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Deputy Executive Director, Operations

October 24, 2011

REQUEST FOR PROPOSALS (RFP)

Travel Model Supply Development

Letter of Invitation

Dear Consultant:

The Metropolitan Transportation Commission (MTC) invites your firm to submit a proposal to assist MTC in improving our analytical planning tools. Specifically, MTC seeks assistance re-building the representation of space, roadway networks, transit networks, pedestrian networks, and bicycle networks within our regional travel model.

This letter and its enclosures comprise the Request for Proposal (RFP) for the Travel Model Supply Development Project. You may download a copy of the RFP from MTC's website at <http://www.mtc.ca.gov/jobs/>. Responses should be submitted in accordance with the instructions set forth in this RFP.

Proposal Due Date

Interested firms must submit an original and four (4) copies, as well as an electronic version in Adobe PDF format, of their proposal by **4:00 pm, Monday, December 12, 2011**. **Proposals received after that date and time will not be considered.** Proposals shall be considered firm offers to provide the services described for a period of ninety (90) days from the time of submittal.

MTC Point of Contact

David Ory will be MTC's Project Manager and point of contact for this contract. Proposals and all inquiries relating to this RFP shall be submitted to Mr. David Ory, Project Manager, at the address shown below. For telephone inquiries, call (510) 817-5755. E-mail inquiries may be directed to DOry@mtc.ca.gov.

David Ory, Project Manager
Metropolitan Transportation Commission
Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700

Consultant Qualifications

Proposals must demonstrate that the Consultant(s) meet the following minimum qualifications to be eligible for consideration for this project:

- Project manager who has played a similar role on a minimum of one (1) project substantially similar to the services requested by MTC, in the last five (5) years prior to the date of this RFP; and,
- Each project team member other than support staff has a minimum of one (1) year work or academic experience on similar projects, with specific experience based on the tasks on which he or she is proposed to work.

In addition to the minimum qualifications listed above, proposers are expected to demonstrate expertise with the technical procedures and software used in MTC's analytical tools, including the following:

- Activity-based, micro-simulation travel models;
- Java programming language;
- Geographic information systems (GIS); and,
- Citilabs's Cube.

Background

MTC recently transitioned to an activity-based travel model and in doing so, dramatically improved the sophistication in which our analytical tools represent travel demand. We now want to similarly overhaul the travel model's representation of transportation supply. Specifically, we seek assistance re-building our representation of space (i.e. our travel analysis zones), roadway network, transit network, pedestrian network, and bicycle network.

Scope of Work, Budget and Schedule

A preliminary scope of work for the project is provided in *Appendix A, Preliminary Scope of Work*. MTC will work with the selected Consultant to develop a detailed work plan.

The contract payment terms will be lump sum (firm fixed price) with payment made on the basis of receipt by MTC of satisfactory deliverables. A budget of two hundred seventy-five thousand dollars (\$275,000) is currently available in Fiscal Year (FY) 2011-12 for this effort. Additional funding may be available in FY 2012-13 subject to approval of the FY 12-13 budget.

MTC expects work to commence on or about April 2012, and to be completed no later than December 2013.

Proposers' Conference and Requests for Clarification or Exceptions

A proposers' conference will be held at 11:00 am, Monday, November 7, 2011 at the Joseph P. Bort MetroCenter Building, 101 Eighth Street, Oakland, in the MTC Fishbowl Conference Room.

Any addenda will be posted on MTC's website. All potential bidders are responsible for checking the website for any addenda to the bid documents.

Any requests for clarification of or exceptions to RFP requirements must be received by MTC no later than 4:00 pm, Wednesday, November 16, 2011, to guarantee response or consideration.

Proposal Evaluation

Proposals will be evaluated in accordance with the evaluation factors listed in *Section V* of this RFP. MTC reserves the right to accept or reject any or all proposals submitted, waive minor irregularities in proposals, request additional information or revisions to offers, and to negotiate with any or all proposers. Any contract award will be to the firm that presents the proposal that, in the opinion of MTC, is the most advantageous to MTC, based on the evaluation criteria in *Section V*.

Consultant Selection Timetable

Date	Event & Location
11:00 am, Monday, November 7, 2011	Proposers' Conference at 101 Eighth Street, Oakland, CA 94607 Fishbowl Conference Room (Third Floor)
4:00 pm, Wednesday, November 16, 2011	Closing date/time for receipt of requests for clarification/exceptions
No later than three (3) working days prior to the date proposals are due.	Deadline for protesting RFP provisions
4:00 pm, Monday, December 12, 2011	Closing date/time for receipt of proposals
Monday, January 9, 2012	Interviews/Discussions (if held)
Monday, January 16, 2012	Date for receipt of Best and Final Offers (if required)
Wednesday, February 15, 2012	MTC Administration Committee Approval
Monday, March 12, 2012 (approximate)	Execution of Consultant Contract

General Conditions

MTC will not reimburse any Consultant for costs related to preparing and submitting a proposal.

All materials submitted by proposers are subject to public inspection under the California Public Records Act (Government Code § 6250 *et seq.*), unless exempt. (See *Section VI.E* of RFP).

A synopsis of MTC's contract provisions is enclosed for your reference as *Appendix D, Synopsis of Provisions in MTC's Standard Consultant Agreement*. If a proposer wishes to propose a change to any standard MTC contract provision, the provision and the proposed alternative language must be submitted prior to the closing date for receipt of requests for clarifications/exceptions listed above. If no such change is requested, the Consultant will be deemed to accept MTC's standard contract provisions, unless such language is protested in accordance with the procedures in *Section VI.E* of the RFP.

The selected Consultant will be required to maintain insurance coverage, during the term of the contract, at the levels described in *Appendix E, Insurance Requirements*. Consultant agrees to provide the required certificates of insurance providing verification of the minimum insurance requirements listed in *Appendix E, Insurance Requirements*, within five (5) days of MTC's notice to firm that it is the successful proposer. Requests to change MTC's insurance requirements should be submitted on or prior to the closing date for receipt of requests for clarifications/exceptions listed above. MTC will review the requests and issue an addendum if material changes requested by a prospective proposer are acceptable. Objections to MTC determinations on requests to change insurance requirements must be brought to MTC's attention no later than the date for protesting RFP provisions above. If such objections are not brought to MTC's attention consistent with the protest provisions of this RFP, compliance with all material insurance requirements will be assumed.

Authority to Commit MTC

Based on an evaluation conducted by an evaluation panel, the Executive Director will recommend a Consultant to the MTC Administration Committee, which will commit MTC to the expenditure of funds in connection with this RFP.

Thank you for your interest.

Sincerely,



Steve Heminger
Executive Director

SH:DO

REQUEST FOR PROPOSALS

to the

METROPOLITAN TRANSPORTATION COMMISSION

for

TRAVEL MODEL SUPPLY DEVELOPMENT

October 24, 2011

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700

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I. BACKGROUND AND PROJECT DESCRIPTION

A. *Background*

MTC recently transitioned to an activity-based travel model and, in doing so, dramatically improved the sophistication in which our analytical tools represent travel demand. We now want to similarly overhaul the travel model's representation of transportation supply. Specifically, we seek assistance re-building our representation of space (i.e. our travel analysis zones), roadway network, transit network, pedestrian network, and bicycle network. As these representations are improved, MTC also seeks assistance in modifying our travel model scripts and routines to accommodate the new representations of supply. As such, an understanding of activity-based travel models generally and MTC's model specifically are essential to successfully performing this work. MTC is not seeking assistance in re-calibrating or re-validating the travel model as part of this effort.

The MTC travel model currently includes 1454 travel analysis zones (TAZs), which, for the most part, are equivalent to 2000 Decennial Census tracts. A new zone system is desired and should be constructed in acknowledgement of (a) 2010 Decennial Census geography; (b) the zone systems used by the Bay Area's Congestion Management Agencies; (c) the parcel database recently assembled by the Association of Bay Area Governments (ABAG) to support land use modeling efforts; (d) computational/memory/storage demands; and, (e) the differing geographies at which automobile and transit/non-motorized travelers interact with transportation infrastructure.

The MTC travel model currently uses a roadway network based on the 1990 Census TIGER line file. The network contains approximately 35,000 links, including representations of high-occupancy vehicle (HOV) lanes. A new representation of the Bay Area roadway network is desired and should be constructed such that (a) it is consistent with either OpenStreetMap or the proprietary TeleAtlas/TomTom network used by MTC GIS staff (access to this network can be granted via MTC for this work); (b) mechanisms can be put in place such that consistency can be maintained between the network and one of the two networks noted in (a); (c) it identifies links at which traffic data is being monitored, including but not limited to the California Department of Transportation's Performance Measurement System (PeMS) and MTC's 511 system; (d) it represents each paved, public roadway in the nine-county Bay Area; (e) it contains data, to the extent such data is readily available, needed to compute estimates of roadway capacity and free flow speed, including, for example, shoulder width and grade; and, (f) it contains all the data and special-link-representations (i.e. HOV lanes) needed to execute the current MTC travel model.

The MTC travel model currently uses a transit network coded per the procedures of the Cube TRNBUILD routine. The networks are kept in ASCII text files, with separate files for storing lines, fares, and support links. A new representation of the Bay Area transit network is desired and should be constructed such that (a) mechanisms can be put in place such that consistency can be maintained between the network and either MTC's Regional Transit Database, which is a compilation of the information submitted by transit agencies to MTC to support the 511 transit trip planner, or Google's transit trip planner; (b) it can be readily stored in a series of geo-spatial relational databases; (c) it can be updated by modifying records in Cube software format (i.e. the user can edit records in this format) and can be readily exported to a format accepted by the

Cube software; (d) it can be updated by modifying records in Google transit feed format (i.e. the user can edit records in this format) and can be readily exported to Google transit feed format; (e) line files can be readily and accurately displayed on maps, with the transit network overlaying the roadway network; and, (f) it contains all the data and special-link-representations needed to execute the current MTC travel model.

The MTC travel model currently assumes bicycles and pedestrians travel over the roadway network, excluding freeways and bridges without pedestrian facilities, at a constant speed. A new representation of the Bay Area pedestrian and bicycle networks are desired and should be constructed such that (a) the presence and quality of sidewalks, to the extent data is readily available, are included; (b) mechanisms can be put in place such that consistency can be maintained between the bicycle network and MTC's BikeMapper; and, (c) to the extent data is readily available, variables useful for representing the impedance of walking and bicycling between locations are included.

Examples of the current network files used by MTC are available upon request from MTC's Project Manager.

B. Project Objectives and Description

The broad objective of this work is to improve the analytical tools MTC uses to inform decision makers as to the likely outcomes of various transportation policies and projects considered in our regional planning activities. The representation of transport supply is critical to accurately predicting how travelers both today and in the future interact with transport infrastructure. Advances in computing power over the past decade has greatly increased our ability to represent land uses, roadway facilities, transit service, bicycle paths, and sidewalks at a very detailed level. MTC wants to leverage these advances, along with information developed to support popular interest in transportation networks utilized in navigation devices and traveler information systems, to improve our analytical tools.

II. PROPOSER MINIMUM QUALIFICATIONS AND REQUIREMENTS

Proposals must demonstrate that the proposer meets the following minimum qualifications to be eligible for consideration for this project.

- Project manager who has played a similar role on a minimum of one (1) project substantially similar to the services requested by MTC, in the last five (5) years prior to the date of this RFP; and,
- Each project team member other than support staff has a minimum of one (1) year work or academic experience on similar projects, with specific experience based on the tasks on which he or she is proposed to work.

In addition to the minimum qualifications listed above, proposers are expected to demonstrate expertise with the technical procedures and software used in MTC's analytical tools, including the following:

- Activity-based, micro-simulation travel models;
- Java programming language;
- Geographic information systems (GIS); and,
- Citilabs's Cube.

III. SCOPE OF WORK, PERIOD OF PERFORMANCE, AND BUDGET

A. Scope of Work

A preliminary scope of work for the project is provided in *Appendix A, Preliminary Scope of Work*. The selected Consultant will be expected to perform all work and analysis necessary to complete the scope of work.

B. Period of Performance

MTC expects the work to commence on or about April 2012 and to be completed by December 2013.

C. Budget

MTC has budgeted two hundred seventy-five thousand dollars (\$275,000) for this effort. Additional funding may be available in FY 2012-13 subject to approval of the FY 12-13 MTC budget.

D. Personnel

Any change in key staff persons identified in the contract is subject to the approval of MTC. Removal by the Consultant of any key staff persons identified in the contract without written consent of the MTC Project Manager may be considered a material breach of contract.

IV. PROPOSAL FORM

Proposers must submit an original and four (4) hard copies and an electronic copy in Adobe PDF format of their proposal to MTC, at the address listed on the letter of invitation, by **4:00 pm, Monday, December 12, 2011** to be considered. Proposal content and completeness are most important. Clarity is essential and will be considered in assessing the proposer's capabilities.

Each proposal should include:

A. Transmittal Letter

Proposals must include a transmittal letter signed by an official authorized to solicit business and enter into contracts for the firm and the name and telephone number of a contact person, if different from the signatory.

B. Title Page

Proposals must include a title page that includes the RFP subject, the name of the proposer's firm, address, telephone number, name of contact person, and the date.

C. Table of Contents

Proposals must include a table of contents that includes a clear identification of the material by section and page number.

D. Overview and Summary

This section should convey the Consultant's understanding of the work requested by MTC; it should include, at a minimum, an overview of the proposed approach for working with MTC to accomplish the tasks at hand.

E. Preliminary Work Plan

This section should present a preliminary work plan for Tasks 1 through 10 described in *Appendix A, Preliminary Scope of Work*. The proposed work plan should:

1. Discuss how the identified tasks will be conducted and propose a preliminary schedule. The proposal should discuss the tasks in sufficient detail to demonstrate a clear understanding of the project and component tasks. The proposal may include additional tasks or sub-tasks the Consultant believes necessary to accomplish the project goals. The schedule should show the expected sequence of tasks, subtasks and milestones.
2. Provide a preliminary staffing plan for each preliminary task. Provide an organizational chart that shows roles and responsibilities of key personnel and reporting structure, including reporting and communication relationships between MTC, Consultant staff, and subcontractors, if any.
3. Provide a preliminary computing resources plan for the entire project. Please assume that MTC will not provide the Consultant access to MTC's computers for this work. If the Consultant plans to purchase computers as part of this effort, please include the cost of purchasing computers in the proposed budget.
4. Describe approach to managing resources and maintaining quality results. Include a description of the role of any subcontractors, their specific responsibilities, and how their work will be supervised to maintain quality results.
5. Identify and explain any problem areas and/or potential obstacles (such as schedule creep, budget overruns, personnel management, feasibility, etc.) to successful completion of the anticipated scope of work. Discuss methods, formal and informal, that you will use to track and resolve these problems/obstacles during the project.

F. Qualifications and References

1. Describe proposed team's qualifications specific to the requirements set forth in *Section II, Proposer Minimum Qualifications and Requirements*. Identify the personnel, including subcontractors' personnel, whose expertise or experience addresses each of the specified needs. Proposers are welcome to identify and provide examples of any other qualifications they feel are critical to the successful completion of the scope of work attached as *Appendix A, Preliminary Scope of Work*.
2. Identify key personnel (including subcontractor personnel) and briefly discuss individual qualifications to perform each task. Each key personnel resume should not exceed two pages.
3. Provide a succinct description (one page maximum) of any previous projects similar to the services requested, indicating the project title, duration, budget, sponsoring agency and sponsor project manager, and roles played by individuals proposed for this study. Include the name of the agency for whom the work was performed, year performed, name of the contact person and their telephone number.
4. Provide at least one sample of a written technical report or memo prepared by key members of the Consultant team, identifying the authors. Only one copy is required, and the sample will be returned after proposal evaluation, upon request.
5. Provide a list of references (including references for subcontractors) and their contact information.
6. Provide a summary of all contracts your firm (including subcontractors) has held with MTC in the past three years, including a brief description of the scope of work, the contract amount, and date of execution.

G. Cost Proposal

Based on the preliminary tasks and staffing plan described in response to *IV.E.1* and *IV.E.2*, provide a breakdown of the expected expenditures of funds for each task described in *Appendix A, Preliminary Scope of Work*. The budget should include, but is not limited to, a task budget and a line item budget with billing rates.

It is important for MTC to be able to determine all project costs, including any computers or software the Consultant would expect MTC to pay for to be able to perform the work. Consultants should include in both the task and line item budget a description of all expenses that would be passed along to MTC.

1. The task budget should present a breakdown of hours and expenses by task and deliverable for the project. It should identify or refer to key personnel or job descriptions in relation to each task to provide a full explanation of the resources committed to the project.
2. The line item budget should present a breakdown of costs by cost categories, including billing rates for key personnel and job classifications, and costs for computing resources (if

needed). The line item budget should be set forth on the Cost and Price Analysis Form attached hereto as *Appendix B* to this RFP. A line item budget should also be submitted for proposed sub-Consultants with contracts estimated to exceed \$25,000. *Appendix B* is available in electronic spreadsheet format upon request.

H. California Levine Act Statement

Submit a signed Levine Act statement (*Appendix C*).

I. Insurance Provisions Document

Submit a signed Insurance Provisions Document (*Appendix E*).

V. PROPOSAL EVALUATION

A. Verification of Minimum Qualifications

The Project Manager, in consultation with the MTC Office of General Counsel, will review proposals to ensure that each proposal meets the minimum qualifications set out in *Section II, Proposer Minimum Qualifications and Requirements* of this RFP. Proposers failing to meet the minimum qualifications will not be considered.

B. Review for General Responsiveness

The Project Manager, in consultation with the MTC Office of General Counsel, will then conduct an initial review of the proposals for general responsiveness. Any proposal that does not include enough information to permit the evaluators to rate the proposal in any one of the evaluation factors listed below will be considered non-responsive. A proposal that fails to include one or more items requested in *Section IV, Form of Proposal*, may be considered complete and generally responsive, if evaluation in every criterion is possible.

C. Evaluation Criteria

Responsive proposals will then be evaluated by a panel of MTC and/or other public agency staff on the basis of the following evaluation factors, in order of relative importance:

1. Individual and team expertise and experience providing similar consulting services.
2. Approach to completing the project, including but not limited to: understanding of the need, requirements, and timeline; proposed approach to project tasks; ability to anticipate and respond to potential challenges; strategy for managing resources; and approach to quality control and quality assurances.
3. Cost effectiveness, including hourly rates; basis for escalation over term of contract; reasonableness and appropriateness of preliminary task budget.
4. Written and oral communication skills, based on proposal and interview, if held.

D. Proposer Discussions

Following the initial evaluation, the panel may elect to recommend award to a particular proposer (with or without interviews) or multiple proposers, or to enter into discussions with a “short list” of proposers, consisting of those proposers reasonably likely, in the opinion of the panel, to be awarded a contract.

The purpose of discussions with a proposer on the “short list”, if held, will be to identify specific deficiencies and weaknesses in its proposal and to provide the proposer with the opportunity to consider possible approaches to alleviating or eliminating them. These deficiencies or weaknesses may include such things as technical issues, management approach, cost, or team composition. Discussions may take place through written correspondence and/or during face-to-face interviews. The proposer’s Project Manager, as well as other key personnel identified by the evaluation panel, will be expected to participate in any discussions. A proposer on the “short list” invited to participate in discussions will be expected to provide a presentation limited to 20 minutes consisting of an overview of its approach to the project.

E. Request for Best and Final Offer

Following discussions, if held, proposers on the “short list” will be given the opportunity to revise their written proposals to address the concerns raised during discussions through issuance of Request for Best and Final Offer (BAFO). Following receipt of the BAFOs, the evaluation panel will evaluate the BAFOs against the evaluation criteria.

MTC reserves the right not to convene oral interviews or discussions, and to make an award on the basis of initial proposals. MTC reserves the right to award multiple contracts to different firms for different aspects of the work. References may be contacted at any point in the evaluation process.

The panel will recommend a Consultant to the MTC Executive Director based on their evaluation of the written proposals or BAFOs and oral interviews or discussions (if held). The Executive Director will review the recommendation and, if he agrees, forward the recommendation to the Administration Committee for approval.

MTC reserves the right to accept or reject all proposals submitted, waive minor irregularities, request additional information, or revisions to offers, and negotiate with any or all proposers.

VI. GENERAL CONDITIONS

A. Limitations

This RFP does not commit MTC to award a contract or to pay any costs incurred in the preparation of a proposal in response to this RFP.

B. Award

All finalists may be required to participate in negotiations and to submit such price, technical, or other revisions of their proposals as may result from negotiations. MTC also reserves the right to award contracts without discussion, based upon the initial proposals. Accordingly, each initial proposal should be submitted on the most favorable terms from a price and technical viewpoint. Any awards made will be to the Consultant(s) whose proposals are most advantageous to MTC based on the evaluation criteria outlined above.

C. Binding Offer

A signed proposal submitted to MTC in response to this RFP shall constitute a binding offer from a Consultant to contract with MTC according to the terms of the proposal for a period of ninety (90) days after its date of submission, which shall be the date proposals are due to MTC.

D. Contract Arrangements

A synopsis of MTC's contract provisions is enclosed for your reference as *Appendix D, Synopsis of Provisions in MTC's Standard Consultant Agreement*. If a proposer wishes to propose a change to any standard MTC contract provision, the provision and the proposed alternative language must be submitted prior to the closing date for receipt of requests for clarifications/exceptions listed above. If no such change is requested, the Consultant will be deemed to accept MTC's standard contract provisions, unless such language is protested in accordance with *Section VI.E* below.

The selected Consultant will be required to maintain insurance coverage, during the term of the contract, at the levels described in *Appendix E, Insurance Requirements*. Consultant agrees to provide the required certificates of insurance providing verification of the minimum insurance requirements in *Appendix E*, within five (5) days of MTC's notice that it is the successful proposer. Requests to change MTC's insurance requirements should be submitted on or prior to the closing date for receipt of requests for clarifications/exceptions listed above. MTC will review the requests and issue an addendum if material changes requested by a prospective proposer are acceptable. Objections to MTC determinations on requests to change insurance requirements must be brought to MTC's attention no later than the date for protesting RFP provisions listed above. If such objections are not brought to MTC's attention consistent with the protest provisions of this RFP, compliance with all material insurance requirements will be assumed.

The contract resulting from this RFP will be a firm fixed price, with payment based on MTC's receiving of satisfactory deliverables.

E. Selection Disputes

A proposer may object to a provision of the RFP on the grounds that it is arbitrary, biased, or unduly restrictive, or to the selection of a particular Consultant on the grounds that MTC procedures, the provisions of the RFP or applicable provisions of federal, state or local law have been violated or inaccurately or inappropriately applied by submitting to the Project Manager a written explanation of the basis for the protest:

- 1) No later than three (3) working days prior to the date proposals are due, for objections to RFP provisions;
- 2) No later than three (3) working days after the date the firm/team is notified that it did not meet the minimum qualifications, did not satisfy DBE requirements, or was found to be non-responsive; or
- 3) No later than three (3) working days after the date on which contract award is authorized by the Administration Committee or the date notified that it was not selected, whichever is later, for objections to Consultant selection.

Except with regard to initial determinations of non-responsiveness or failure to meet the minimum requirements, the evaluation record shall remain confidential until the MTC Administration Committee authorizes award.

Protests of recommended awards must clearly and specifically describe the basis for the protest in sufficient detail for the MTC review officer to recommend a resolution to the Executive Director.

The Executive Director will respond to the protest in writing, based on the recommendation of a staff review officer. Authorization to award a contract to a particular Contractor by MTC's Administration Committee shall be deemed conditional until the expiration of the protest period or, if a protest is filed, the issuance of a written response to the protest by the Executive Director.

Should the Proposer wish to appeal the decision of the Executive Director, it may file a written appeal with the MTC Administration Committee, no later than three (3) working days after receipt of the written response from the Executive Director. The Administration Committee's decision will be the final agency decision.

F. Public Records

This RFP and any material submitted by a proposer in response to this RFP are subject to public inspection under the California Public Records Act (Government Code § 6250 *et seq.*), unless exempt by law. Proposals will remain confidential until the Administration Committee has authorized award.

APPENDIX A, PRELIMINARY SCOPE OF WORK

The services to be performed by Consultant are described in this preliminary scope of work. The proposal to be prepared by the Consultant will detail how the Consultant will accomplish the tasks and deliverables contained in this preliminary scope of work as well as identify any other necessary tasks and deliverables and how they will be accomplished. Consultant may propose optional tasks or sub-tasks, along with corresponding budget and schedule, that may further help facilitate the completion of the project.

Tasks

Task 1: Strategic Approach

Consultant shall meet with MTC to discuss and agree-upon a broad strategic approach for the new representation of transportation supply. A two- or three-day, in-person meeting is envisioned. Questions to be decided at this meeting include, but are not limited to, the following:

- Representation of space
 - Should separate, nested zone systems be used to represent automobile behavior and non-motorized/transit behavior?
 - Should the zone system extend beyond the boundaries of the MTC planning area (defined as the nine counties that border the San Francisco Bay)?
 - Is a zone system even needed at all? Instead, can parcel geography be used with on-the-fly parcel-to-parcel and parcel-to/from-transit stop skim building procedures?
 - The MTC travel model currently builds ten separate transit paths for each origin/destination for each of five time periods. Should this approach be reconsidered with this new representation of space? If so, how?
- Roadway network representation
 - From which base map, OpenStreetMap or TeleAtlas/TomTom, should the network be derived?
 - Broadly, how should the roadway network be represented, stored, updated, and edited?
- Transit network representation
 - From which database, Google or MTC's Regional Transit database, should the network be derived?
 - Broadly, how should the transit network be represented, stored, updated, and edited?
- Pedestrian network representation
 - Broadly, how should the pedestrian network be represented, stored, updated, and edited?
- Bicycle network representation
 - Broadly, how should the bicycle network be represented, stored, updated, and edited?

Consultant shall lead the discussion; prepare a list of key questions; prepare discussion points for each question; prepare a list of pros and cons for each question; summarize the key points of the meeting in notes; and, prepare a technical memorandum outlining the selected approach.

- Deliverables:
- 1.1 Meeting materials
 - 1.2 Meeting notes and summaries
 - 1.3 Technical memorandum outlining the selected strategic approach

Task 2: Final Work Plan

Following MTC and Consultant concurrence on a strategic approach, Consultant shall prepare a final work plan, including a detailed scope, budget, schedule, computing resources plan, management plan, and staffing plan.

- Deliverables:
- 2.1 Work plan, including scope, budget, schedule, computing resources plan, staffing plan, and management plan

Task 3: Project Management

Consultant shall participate in weekly project management/update conference calls; participate in meetings with other agency personnel as needed; and, otherwise keep MTC informed as to the progress of the project.

- Deliverables:
- 3.1 Meeting notes and summaries

Task 4: Initial Representation of Space

Using the strategic approach developed in Task 1, Consultant shall develop a scheme for representing space in the travel model, be it with travel analysis zones (TAZs), parcels, or some combination of both. The representation must: (a) cover at least the nine-county Bay Area; (b) nest within counties; (c) consider 2010 Decennial Census geography; (d) consider MTC's existing zone system; (e) consider the zone systems of the Bay Area's Congestion Management Agencies; (f) consider the different scales at which automobiles and people are impacted by infrastructure; (g) identify the activity centroid of each spatial unit; (h) consider existing transportation infrastructure; (i) consider expected transportation infrastructure; (j) consider current land use patterns; and, (k) consider expected land use patterns.

Following the development of this proposed representation, Consultant shall identify each of the modifications needed to the MTC travel model necessary to accommodate the initial scheme.

- Deliverables:
- 4.1 Technical memorandum discussing the motivation for and details of the initial representation of space
 - 4.2 Interactive online maps of the proposed representation, presented with other geographies of interest (e.g. census tracts)
 - 4.3 Technical memorandum detailing the modifications needed to the existing model system to accommodate the initial representation of space

Task 5: Final Representation of Space

Consultant shall lead no more than nine separate discussions regarding the initial representation of space developed in Task 4 with technical personnel from each of the Bay Area's Congestion Management Agencies (CMAs) as well as personnel from counties within MTC's jurisdiction that are not part of a CMA. Consultant shall lead one discussion with MTC Planning Section staff and one discussion with ABAG staff regarding the initial representation of space. Consultant shall collect feedback from each of these groups for follow up conversations with MTC.

With MTC, Consultant shall use the input received from the CMAs, along with other information, to design and then document the final representation of space. Consultant shall revise Deliverable 4.3 as necessary.

Consultant shall then prepare the land use inputs and synthetic populations required to run the current MTC travel model for simulation years 2000, 2005, 2010, and the current year. This includes preparing the input socio-demographic zonal data files, preparing the inputs for and executing the population synthesizer, and preparing any other files that are impacted by the change to the representation of space.

- Deliverables:
- 5.1 Meeting notes and summaries
 - 5.2 Technical memorandum discussing the details of the final representation of space
 - 5.3 Interactive online maps of the final representation, overlaid with other geographies of interest
 - 5.4 Revised technical memorandum detailing the modifications needed to the existing model system to accommodate the final representation of space
 - 5.5 Year 2000, 2005, 2010, and current year travel model input files that needed to be modified as a result of the change in the representation of space

Task 6: Develop Roadway Networks

Using the strategic approach developed in Task 1, Consultant shall develop representations of the year 2000, 2005, 2010, and current year highway networks. The representation must include the following characteristics: (a) consistency with either OpenStreetMap or the TeleAtlas/TomTom network; (b) identification of links at which traffic data is being monitored,

including but not limited to the California Department of Transportation's Performance Measurement System (PeMS) and MTC's 511 system; (c) inclusion of every paved, public roadway in, at a minimum, the nine county Bay Area; (d) contains data, to the extent such data is readily available, needed to compute estimates of roadway capacity and free flow speed, including, for example, shoulder width and grade; (e) includes so-called centroid connectors, which connect activity locations to the roadway network, in a consistent and logical manner; and, (f) contains all the data and special-link-representations (e.g. HOV lanes) needed to execute the current MTC travel model.

Using the information included in the roadway representation, Consultant shall propose methods for computing the following link-specific quantities, each of which is needed to execute the existing MTC travel model: (a) facility type; (b) area type; (c) free-flow travel speed; and, (d) capacity. Alternately, Consultant shall suggest other methods (from those in the current travel model) for relating volumes with congested speeds.

Following the development of the roadway network representation, Consultant shall identify each of the modifications needed to the MTC travel model necessary to accommodate the new network.

To streamline future updates of the roadway network (e.g. year 2015), Consultant shall propose procedures for updating the network such that consistency can be maintained between the current year roadway network and future year base map. Meaning, when OpenStreetMap or TeleAtlas/TomTom release a 2015 base map, how can MTC use this information to quickly update our roadway network?

- Deliverables:
- 6.1 Year 2000, 2005, 2010, and current year roadway binary network files
 - 6.2 Technical memorandum discussing procedures for updating the networks such that consistency can be maintained between the network and the underlying base map
 - 6.3 Technical memorandum discussing procedures for using roadway attributes to compute congested speeds
 - 6.4 Technical memorandum detailing the modifications needed to the existing model system to accommodate the roadway network representation

Task 7: Develop Transit Networks

Using the strategic approach developed in Task 1, Consultant shall develop representations of the year 2000, 2005, 2010, and current year transit networks. The representation must be consistent with both the representation of space designed in Task 5 and the representation of roads in Task 6. Further, the representation must include the following: (a) mechanisms that allow for consistency to be maintained between the network and either MTC's Regional Transit Database, which is a compilation of the information submitted by transit agencies to MTC to

support the 511.org trip planner, or Google's database of transit service; (b) ability to be stored in a series of geo-spatial relational databases; (c) ability for a user to edit the network in Cube format as well as for the entire database to be exported to a format accepted by the Cube software; (d) ability for a user to edit the network in Google transit feed format as well as for the entire database to be exported to Google transit feed format; (e) line files that can be readily and accurately depicted on maps; and, (f) contains all the data needed to execute the current MTC travel model.

Following the development of the transit network representation, Consultant shall identify each of the modifications needed to the MTC travel model necessary to accommodate the new network.

To streamline future updates of the transit network (e.g. year 2015), Consultant shall propose procedures for updating the network such that consistency can be maintained between the current year transit network and future year updates of the Google or MTC Regional Transit Databases. Meaning, when a new version of Google's transit trip planner or the Regional Transit Database is released in, say, 2015, how can MTC use this information to quickly update our transit network?

- Deliverables:
- 7.1 Year 2000, 2005, 2010, and current year transit network files
 - 7.2 Technical memorandum discussing procedures for updating the networks such that consistency can be maintained between the network and MTC's Regional Transit Database
 - 7.3 Technical memorandum detailing the modifications needed to the existing model system to accommodate the transit network representation

Task 8: Develop Pedestrian Network

Using the strategic approach developed in Task 1, Consultant shall develop representations of the year 2000, 2005, 2010, and current year pedestrian networks. The representation must be consistent with the representation of space designed in Task 5, the representation of roads in Task 6, and the representation of transit in Task 7.

MTC is aware that little information exists on pedestrian infrastructure, such as the presence, width and quality of sidewalks. The task here is to build the best representation of pedestrian infrastructure possible with existing data (such as slope), given the budget of this project.

Following the development of the pedestrian network representation, Consultant shall identify each of the modifications needed to the MTC travel model necessary to accommodate the new network.

- Deliverables: 8.1 Year 2000, 2005, 2010, and current year pedestrian

network files

8.2 Technical memorandum detailing the modifications needed to the existing model system to accommodate the pedestrian network representation

Task 9: Develop Bicycle Network

Using the strategic approach developed in Task 1, Consultant shall develop representations of the year 2000, 2005, 2010, and current year bicycle networks. The representation must be consistent with the representation of space designed in Task 5, the representation of roads in Task 6, the representation of transit in Task 7, and the representation of pedestrian infrastructure in Task 8.

MTC is aware that limited information exists on bicycle infrastructure. The task here is to build the best representation of bicycle infrastructure possible with existing data (such as slope), given the budget of this project. However, data collected in support of MTC's BikeMapper project should be of great use for this task.

To streamline future updates of the bicycle network (e.g. year 2015), Consultant shall propose procedures for updating the network such that consistency can be maintained between the current year transit network and future year updates of the MTC BikeMapper. Meaning, when a new version of the BikeMapper is released in, say, 2015, how can MTC use this information to quickly update our bicycle network?

Following the development of the bicycle network representation, Consultant shall identify each of the modifications needed to the MTC travel model necessary to accommodate the bicycle network.

- Deliverables:
- 9.1 Year 2000, 2005, 2010, and current year bicycle network files
 - 9.2 Technical memorandum discussing procedures for updating the networks such that consistency can be maintained between the network and MTC's BikeMapper
 - 9.3 Technical memorandum detailing the modifications needed to the existing model system to accommodate the bicycle network representation

Task 10: Modify Existing Travel Model

Consultant shall modify the existing MTC travel model to accommodate the new representations of space, roadways, transit, pedestrian infrastructure, and bicycle infrastructure. This will require changes to input files, Cube scripts, Java software and/or other model components. Consultant shall implement the changes and execute the travel model for simulation years 2000, 2005, and 2010.

Note that re-calibration and re-validation of the model is not included as part of this project. Rather, MTC seeks assistance with simply re-building the model structure to accommodate the new representations of supply.

Following the implementation of the changes within the travel model, Consultant shall perform error checking adequate to ensure the updated procedures are operating as intended.

Finally, Consultant shall suggest a list of specific items MTC should consider to better take advantage of the increased detail now included in the model system.

- Deliverables:
- 10.1 Complete, executed model run scenario files for year 2000, 2005, and 2010 simulations, including input files, model scripts, and software
 - 10.2 Technical memorandum detailing each of the changes made to the model system as well as any necessary input assumptions made during the conversion
 - 10.3 Technical memorandum detailing the error checking procedures undertaken to ensure the changes to the system were implemented correctly
 - 10.4 Technical memorandum of suggested structural improvements MTC should consider in our next round of model development to take advantage of the improved representation of supply

APPENDIX B, COST AND PRICE ANALYSIS FORM¹

COST AND PRICE ANALYSIS - RESEARCH AND DEVELOPMENT CONTRACTS				
This form is to be used in lieu of FAA Form 3515 as provided under FAPR 2-16.260-2, it will be executed and submitted with proposals in response to "Requests for Proposals," for procurement of research and development services. If your cost accounting system does not permit analysis of costs as required, contact the purchasing office for further instructions.			PURCHASE REQUEST NUMBER	
NAME AND ADDRESS OF OFFERER		TITLE OF PROJECT		
DETAIL DESCRIPTION		ESTIMATED HOURS	RATE/HOUR	TOTAL ESTIMATED COST (Dollars)
1. DIRECT LABOR(Specify)				
TOTAL DIRECT LABOR				
2. BURDEN (Overhead-specify) Dept. or Cost Center		Burden Rate	X BASE	BURDEN (\$)
TOTAL BURDEN				
3. DIRECT MATERIAL				
TOTAL MATERIAL				
4. SPECIAL TESTING (Including field work at Government installations)				
TOTAL SPECIAL TESTING				
5. SPECIAL EQUIPMENT (If direct charge - specify in Exhibit B on reverse)				
6. TRAVEL (If direct charge)				
a. TRANSPORTATION				
b. PER DIEM OR SUBSISTENCE				
TOTAL TRAVEL				
7. ConsultantS (Identify - purpose - rate)				
TOTAL ConsultantS				
8. SUBCONTRACTORS (Specify in Exhibit A on reverse)				
9. OTHER DIRECT COSTS (Specify in Exhibit B on reverse - explain royalty costs, if any)				
10. TOTAL DIRECT COST AND BURDEN				
11. GENERAL AND ADMINISTRATIVE EXPENSE (Rate % of item nos.)				
12. TOTAL ESTIMATED COST				
13. FIXED FEE OR PROFIT (State basis for amount in proposal)				
14. TOTAL ESTIMATED COST AND FIXED FEE OR PROFIT				

¹ This document is available as an Excel spreadsheet by email upon request to Project Manager.

APPENDIX C, CALIFORNIA LEVINE ACT STATEMENT

California Government Code § 84308, commonly referred to as the “Levine Act,” precludes an officer of a local government agency from participating in the award of a contract if he or she receives any political contributions totaling more than \$250 in the 12 months preceding the pendency of the contract award, and for three months following the final decision, from the person or company awarded the contract. This prohibition applies to contributions to the officer, or received by the officer on behalf of any other officer, or on behalf of any candidate for office or on behalf of any committee.

MTC’s commissioners include:

Tom Azumbrado	Federal D. Glover	Kevin Mullin
Tom Bates	Mark Green	Bijan Sartipi
David Campos	Scott Haggerty	James P. Spering
Dave Cortese	Anne W. Halsted	Adrienne J. Tissier
Bill Dodd	Steve Kinsey	Amy Rein Worth
Dorene M. Giacomini	Sam Liccardo	Ken Yeager
	Jake Mackenzie	

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than \$250 to any MTC commissioner in the 12 months preceding the date of the issuance of this request for qualifications?

YES NO

If yes, please identify the commissioner: _____

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contributions of more than \$250 to any MTC commissioners in the three months following the award of the contract?

YES NO

If yes, please identify the commissioner: _____

Answering yes to either of the two questions above does not preclude MTC from awarding a contract to your firm. It does, however, preclude the identified commissioner(s) from participating in the contract award process for this contract.

DATE

(SIGNATURE OF AUTHORIZED OFFICIAL)

(TYPE OR WRITE APPROPRIATE NAME, TITLE)

(TYPE OR WRITE NAME OF COMPANY)

APPENDIX D, SYNOPSIS OF PROVISIONS IN MTC'S STANDARD CONSULTANT AGREEMENT

The selected Consultant will be required to sign MTC's standard Consultant agreement, a copy of which standard agreement may be obtained from the Project Manager for this RFP. In order to provide bidders with an understanding of some of MTC's standard contract provisions, the following is a synopsis of the major requirements in our standard agreement for professional services. **THE ACTUAL LANGUAGE OF THE STANDARD CONSULTANT AGREEMENT SUPERSEDES THIS SYNOPSIS.**

Termination: MTC may, at any time, terminate the Agreement upon written notice to Consultant. Upon termination, MTC will reimburse the Consultant for its costs for incomplete deliverables up to the date of termination. Upon payment, MTC will be under no further obligation to the Consultant. If the Consultant fails to perform as specified in the agreement, MTC may terminate the agreement for default by written notice following a period of cure, and the Consultant is then entitled only to compensation for costs incurred for work products acceptable to MTC, less the costs to MTC of rebidding.

Insurance Requirement: See *Appendix E, Insurance Requirements*, attached hereto.

Independent Contractor: Consultant is an independent contractor and has no authority to contract or enter into any other agreement in the name of MTC. Consultant shall be fully responsible for all matters relating to payment of its employees including compliance with taxes.

Indemnification: Consultant agrees to defend, indemnify and hold MTC harmless from all claims, damages, liability, and expenses resulting from any negligent or otherwise wrongful act or omission of Consultant in connection with the agreement. Consultant agrees to defend any and all claims, lawsuits or other legal proceedings brought against MTC arising out of such negligent or wrongful acts or omissions. The Consultant shall pay the full cost of the defense and any resulting judgments.

Data Furnished by MTC: All data, reports, surveys, studies, drawings, software (object or source code), electronic databases, and any other information, documents or materials ("MTC Data") made available to the Consultant by MTC for use by the Consultant in the performance of its services under this Agreement shall remain the property of MTC and shall be returned to MTC at the completion or termination of this Agreement. No license to such MTC Data, outside of the Scope of Work of the Project, is conferred or implied by the Consultant's use or possession of such MTC Data. Any updates, revisions, additions or enhancements to such MTC Data made by the Consultant in the context of the Project shall be the property of MTC.

Ownership of Work Product: All data, reports, surveys, studies, drawings, software (object or source code), electronic databases, and any other information, documents or materials ("Work Product") written or produced by the Consultant under this Agreement and provided to MTC as a deliverable shall be the property of MTC. Consultant will be required to assign all rights in copyright to such Work Product to MTC.

Personnel and Level of Effort: Personnel assigned to this Project and the estimated number of hours to be supplied by each will be specified in an attachment to the Agreement. No substitution of personnel or substantial decrease of hours will be allowed without prior written approval of MTC.

Subcontracts: No subcontracting of any or all of the services to be provided by Consultant shall be allowed without prior written approval of MTC. MTC is under no obligation to any subcontractors.

Consultant's Records: Consultant shall keep complete and accurate books, records, accounts and any and all work products, materials, and other data relevant to its performance under this Agreement. All such records shall be available to MTC for inspection and auditing purposes. The records shall be retained by Consultant for a period of not less than four (4) years following the fiscal year of the last expenditure under this Agreement.

Prohibited Interest: No member, officer or employee of MTC can have any interest in this agreement or its proceeds and Consultant may not have any interest which conflicts with its performance under this Agreement.

Governing Law. The Agreement shall be governed by the laws of the State of California.

APPENDIX E, INSURANCE REQUIREMENTS

Minimum Insurance Coverages. Consultant shall, at its own expense, obtain and maintain in effect at all times the following types of insurance against claims, damages and losses due to injuries to persons or damage to property or other losses that may arise in connection with the performance of work under this Agreement, placed with insurers with a Best's rating of A-X or better.

<p>Yes (√)</p>	<p>Please certify by checking the boxes at left that required coverages will be provided within five (5) days of MTC's notice to firm that it is the successful proposer.</p>
<p>—</p>	<p><u>Workers' Compensation Insurance</u> in the amount required by the applicable laws, and Employer's Liability insurance with a limit of not less than \$1,000,000 per employee and \$1,000,000 per occurrence, and any and all other coverage of Consultant's employees as may be required by applicable law. Such policy shall contain a Waiver of Subrogation endorsement in favor of MTC. Such Workers Compensation & Employers Liability may be waived, if and only for as long as Consultant is a sole proprietor with no employees.</p>
<p>—</p>	<p><u>Commercial General Liability Insurance</u> for Bodily Injury and Property Damage liability, covering the operations of Consultant and Consultant's officers, agents, and employees and with limits of liability which shall not be less than \$1,000,000 combined single limit per occurrence with a general aggregate liability of not less than \$2,000,000, and Personal & Advertising Injury liability with a limit of not less than \$1,000,000. Expense for Indemnitee's defense costs shall be outside of policy limits and such policy shall be issued on a Duty to Defend Primary Occurrence Form. MTC, and its commissioners, officers, representatives, agents and employees are to be named as additional insureds. Such insurance as afforded by this endorsement shall be primary as respects any claims, losses or liability arising directly or indirectly from Consultant's operations.</p>
<p>—</p>	<p><u>Business Automobile Insurance</u> for all automobiles owned, used or maintained by Consultant and Consultant's officers, agents and employees, including but not limited to owned, leased, non-owned and hired automobiles, with limits of liability which shall not be less than \$1,000,000 combined single limit per occurrence.</p>
<p>—</p>	<p><u>Errors and Omissions Professional Liability Insurance</u> (if applicable) in an amount no less than \$1,000,000. If such policy is written on a "Claims-Made" (rather than an "occurrence") basis, Consultant agrees to maintain continuous coverage in effect from the date of the commencement of services to at least three (3) years beyond the termination or completion of services or until expiration of any applicable statute of limitations, whichever is longer. The policy shall provide coverage for all work performed by the Consultant and any work performed or conducted by any subcontractor/Consultant working for or performing services on behalf of the Consultant. No contract or agreement between the Consultant and any subcontractor/Consultant shall relieve the Consultant of the responsibility for providing this Errors & Omissions or Professional Liability coverage for all work performed by the Consultant and any subcontractor/Consultant working on behalf of the Consultant on the project.</p>
<p>—</p>	<p><u>Property Insurance</u> covering Consultant's own business personal property and equipment to be used in performance of this Agreement, materials or property to be purchased and/or installed on behalf of MTC (if any), debris removal, and builders risk for property in the course of construction (if applicable). Coverage shall be written on a "Special</p>

Form" ("All Risk") that includes theft, but excludes earthquake, with limits at least equal to the replacement cost of the property. Such policy shall contain a Waiver of Subrogation in favor of MTC. If such insurance coverage has a deductible, the Consultant shall also be liable for the deductible.

Deductibles: Any deductibles or self-insurance retentions over \$100,000 are subject to the approval of MTC.

Notice of Termination: Contractor shall give written notice to MTC within 10 business days of cancellation, non-renewal or material change of coverage in the policy or policies for any reasons, and shall also provide notice of such change any other additional insured.

Additional Provisions: Each policy or policies of insurance described in Commercial General Liability Insurance, above shall contain the following provisions:

- Inclusion of MTC, its commissioners, officers, representatives, agents and employees, as additional insured's with respect to work or operations in connection with this Agreement.
- Endorsement providing that such insurance is primary insurance and no insurance of MTC will be called on to contribute to a loss.

Certificates of Insurance: Promptly on execution of this Agreement and prior to commencement of any work hereunder, Contractor shall deliver to MTC Certificates of Insurance verifying the aforementioned coverages. Such certificates shall make reference to all provisions and endorsements referred to above and shall be signed on behalf of the insurer by an authorized representative thereof. Contractor agrees, upon written request by MTC, to furnish copies of such policies or endorsements required under the Agreement prior to the Effective Date of the Agreement.

Disclaimer: The foregoing requirements as to the types of limits of insurance coverage to be maintained by Contractor are not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by Contractor pursuant hereto, including, but not limited to, liability assumed pursuant to *Appendix D*, Indemnification.

Subcontractor's Insurance: Contractor shall require each of its subcontractors to provide the aforementioned coverages, unless such coverages are waived or reduced in writing by the MTC Project Manager.

By signing below, you acknowledge and agree to provide the required certificate of insurance providing verification of the minimum insurance requirements listed above within five (5) days of MTC's notice to firm that it is the successful proposer.

Representative Name and Title	
Name of Authorizing Official	
Authorized Signature	
Date	

NOTE: If you were unable to check "Yes" for any of the required minimum insurance coverages listed above, a request for exception to the appropriate insurance requirement(s) must be brought to MTC's attention no later than the date for protesting RFP provisions. If such objections are not brought to MTC's attention consistent with the protest provisions of this RFP, compliance with the insurance requirements will be assumed.