimbursement contract, which provides for payment of the successful proposer's allowable incurred costs, to the extent prescribed in the contract. The cost proposal must include a budget comprised of a matrix with columns for hourly rates, classification, and name for all personnel and/or sub-consultants involved for the work described in Section IV above. Cost proposals must provide a breakdown of hours and costs for each task listed in the scope of work. Sub-consultant costs, travel and all other direct costs will be reimbursed at cost with no markup allowed.

Proposers are requested to factor in 10% contingency in their cost proposals to cover unanticipated tasks outside the scope of services. This could include changes identified by the consultant and/or the Transportation Authority project team, which will be identified and discussed as soon as possible to determine potential impact to project schedule, effort, or budget. Changes are broadly defined as work activities or work products not originally planning for as defined in the scope of services.

SECTION VI - EVALUATION CRITERIA AND METHOD OF AWARD

The proposals will be evaluated by a selection committee appointed by the Executive Director and scored (maximum of 100 points) using the following criteria:

1. Proposer Information and Understanding of Project Objectives. (25 points)

- a. Responsiveness to all items requested in the RFP, such as completeness of submission, adherence to required page limits, overall organization and clarity of proposal; and
- b. Understanding of the services to be provided, particularly in relation to the Transportation Authority, and challenges for each task.

2. Technical and Management Approach. (30 points)

- a. Effectiveness of the proposed work plan, program and method of execution;
- b. Technical solutions to meet the scope of services; insight and understanding of special issues, problems and constraints, approach towards mitigating and resolving them;
- c. Effectiveness of the team's organizational structure in executing and managing the tasks;
- d. Management approach in providing technically sound and cost-effective services; and
- e. Ability to provide timely, qualified and adequate staffing and services to support project demands.

3. Capabilities and Experience. (30 points)

- a. Capability of project team, specific relevant experience, qualifications and expertise of each firm and subconsultant firm, especially the proposed key personnel; and
- b. Client references as to past project performance.

4. Cost. (10 points)

- a. Both the lowest overall cost and the average unit price (cost per person hour) may be considered in this category. Proposals in which the cost component does not reflect a reasonable relationship to the scope of services proposed may be rejected as non-responsive to project requirements.

5. DBE/LBE/SBE Goals. (5 points)

- a. All points will be awarded for teams meeting the DBE/LBE/SBE goal outlined in Section VII.

Evaluation Process. The selection committee retains the right to independently verify and evaluate relevant experience and client references, including any sources not mentioned in the proposal.

Submittals receiving an initial score of less than 70 points will not be considered further in the selection process. Proposers that have received a score of 70 points or higher may, at the Transportation Authority's sole discretion, be invited to an interview with the selection committee. The Transportation Authority reserves the right to not conduct oral interviews and determine the winning proposer based solely on the written proposal. If oral interviews are held, individuals who are identified as key personnel in the proposal are required to be in attendance at the interview. Based on the results of the interview, the selection committee may adjust initial scores on the evaluation criteria identified above to arrive at the final evaluation score. The proposer with the highest final evaluation score shall be determined as the top proposer. Proposers who do not arrive for a scheduled interview, if one is held, will no longer be considered further in the selection process.

Once the top proposer has been identified and the proposer's cost and pricing data has been reviewed, Transportation Authority staff will start contract negotiations with that proposer. If contract negotiations are not successful, the second-ranked proposer may be asked to negotiate with the Transportation Authority. Each proposer's cost and pricing data will remain sealed until negotiations begin with that particular proposer. The goal of such negotiations will be to agree on a final contract that delivers the services and work described in this RFP at a fair and reasonable cost to the Transportation Authority. The award, if any, will be made to the responsive proposer whose submittal is deemed most advantageous to the Transportation Authority.

The firm selected, if any, will be one whose proposal is most responsive to this RFP and deemed to be to the best advantage of the Transportation Authority. The Transportation Authority reserves the right to modify and/or suspend any and all aspects of this procurement, to obtain further information from any firm or person responding to this procurement, to waive any informality or irregularity as to form or content of this procurement or any response thereto, to be the sole judge of the merits of the proposals received, and to reject any or all proposals.

SECTION VII – DBE, LBE AND SBE REQUIREMENTS

DBE/LBE/SBE Policy. It is the policy of the Transportation Authority to make good faith efforts to solicit and obtain quotes, bids or proposals from DBEs, LBEs and SBEs, and to give small businesses the maximum feasible opportunity to participate in the performance of contracts funded in whole or in part with Transportation Authority resources. The Transportation Authority strongly encourages joint ventures among professional firms as a way to meet the Transportation Authority's DBE/LBE/SBE participation goals. Assistance in the formation of such joint ventures and/or associations may be obtained through the Human Rights Commission.

The Transportation Authority has established a DBE/LBE/SBE goal of 5% for this contract. Firms that propose as 5% DBE certified by the Transportation Authority or the California Unified Certification Program, 5% LBE certified by City, 5% SBE certified by the California Department of General Services, or a combination of DBEs, LBEs, and SBEs totaling 5% will satisfy the DBE/LBE/SBE goal. Disabled Veteran Business Enterprise (DVBE) firms, certified by the California Department of General Services, will be considered as SBEs and will be counted toward the contract goal. Lesbian, Gay, Bisexual and/or Transgender Business Enterprises (LGBTBE), certified by the California Public Utilities Commission Supplier Clearinghouse, will also be counted toward the contract goal. Firms do not need to be certified by all agencies to meet the DBE/LBE/SBE requirements. Businesses must be certified by the proposal due date.

Transportation Authority DBE Certification. Under Transportation Authority policy, a business qualifies for DBE certification if its annual gross receipts do not exceed \$2.5 million, when calculated as the average of the three (3) years immediately preceding the certification request. In order to obtain DBE certification, a business must submit a request to the Transportation Authority, including evidence of income for the past three years. Acceptable evidence of business income include: copies of tax returns, independently audited financial statements and, in the case of sole proprietorships, personal income tax returns. The Transportation Authority and its employees will not discriminate on the basis of race, color, creed, religion, national origin, ancestry, age, height, weight, sex, sexual orientation, gender identity, domestic partner status, marital status, or disability or AIDS/HIV status in the award and performance of Transportation Authority contracts.

Certifications. The Transportation Authority accepts certifications issued by the Transportation Authority, the City, the California Unified Certification Program, the California Department of General Services or the California Public Utilities Commission Supplier Clearinghouse. Applications for the Transportation Authority's DBE Program are available on the Transportation Authority's website (www.sfcta.org/dbe).

SECTION VIII – PROCUREMENT PROTEST AND APPEAL POLICIES AND PROCEDURES

The Transportation Authority has established protest procedures, which apply to all procurements of supplies, equipment, and services. Proposers must file protests with the Transportation Authority no later than five (5) business days after notice, actual or constructive, by the Transportation Authority's Executive Director or his/her designee, that either their bid (or proposal) is not being considered further, or a recommendation has been made to the Board to award to another bidder. Copies of these policies and procedures are kept at the Transportation Authority's offices and are available upon written request.

SECTION IX – NOTE REGARDING PUBLIC DISCLOSURE OF RESPONSES AND OTHER MATERIALS

Under the California Public Records Act (PRA; Government Code sections 6250 *et seq.*), records, information and materials submitted to the Transportation Authority, not otherwise exempt, are subject to public disclosure. Immediately after the contract has been awarded, the materials submitted by all proposers will be open to inspection. Each party submitting a response to the RFP should clearly designate financial submittals or other materials, if any, which it in good faith believes to be corporate proprietary information, including trade secrets, protected from disclosure; if no materials are designated, the submitted proposal in its entirety may be subject to the PRA. To the extent permitted by law, the Transportation Authority will attempt to maintain the confidentiality of such information by providing the proposer with notice that it has received a request. If the proposer desires that such materials not be disclosed, it may, at its own expense, take appropriate legal action to prevent such disclosure. However, such confidentiality cannot be assured, and the Transportation Authority will not be liable for the public disclosure of any material submitted to it.

EXHIBITS

The following documents are attached:

- Exhibit A – Terminated Contracts
- Exhibit B – Workforce Data Spreadsheets

Exhibit A – Terminated Contracts

Proposers must provide a list of contracts terminated (partially or completely) by clients for convenience or default within the past three (3) years. For each contract, the list must include the following information:

- Contract number;
- Contract value;
- Description of work;
- Sponsoring organization name; and
- Sponsoring organization key contact information, including name, title and current telephone number.

Proposer does not have any terminated contracts by clients for convenience or default within the past three (3) years.

Authorized Signature

Date Signed

Printed Name

Title

Firm Name

**Exhibit B – Workforce Data Spreadsheet #1
Breakdown of existing employees**

Name of firm: _____

Address: _____

| EMPLOYEE * CATEGORIES | TOTAL EMPLOYEE | | AFRICAN AMERICAN | | HISPANIC | | ASIAN/ PAC. ISL. | | AMER. IND./ ALAK. NTV. | | TOTAL MINORITY | | PERCENTAGE WHITE | | PERCENTAGE MINORITY | |
|--------------------------|-------------------|---|---------------------|---|----------|---|---------------------|---|------------------------------|---|-------------------|---|---------------------|---|------------------------|---|
| | M | F | M | F | M | F | M | F | M | F | M | F | M | F | M | F |
| Officials | | | | | | | | | | | | | | | | |
| Managers | | | | | | | | | | | | | | | | |
| Professionals | | | | | | | | | | | | | | | | |
| Technicians | | | | | | | | | | | | | | | | |
| Admin. Support | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Trainees | | | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Full-time | | | | | | | | | | | | | | | | |
| Part-time | | | | | | | | | | | | | | | | |
| TOTAL | | | | | | | | | | | | | | | | |

COMPLETED BY Name: _____ Title: _____ Date: _____

* If the list of occupations on the left side of the workforce data form does not match your occupation titles, please modify the data form to indicate occupations particular to your organization.

**Exhibit B – Workforce Data Spreadsheet #2
Breakdown of employees hired in last 12 months**

Name of firm: _____

Address: _____

| EMPLOYEE CATEGORIES | TOTAL EMPLOYEE | | AFRICAN AMERICAN | | HISPANIC | | ASIAN/ PAC. ISL. | | AMER. IND./ ALAK. NTV. | | TOTAL MINORITY | | PERCENTAGE WHITE | | PERCENTAGE MINORITY | |
|---------------------|----------------|---|------------------|---|----------|---|------------------|---|------------------------|---|----------------|---|------------------|---|---------------------|---|
| | M | F | M | F | M | F | M | F | M | F | M | F | M | F | M | F |
| Officials | | | | | | | | | | | | | | | | |
| Managers | | | | | | | | | | | | | | | | |
| Professionals | | | | | | | | | | | | | | | | |
| Technicians | | | | | | | | | | | | | | | | |
| Admin. Support | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Trainees | | | | | | | | | | | | | | | | |
| Others | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| Full-time | | | | | | | | | | | | | | | | |
| Part-time | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| TOTAL | | | | | | | | | | | | | | | | |

COMPLETED BY Name: _____ Title: _____ Date: _____

* If the list of occupations on the left side of the workforce data form does not match your occupation titles, please modify the data form to indicate occupations particular to your organization.