

EXHIBIT A
Consulting Services Agreement (State)

qualifications, in the opinion of Caltrans, to provide required services under this Agreement.

7. All inquiries during the term of this Agreement will be directed to the project representatives listed below:

Department of Transportation	Contractor:
Division of Transportation Planning Office of System Planning	Section/Unit: TBD
Contract Manager: TBD	Project Manager:
Address:	Address:
Phone:	Phone:
Fax:	Fax:
Email:	Email:

8. Introduction:

The work under this Agreement involves developing the first-ever California State Bicycle and Pedestrian Plan (CSBPP). In following its new mission statement to provide a safe, sustainable, integrated and efficient transportation system to enhance California’s economy and livability, Caltrans is actively planning for a multimodal transportation network that meets the needs of all users. Caltrans desires to develop a bike and pedestrian plan to establish a framework that will guide the planning and development of non-motorized transportation facilities and maximizes the use of future investments. The plan will provide for goals to better connect the State’s bicycle and pedestrian facilities with the existing network and other modes of transportation, and will help the State in attaining environmental goals such as reducing greenhouse gas emissions and vehicle miles traveled. The CSBPP will support and align with other efforts such as the California Transportation Plan (CTP).

The CSBPP will be a policy plan that guides Caltrans’ efforts to mainstream bicycle and pedestrian considerations in all district and headquarters functions. The policies of this plan will assist Caltrans in addressing a modal shift to bicyclists and pedestrians, and enhance multi-modal connectivity in terms of the State Highway System, State facilities, intercity and passenger rail, High Speed Rail, and public transit, all of which have a positive effect on achieving the State’s goals in reducing greenhouse gas emissions.

The plan will be prepared with the input of a diverse technical advisory committee (TAC) which will consist of Caltrans headquarters and district staff, and regional agency and advocacy group representation. The TAC will be guided by a Caltrans Policy Advisory Committee (PAC) and will incorporate public and stakeholder input as well as tribal government consultation.

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This scope of work involves tasks to be performed by the Contractor, Caltrans, and through an existing Caltrans Public Participation Engagement Contract (PPEC). Tasks identified in this scope of work are the responsibility of the Contractor unless explicitly stated otherwise. The primary tasks of this scope of work are to:

- Facilitate the discussions of the TAC to develop task components;
- Develop goals, objectives, priorities, strategies, and performance measures for the CSBPP;
- Assess Caltrans' procedural processes and identify needs that will enhance the process to provide for more robust opportunities incorporating bike and pedestrian elements into projects;
- Lead the effort, with TAC involvement, to identify a method to establish a measurement for ongoing bicycle and pedestrian monitoring; and
- Support for development of a State bike map as required by California Streets and Highways Code.

9. Purpose of Work

Work under this contract will result in the first California bicycle and pedestrian plan, which will be a visionary and comprehensive policy plan to support active modes of transportation and create a framework to increase safe bicycling and walking and implement a multi-modal transportation network. The CSBPP is not a statutorily required document; however, the development of statewide bicycle and pedestrian plans is becoming common practice for states to better promote the planning and development of walking and bicycling networks as key components of the transportation system. The plan will assist Caltrans' management of assets and provide a vision and direction for both district and headquarters functions. The CSBPP is envisioned to be a user-friendly document that will provide guidance to policy makers and Caltrans staff to enhance bicycle and pedestrian planning and project development. The CSBPP will also be a valuable reference and informational source for local partners and the general public.

10. Background

In 1994, California Streets and Highways Code (SHC) section 887.2 required the Department, in cooperation with local agencies, to “publish a statewide map illustrating state highway routes available for the use of bicyclist and, where bicyclists are prohibited from using a state highway, illustrating, in such a case, safe, alternate routes available to the bicyclist.”

In 2002 a report to the Legislature titled the *California Blueprint for Bicycling and Walking* was developed to address measurable goals for increasing bicycling and walking, funding of facilities, and a reduction in pedestrian and bicycling injuries and fatalities.

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In 2005 Caltrans produced the *Pedestrian and Bicycle Facilities in California – A Technical Reference and Technology Transfer Synthesis for Caltrans Planners and Engineers*. This document was intended to assist Caltrans in accommodating pedestrians and bicyclists on the State highway system serving as a resource on policies, laws, programs, the Caltrans planning and design process, guidelines, and best practices.

In 2014 Caltrans endorsed the National Association of City Transportation Officials (NACTO) *Urban Street Design Guide* along with the NACTO *Urban Bikeway Design Guide*. Both guides provide contemporary information that Caltrans can reference when implementing Caltrans' Complete Streets directive, DD-64-R1.

11. Description of Tasks

The Contractor shall perform the following tasks. These tasks are not necessarily exclusive of each other and may be conducted sequentially or concurrently, as determined by the Contractor in consultation with Caltrans. Some tasks, such as project management, will continue for the duration of the contract. Tasks may not necessarily be requested or performed in the order presented.

Task 1. Project Initiation and Management

- 1.1 Kickoff Meeting. Within two weeks of the Notice to Proceed, the Contractor project manager and key staff will participate in a meeting with Caltrans staff to introduce personnel involved in the project and to discuss the project goals, methodologies, deliverables, schedule, administration, and other project-related matters. Within one week following the meeting, Contractor will provide a written summary of the discussion, including major points and action items.
- 1.2 Project Memorandum. Contractor shall prepare a technical memorandum that provides management and administrative information pertaining to this contract. The memorandum will identify Contractor staff, subcontractor staff, organization of personnel, contact information, and key staff roles and responsibilities. The memorandum shall include quality assurance and quality control measures and procedures, timekeeping requirements, editorial guidelines and format requirements for written materials, and other matters as may be determined by the Contractor and the Caltrans Contract Manager.
- 1.3 Project Task Schedule. Contractor shall prepare a project task schedule. The task schedule will be developed following the kickoff meeting and incorporate key tasks and a development timeline. The schedule will incorporate public workshops dates that will be conducted by Caltrans through another contractor as agreed upon by Contractor and Caltrans.
- 1.4 Communication and Progress Reports. The progress reports shall include an overview of the major accomplishments and challenges, the budget status and progress made on each task and deliverable, as well as a projection of anticipated upcoming work. Contractor shall at all times maintain open lines of communication with the Caltrans Contract

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Manager and the Caltrans Office of Multi-Modal System Planning throughout the term of the contract. Contractor shall participate in periodic conference calls with the Caltrans project management staff no less frequently than every two weeks, and submit progress reports at least monthly, or as otherwise may be requested by the Caltrans Contract Manager. .

- 1.5 Draft and Final Products. All reports, technical memoranda, and other written and graphic products shall be provided in draft form to Caltrans for review, comment, and approval. Contractor shall prepare draft and final documents as specified herein; Caltrans may request a second draft of any submittal, including draft products. Comments and suggested changes from Caltrans shall be incorporated as appropriate; changes not incorporated shall be documented and explained in a transmittal memo with the final report. All reports shall be delivered in their original source software, a print-ready electronic file, and in the specified numbers of paper copies, if any.
- 1.6 Quality Control. Contractor shall develop and implement quality assurance and quality control (QA/QC) measures for all services and products, including internal review of draft products by a technical editor and a senior manager prior to submittal to Caltrans. QA/QC measures shall be included in the Project Memorandum.
- 1.7 Evaluation and Acceptance. Caltrans and Contractor shall set measurable acceptance criteria for all deliverables. Caltrans shall have sole discretion to determine whether a draft or final work product has been completed and is accepted. All deliverables shall be of a high quality as determined by the Caltrans Contract Manager. In addition, all deliverables shall have been prepared in compliance with the Contractor's PMP, including the QA/QC measures, and be neat, professional in appearance, well-organized, and technically and grammatically correct. Approval of work constitutes approval for payment and not transference or termination of Contractor's responsibility to perform work in accordance with the terms of the Agreement. Any work that needs corrections shall be at the Contractor's sole cost and expense in a timely manner, which may be expressly agreed upon in writing by the parties.
- 1.8 Source Files. Contractor shall deliver to Caltrans all source files for draft and final products, deliverables, and other work produced under this contract. Source files are copies of electronic files in their original, native software applications. These files will be delivered in useable electronic formats, as determined by the Caltrans Contract Manager. At the end of the contract term, Contractor shall provide three sets of a complete collection of all source files, as directed by the Contract Manager.

Work Products, Task 1

- a) Summary of kickoff meeting, including major points and action items
- b) Monthly progress reports
- c) Project Memorandum, with updates
- d) Project Task Schedule, with updates
- e) Source files for all deliverables in native software

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Task 2. Committees

- 2.1 Technical Advisory Committee. Contractor shall support and assist Caltrans to determine representation of a TAC which will provide recommendations and contribute to the technical aspects of the work under this Agreement. The TAC will be a diversified group of Caltrans headquarters and district staff, and have regional agency and advocacy group representation. The TAC membership is anticipated to consist of approximately 25 individuals. Up to 10 meetings of the TAC are anticipated with meetings spaced quarterly, or as appropriate. The Contractor can expect 5 TAC meetings to be at the Sacramento Headquarters location and 5 TAC meetings at various Caltrans District Office locations to be determined. Contractor shall prepare for, help to arrange, and facilitate meetings of the TAC. Prior to each meeting, Contractor shall prepare a draft agenda in consultation with the Caltrans Project Manager. Following each meeting, Contractor shall prepare a meeting summary, including conclusions or action items.
- 2.2 Policy Advisory Committee. The PAC is expected to be a high level Caltrans advisory body that will interact with the Caltrans Contract Manager and will provide guidance to significant CSBPP developments that are produced within the Scope of Work. Caltrans may choose an existing policy body, or may develop a new committee to act as the PAC. This task will be led by Caltrans who will be the primary point of contact with the PAC. The Contractor will attend PAC meetings for information purposes and to provide support for the Caltrans Contract Manager.

Work Products, Task 2

- a) Develop with Caltrans project manager TAC participants and contact list.
- b) Production of TAC draft and final agendas.
- c) Email meeting notifications and distribution of materials to advisory committees. (Hard copies of materials will be printed by Caltrans).
- d) TAC meeting facilitation, TAC and PAC presentations, and TAC written meeting summaries.

Task 3. Inventory of Existing Documents, Statutes, Policies, and Procedures

- 3.1 The Contractor will work with the Caltrans Contract Manager and appropriate staff to assemble and assess the information required for this task. This task will provide brief summaries of existing information and provide complete citations for source material. In 2005 Caltrans completed a guide *Pedestrian and Bicycle Facilities in California* that contains a comprehensive listing of laws, policies, and guidance. The Contractor will assess the need to provide updates for new or existing information and incorporate this information into the CSBPP. Inclusion and review of relevant information includes, but is not limited to:
- Caltrans updated Mission, Vision, and Goals;
 - New or applicable Federal and State laws, including Americans with Disability Act (ADA) provisions;

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- Analysis of Caltrans policies, plans, directives, and procedures that apply to planning, programming, project development, construction, maintenance, and operations;
- Relevant State plans including the CTP, Non-motorized Transportation Facilities Report, State Strategic Highway Safety Plan, and Complete Streets Implementation Action Plan 2.0.
- Design guidance including the Highway Design Manual and other available options including Caltrans endorsement of (NACTO) guides.

Work Product, Task 3

- a) Working Paper: Existing Documentation Inventory.

Task 4. Develop Goals, Objectives, Strategies, and Performance Measures

- 4.1 Contractor will facilitate and develop, with input from the TAC, visionary and aspirational goals, objectives, and strategies to increase bicycling and walking in California. Caltrans' Mission, Vision, and Goals, as well as policies of the CTP will form overarching policies of the CSBPP. This process will in part require the development of needs, priorities and trends that will be identified by the TAC and Contractor, and as a resource the Federal Highway Administrations *Statewide Pedestrian and Bicycle Planning Handbook*, 2014. Goals and objectives for consideration include but are not limited to: supporting active transportation modes; enhancing connectivity with intercity rail, passenger rail, and High Speed Rail; enhancing connectivity with the State highway and State facilities; promoting health; reducing greenhouse gas emissions; enhancing safety; improving connectivity with local networks; maximizing and managing transportation investments; and guiding future planning, project delivery, construction and maintenance.
- 4.2 Contractor will develop and recommend, with input from the TAC, performance measures for assessing progress toward goals, objectives, and strategies. Performance measures will consider, but not be limited to the use of a comfort level index, customer satisfaction, time, distance, or ridership.
- 4.3 As a higher level tracking mechanism, Contractor will recommend a means to measure overall progress towards meeting the State's goals at the District level.

Work Product, Task 4

- a) Working Paper: CSBPP Goals, Objectives, Strategies, and Performance Measures

Task 5. Develop Baseline Data Methodology Recommendation, and Performance Measures Data Needs

- 5.1 The Contractor will lead discussions with the TAC to assess viable options for determining a baseline count measurement for bicyclists and pedestrians. This methodology will take into consideration the 2009 *California National Household*

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Travel Survey or other readily available sources of information. The recommended methodology for baseline measurement and assessment will consider reliability of source information for continued monitoring. The preferred option agreed upon by the TAC and approved by Caltrans will be discussed and defined in the CSBPP. Caltrans may develop baseline measurements for incorporation into the CSBPP by Contractor.

- 5.2 Based on identified performance measures, the Contractor will provide recommendations to the TAC to discuss data collection needs that will be required to support performance measures. With TAC approval of plausible data collection needs, the Contractor will incorporate into the CSBPP the type of data collection needs required to support the identified performance measures.

Work Product, Task 5

- a) Working Paper: Recommended Baseline Measurement Methodology
- b) Working Paper: Performance Measures Monitoring Data Needs

Task 6. Caltrans Implementation Needs Assessment

- 6.1 Through input provided by the TAC, assess Caltrans procedures and workforce involved in the planning through project development process, including maintenance and operations, to more robustly enhance the inclusion of bike and pedestrian elements into projects. This assessment should consider the needs for functional coordination at both districts and headquarters levels to facilitate mainstreaming bicycle and pedestrian considerations in all functions.
- 6.2 Assess the need for evaluating bicycle and pedestrian components of projects early on in the District planning process including transportation concept reports (TCRs), project initiation documents (PIDs), and other District planning efforts.
- 6.3 Assess input from external stakeholders and members of the general public regarding the current state of the system. The assessment of needs from this task will be developed by the Contractor with input provided from the TAC and public workshop results provided by Caltrans' PPEC Consultant. (See Task 9).

Work Product, Task 6

- a) Working Paper: Procedural Needs Assessment and Recommendations
- b) Working Paper: Assessment of Stakeholder and Public Outreach

Task 7. Statewide Bike Map and Network Gap Analysis

- 7.1 The Contractor will assess map attributes that will define the components of the statewide bicycle map. This will include coordinating with the Caltrans Contract Manager to assemble a mapping working group of appropriate headquarters and district staff to determine mapping constraints and opportunities to meet the requirements of CSH Section 887.2. The Contractor will facilitate up to four (4) meetings with the working

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group to determine attributes that will be mapped. The Contractor will document mapping descriptions and defined attributes in a Technical Memorandum.

- 7.2 Contractor will assess through the process initiated in Task 7.1, possible recommendations with connecting ongoing map development with subsequent District planning activities.
- 7.3 The Caltrans mapping working group will develop the statewide bicycle map(s) as determined by the attributes defined in task 7.1. If possible, the map(s) will be developed in parallel with the CSBPP to ensure timely incorporation into the Draft plan.
- 7.4 Contractor will incorporate Statewide Bike Map(s) provided by Caltrans within the CSBPP. Contractor will prepare appropriate literature to accompany or describe the map(s) or mapping topics within the CSBPP, and document any future mapping needs.
- 7.5 Contractor will develop recommendations on how data collection to produce the State bike map can correlate with information used for Caltrans Asset Management Plan.

Work Products, Task 7

- a) Contractor to produce Bike Mapping Technical Memorandum.
- b) Contractor to produce a formatted Mapping Data Template (MS Word or Excel) for District mapping data collection efforts.
- c) Caltrans to produce Statewide Bike Map.
- d) Contractor to incorporate relevant maps into the CSBPP.

Task 8. Other Topics

- 8.1 Contractor will document relevant safety related statistics on state managed facilities over an acceptable amount of time, e.g. ten years.
- 8.2 Contractor will develop a two-page public informational component in the CSBPP that identifies safety awareness tips for bicyclists, pedestrians, and drivers. This two-page component will be produced in a style and format that can also be reproduced as a front and back informational tri-fold handout. An electronic version of this CSBPP component will be provided as a separate file for continued reproduction by Caltrans.
- 8.3 Contractor will develop recommendations for how the CSBBP will compliment other regional and local plans.
- 8.4 Contractor will develop an informational component discussing the benefits of non-motorized transportation for individuals and the State as a whole. Topics should include, but are not limited to: individual health benefits; household cost savings; traffic congestion; reduced parking requirements; reduction in greenhouse gas emissions and oil dependence.
- 8.5 Contractor will develop an informational component that will discuss Caltrans role in developing a sustainable transportation system and how Caltrans can support regional land use and design decisions that enhance bicycling and walking. Suggested topics

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include, but are not limited to State planning grant opportunities, regional planning functions (e.g., overall work program, regional transportation plan guidance), and factors such as distances to desired locations (e.g., jobs, housing, shopping, schools, and public transit).

- 8.6 Contractor, with input from the TAC, will identify methods of evaluation for investments in active modes of transportation that may also include investment strategies to help meet the goal of the plan.

Work Products, Task 8

- a) Working Paper: Safety.
- b) Safety awareness informational section and tri-fold handout. Electronic file of the handout will be provided to Caltrans.
- c) Working Paper: Regional Coordination.
- d) Working Paper: Benefits of Non-motorized Transportation.
- e) Working Paper: Partnering for Sustainable Transportation.
- f) Working Paper: Evaluation Methods.

Task 9. Public Outreach and Engagement

- 9.1 Public outreach and engagement for the CSBPP will be conducted by Caltrans and other contractors under an existing Caltrans Planning Public Engagement Contract (PPEC). The public engagement process is expected to include public workshops, tribal government consultation, and interagency outreach. Public outreach and engagement including meeting planning, workshops, media coordination, and press releases will not be the responsibility of the Contractor under this Agreement. Contractor will assess with the Caltrans Contract Manager the most opportune time to engage the public within the planning process.
- 9.2 As directed by the Caltrans Contract Manager, Contractor shall coordinate with the PPEC contractor to provide information needed for public outreach and engagement and to identify stakeholders and interested parties for public engagement activities.
- 9.3 Contractor will evaluate public and agency comments developed during the public outreach process and incorporate public outreach results into the CSBPP.

Work Products, Task 9

- a) Internal memos and communication as needed.
- b) Working Paper: Public Engagement Activities and Assessment.

Task 10. Recommendations and Strategies for Implementation

- 10.1 Contractor shall develop a section to the CSBPP that will provide recommendations and strategies for implementing the CSBPP. This will include:

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- Assessment of scope of work tasks with emphasis on critical products including goals, objectives, strategies, and needs that are needed to implement the CSBPP.
- Recommendation of roles, responsibilities, and resource needs for the districts and headquarters.
- Recommendation of plan updates or additional plan needs.

Work Product, Task 10

- a) Working Paper: CSBPP Implementation and Recommendations

Task 11. CSBPP Annotated Outline and Draft CSBPP

11.1 Contractor shall incorporate and format the content of all tasks to produce a document that will be the California State Bicycle and Pedestrian Plan. Contractor shall first prepare an annotated outline of the plan format for review and comment by Caltrans, the TAC, and the PAC. Following incorporation of comments, Contractor shall prepare and submit a preliminary Draft CSBPP for review and comment by Caltrans, the TAC, and the PAC. Following incorporation of comments, Contractor shall prepare a public draft CSBPP. The CSBPP will be a high-quality document that will contain information of substance, be user-friendly and easily understood. The CSBPP will incorporate relevant graphics, maps, and images that will enhance or illustrate concepts or topics.

Work Product, Task 11

- a) Annotated CSBPP Outline
b) Preliminary Draft CSBPP
c) Public Draft CSBPP

Task 12. Final Product

12.1 As directed by the Caltrans Contract Manager, Contractor shall incorporate public comments and produce a draft Final CSBPP.

12.2 Following review and comments by Caltrans, the TAC, and the PAC, Contractor shall produce a final CSBPP. Contractor shall provide the final plan in print-ready electronic format. The format of the final plan will be developed and provided in a way that can easily be printed for hard copy distribution, and also formatted for ease of use via Caltrans website. Mass printing of the Final CSBPP shall use Caltrans in-house printing and reprographic services, as well as bulk mailing services.

Work Product, Task 12

- a) Draft Final CSBPP
b) Final CSBPP