

REPORT TO SHASTA COUNTY RTPA

SUBJECT	MEETING DATE	ITEM NUMBER
ShastaFORWARD>> Public Involvement Support Services Agreement	6/26/07	5

RECOMMENDATION

It is recommended that the Board take the following actions related to the ShastaFORWARD>> regional growth visioning project:

1. Authorize the Chair to execute the attached Personal Services Agreement (Agreement) with Moore & Associates, Inc. in a base amount not to exceed \$188,384 for public involvement related services; and
2. Authorize the Executive Officer to expend contingency funds (not to exceed an additional \$14,265) as specified in the Agreement for the purpose of carrying out unanticipated additional or modified work tasks.

SUMMARY

ShastaFORWARD>> is the Board's long-range regional growth visioning project for Shasta County. The consulting firm Moore & Associates was recommended via a competitive Request for Proposal (RFP) process to assist the Board with an aggressive public engagement program. Fees specified within the Agreement for such services are consistent with the project budget as outlined in the original grant application and approved by the Board.

DISCUSSION

ShastaFORWARD>> is the Board's long-range regional growth visioning project for Shasta County. As this will be the first study of its kind in the region, a significant portion of the work scope is dedicated to project marketing, mass media advertising, and public communication and engagement.

As directed by the Board on April 17, 2007, the attached RFP was prepared and made available to potential consulting firms. In response to this RFP, two proposals were received from able and qualified firms. Proposals were evaluated based on 1) project understanding; 2) experience and qualifications; 3) strategic approach in meeting project objectives; and 4) performance commitment.

The attached Moore & Associates proposal most effectively met the evaluation criteria and subsequent interviews were conducted. Staff supports the attached evaluation results summary and recommends that the Board authorize the chair to execute the attached Agreement. Prominent services/deliverables in this agreement include, but are not limited to, the following:

- Marketing plan,
- Multi-media graphic design work (including print, video, public display, and web-ready),

- Negotiation and purchase of mass media, press releases, and media information packets,
- Website development and maintenance,
- Public open house assistance,
- Pre/Post telephone surveys,
- Focus groups, and
- Final Project Report.

The Agreement is structured to only draw upon those services needed from the above "tool box" as opposed to a fixed scope and fixed deliverables. Staff will authorize the work in segments as needed based on a specific scope and budget agreed to for that segment.

Up to \$60,000 of the \$188,384 is for media purchases such as ads and television air time. The consultant has agreed to broker the media purchases and bill only for the actual cost of the media purchased items with no additional compensation. Staff recommends approval of the Agreement.

ALTERNATIVES

The Board may choose not to execute the attached Agreement. This is not recommended as the deliverables specified therein are required to proceed with the ShastaFORWARD>> regional growth plan.

OTHER AGENCY INVOLVEMENT

The proposal evaluation team was comprised of individuals from the City of Redding, Shasta County Public Health, and the Shasta County RTPA. Moore & Associates was ranked highest by all evaluators. The Technical Advisory Committee (TAC) has reviewed this item and recommends approval.

FINANCING

The total project budget is \$746,800, which includes a \$375,000 State Planning & Research (SPR) grant. Local match funds programmed in our Overall Work Program (OWP) exceed the minimum required local match (20%). Staff anticipates receiving additional grant funds in subsequent cycles. The proposed Agreement costs are within the project budget.

Daniel S. Little, AICP, Executive Officer

DSL/DTW/jac

Attachments: Proposal Evaluation Summary
 Personal Services Agreement

ShastaFORWARD >> Public Involvement Services

Proposal Evaluation Summary

Firm Name	Project Understanding	See below for explanation of evaluation criteria			Total Points
		Experience and Qualifications	Level of Effort	Performance Strategy/Plan	
PMC	26/40	36/40	25/40	29/40	116/160
Moore & Associates	37/40	35/40	36/40	35/40	143/160

Project Understanding: Responsiveness to Request for Proposals, including clarity and efficacy of the approach to achieve the cited objectives. Proposals that provide a focused and concise response to the SCRTPA's needs and that demonstrate an understanding of community and transportation planning principles were considered favorably.

Experience and Qualifications: Demonstrated capabilities and technical expertise of the project team in the specialized areas of work. Demonstrated ability to provide necessary services in this region.

Level of Effort: Reasonableness of fee proposal relative to the level of effort associated with the proposed work scope.

Performance Commitment: Statement and specific project management strategies employed to guarantee the timeliness and completeness of all deliverables.

**PERSONAL SERVICES AGREEMENT BETWEEN
THE SHASTA COUNTY REGIONAL TRANSPORTATION PLANNING AGENCY AND
MOORE & ASSOCIATES, INC.**

This agreement is entered into between the Shasta Regional Transportation Planning Agency, ("The SCRTPA") and Moore & Associates, Inc. ("Consultant") for the purpose of public involvement services related to the Shasta Regional Blueprint Plan ("ShastaFORWARD>>")..

1. RESPONSIBILITIES OF CONSULTANT.

- A. Consultant shall perform public involvement services and provide deliverables as specified in **Attachment C: "Consultant Proposal"**.
- B. Services will be authorized in stages based on separate authorizations to proceed. Each request for services pursuant to this agreement shall refer to this agreement and specifically state that the terms of this agreement are incorporated. Requests for a particular service will specify the scope, deliverables, budget and date by which each authorized service is provided. Consultant shall complete and provide the required services by the due date specified in each County authorization.
- C. As required by Government Code section 7550, each document or report prepared by Consultant for or under the direction of The SCRTPA pursuant to this agreement shall contain the numbers and dollar amount of the agreement and all subcontracts under the agreement relating to the preparation of the document or written report. If multiple documents or written reports are the subject of the agreement or subcontracts, the disclosure section may also contain a statement indicating that the total contract amount represents compensation for multiple documents or written reports. Consultant shall label the bottom of the last page of the document or report as follows: department name, agreement number, and dollar amount. If more than one document or report is produced under this agreement, Consultant shall add: "This [document or report] is one of [number] produced under this agreement."]

2. RESPONSIBILITIES OF THE SCRTPA.

- A. The SCRTPA shall compensate Consultant as set forth in section [3] of this agreement and shall monitor Consultant's performance.
- B. The SCRTPA shall provide those services labeled "SCRTPA to Provide", as provided in **Attachment A: Request for Proposals"**.

3. COMPENSATION.

Consultant shall be compensated based on hourly rates plus direct expenses per **Attachment B: "2007 Rate Schedule"**.

- A. Compensation for tasks as described in **Attachment C: "Consultant Proposal"**, shall not exceed \$128,384.

- B. Upon written authorization from the SCRTPA, consultant shall also be compensated for labor and direct expenses up to but not exceeding an additional \$14,265 for the purpose of carrying out new or expanded work tasks as directed.
- C. Upon written authorization from the SCRTPA, Consultant shall also be compensated up to but not exceeding an additional \$60,000 for the purpose of media purchases, guest travel expenses, and hospitality.

4. BILLING AND PAYMENT.

Consultant shall submit to the SCRTPA within 30 days after completion of the services described in section 1, an itemized statement or invoice of services rendered. The SCRTPA shall make payment within 30 days of receipt of Consultant's correct and approved statement.

5. TERM OF AGREEMENT.

- A. This agreement shall commence on the date of signing and shall terminate December 31, 2008.
- B. Should additional funding become available and if so authorized by the SCRTPA Board, this Agreement may be extended for up to two additional one-year terms, under the same terms and conditions, except as provided in Sections 1, 2, and 3.

6. TERMINATION OF AGREEMENT.

- A. If Consultant materially fails to perform duties to the satisfaction of the SCRTPA, or if Consultant fails to fulfill in a timely and professional manner obligations under this agreement, or if Consultant violates any of the terms or provisions of this agreement, then The SCRTPA shall have the right to terminate this agreement for cause effective immediately upon the SCRTPA giving written notice thereof to Consultant. If termination for cause is given by the SCRTPA to Consultant and it is later determined that Consultant was not in default or the default was excusable, then the notice of termination shall be deemed to have been given without cause pursuant to paragraph B of this section.
- B. The SCRTPA may terminate this agreement without cause on 30 days' written notice to Consultant. The SCRTPA shall pay consultant for all work satisfactorily completed as of the date of notice.
- C. The SCRTPA may terminate this agreement immediately upon oral notice should funding cease or be materially decreased during the term of this agreement.

- D. The SCRTPA's right to terminate this agreement may be exercised by the Executive Officer.
- E. Should this agreement be terminated, Consultant shall promptly provide to the SCRTPA any and all finished and unfinished reports, data, studies, photographs, charts and other documents prepared by Consultant pursuant to this agreement.
- F. If this agreement is terminated under Paragraph A above, Consultant shall only be paid for services completed and provided prior to notice of termination. In the event of termination under paragraph B or C above, Consultant shall be paid an amount which bears the same ratio to the total compensation authorized by the agreement as the services actually performed bear to the total services of Consultant covered by this agreement, less payments of compensation previously made. In no event, however, shall the SCRTPA pay Consultant an amount which exceeds a pro rata portion of the agreement total based on the portion of the agreement term that has elapsed on the effective date of the termination.

7. ENTIRE AGREEMENT; AMENDMENTS.

- A. This agreement supersedes all previous agreements relating to the subject of this agreement and constitutes the entire understanding of the parties hereto. Consultant shall be entitled to no other benefits other than those specified herein. Consultant specifically acknowledges that in entering into and executing this agreement, Consultant relies solely upon the provisions contained in this agreement and no others.
- B. No changes, amendments or alterations shall be effective unless in writing and signed by both parties. However, minor amendments which do not result in a substantial or functional change to the original intent of the agreement and do not cause an increase to the maximum amount payable under this agreement may be agreed to in writing between Consultant and Executive Officer.

8. NONASSIGNMENT OF AGREEMENT; NON-WAIVER.

Inasmuch as this agreement is intended to secure the specialized services of Consultant, Consultant may not assign, transfer, delegate or sublet any interest herein without the prior written consent of the SCRTPA. The waiver by the SCRTPA of any breach of any requirement of this agreement shall not be deemed to be a waiver of any other breach.

9. EMPLOYMENT STATUS OF CONSULTANT.

Consultant shall, during the entire term of this agreement, be construed to be an independent contractor and nothing in this agreement is intended nor shall be construed to create an employer-employee relationship, a joint venture relationship, or to allow The SCRTPA to exercise discretion or control over the professional manner in which Consultant performs the services which are the subject matter of this agreement; provided, however, that the services to be provided by Consultant shall be provided in a manner consistent with the professional standards applicable to such services. The sole interest of the SCRTPA is to insure that services shall be rendered and performed in a competent, efficient and satisfactory manner. Consultant shall be fully responsible for payment of all taxes due to the State of California or the federal government which would be withheld from compensation if Consultant were an SCRTPA employee. The SCRTPA shall not be liable for deductions for any amount for any purpose from Consultant's compensation. Consultant shall not be eligible for coverage under the SCRTPA's workers' compensation insurance plan nor shall Consultant be eligible for any other the SCRTPA benefit. Consultant must issue W-2 and 941 Forms for income and employment tax purposes, for all of Consultant's assigned personnel under the terms and conditions of this Agreement.

10. INDEMNIFICATION.

Consultant shall defend, hold harmless and indemnify the SCRTPA, its elected officials, officers, employees, agents and volunteers against all claims, suits, actions, costs, expenses (including but not limited to reasonable attorney's fees of the SCRTPA Counsel and counsel retained by the SCRTPA, expert fees, litigation costs, and investigation costs), damages, judgments or decrees by reason of any person's or persons' injury, including death, or property (including property of the SCRTPA) being damaged by the negligent acts, willful acts, or errors or omissions of the Consultant or any of Consultant's subcontractors, any person employed under Consultant, or under any subcontractor, or in any capacity during the progress of the work, except when the injury or loss is caused by the sole negligence or intentional wrongdoing of the SCRTPA. Consultant shall also defend and indemnify the SCRTPA for any adverse determination made by the Internal Revenue Service or the State Franchise Tax Board and/or any other taxing or regulatory agency and shall defend, indemnify and hold harmless the SCRTPA with respect to Consultant's "independent contractor" status that would establish a liability on the SCRTPA for failure to make social security deductions or contributions or income tax withholding payments, or any other legally mandated payment.

For professional services provided under this agreement, Consultant shall indemnify, defend, and hold harmless the SCRTPA, its elected officials, officers, employees, agents, and volunteers from and against any and all claims, demands, actions, losses, liabilities, damage, and costs, including reasonable attorneys' fees, arising out of or resulting from the negligent performance of the professional services provided under this agreement.

11. INSURANCE COVERAGE.

- A. Consultant and any subcontractor shall obtain, from an insurance carrier authorized to transact business in the State of California, and maintain continuously during the term of this agreement Commercial General Liability Insurance, including coverage for owned and non-owned automobiles, and other insurance necessary to protect the SCRTPA and the public with limits of liability of not less than \$1 million combined single limit bodily injury and property damage; such insurance shall be primary as to any other insurance maintained by the SCRTPA.
- B. Consultant and any subcontractor shall obtain and maintain continuously required Workers' Compensation and Employer's Liability Insurance to cover Consultant, subcontractor, Consultant's partner(s), subcontractor's partner(s), Consultant's employees, and subcontractor(s) employees with an insurance carrier authorized to transact business in the State of California covering the full liability for compensation for injury to those employed by Consultant or subcontractor. Consultant hereby certifies that Consultant is aware of the provisions of section 3700 of the Labor Code which requires every employer to insure against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code, and Consultant will comply with such provisions before commencing the performance of the work of this agreement.
- D. Consultant shall require subcontractors to furnish satisfactory proof to the SCRTPA that liability and workers' compensation and other required types of insurance have been obtained and are maintained similar to that required of Consultant pursuant to this agreement.
- E. With regard to all insurance coverage required by this agreement:
 - (1) Any deductible or self-insured retention exceeding \$25,000 for Consultant or subcontractor shall be disclosed to and be subject to approval by the SCRTPA prior to the effective date of this agreement.
 - (2) If any insurance coverage required hereunder is provided on a "claims made" rather than "occurrence" form, Consultant or subcontractor shall maintain such insurance coverage with an effective date earlier or equal to the effective date of the agreement and continue coverage for a period of three years after the expiration of the agreement and any extensions thereof. In lieu of maintaining post-agreement expiration coverage as specified above, Consultant or subcontractor may satisfy this provision by purchasing tail coverage for the claims-made policy. Such tail coverage shall, at a minimum, provide coverage for claims received and reported three years after the expiration date of the agreement.
 - (3) All insurance (except workers' compensation and professional liability) shall include an endorsement or an amendment to the policy of insurance which names *the SCRTPA, its elected officials, officers, employees, agents and*

volunteers as an additional insured and provides that coverage shall not be reduced or canceled without 30 days written prior notice certain to the SCRTPA. The Additional Insured coverage shall be equal to Insurance Service Office endorsement CG 20 10 for on-going operations and CG 20 37 for completed operations.

- (4) Each insurance policy (except for workers' compensation and professional liability policies), or endorsement thereto, shall contain a "separation of insureds" clause which shall read:

"Separation of Insureds.

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this Coverage Part to the first Named Insured, this insurance applies:

- a. As if each Named Insured were the only Named Insured; and
 - b. Separately to each suit insured against whom a claim is made or suit is brought."
- (5) Consultant shall provide the SCRTPA with an endorsement or amendment to Consultant's policy of insurance as evidence of insurance protection before the effective date of this agreement.
- (6) The insurance required herein shall be in effect at all times during the term of the agreement. In the event any insurance coverage expires at any time during the term of the agreement, Consultant shall provide, at least 20 days prior to said expiration date, a new endorsement or policy amendment evidencing insurance coverage as provided for herein for not less than the remainder of the term of the agreement or for a period of not less than one year. In the event Consultant fails to keep in effect at all times insurance coverage as herein provided and a renewal endorsement or policy amendment is not provided within 10 days of the expiration of the endorsement or policy amendment in effect at inception of the agreement, the SCRTPA may, in addition to any other remedies it may have, terminate the agreement upon the occurrence of such event and pay in full all contractual invoices for work completed prior to expiration of insurance.
- (7) If the endorsement or amendment does not reflect the limits of liability provided by the policy of insurance, Consultant shall provide the SCRTPA a certificate of insurance reflecting those limits.

12. NOTICE OF CLAIM/APPLICABLE LAW/VENUE.

- A. If any claim for damages is filed with Consultant or if any lawsuit is instituted concerning Consultant's performance under this agreement and that in any way, directly or indirectly, contingently or otherwise, affects or might reasonably affect the SCRTPA, Consultant shall give prompt and timely notice thereof to the SCRTPA. Notice shall be prompt and timely if given within 30 days following the date of receipt of a claim or ten days following the date of service of process of a lawsuit.
- B. Any dispute between the parties, and the interpretation of this agreement, shall be governed by the laws of the State of California. Any litigation shall be venued in Shasta County.

13. COMPLIANCE WITH LAWS; NON-DISCRIMINATION.

- A. Consultant will observe and comply with all applicable federal, state and local laws, ordinances and codes which relate to the services to be provided pursuant to this agreement.
- B. Consultant will not discriminate in employment practices or in the delivery of services on the basis of race, color, creed, national origin, sex, age, marital status, sexual orientation, medical condition (including cancer, HIV and AIDS) physical or mental disability or use of family care leave.
- C. Consultant represents that Consultant is in compliance with and agrees that Consultant will continue to comply with the Americans with Disabilities Act of 1990 (42 U.S.C. section 12101, *et seq.*), the Fair Employment and Housing Act (Government Code sections 12900, *et seq.*), and regulations and guidelines issued pursuant thereto.

14. ACCESS TO RECORDS/RETENTION.

SCRTPA, federal and state officials shall have access to any books, documents, papers and records of Consultant which are directly pertinent to the subject matter of this agreement for the purpose of auditing or examining the activities of Consultant or the SCRTPA. Except where longer retention is required by federal or state law, Consultant shall maintain all records for five years after the SCRTPA makes final payment hereunder.

15. CONSULTANT'S COMPLIANCE WITH CHILD, FAMILY AND SPOUSAL SUPPORT REPORTING OBLIGATIONS.

Consultant's failure to comply with state and federal child, family and spousal support reporting requirements regarding Consultant's employees or failure to implement lawfully served wage and earnings assignment orders or notices of assignment relating to child, family and spousal support obligations shall constitute a default under this Agreement. Consultant's failure to cure such default within 90 days of notice by the SCRTPA shall be grounds for termination of this agreement.

16. LICENSES AND PERMITS.

Consultant shall possess and maintain all necessary licenses, permits, certificates and credentials required by the laws of the United States, the State of California, the SCRTPA and all other appropriate governmental agencies, including any certification and credentials required by the SCRTPA. Failure to maintain the licenses, permits, certificates, and credentials shall be deemed a breach of this agreement and constitutes grounds for the termination of this Agreement by the SCRTPA.

17. PERFORMANCE STANDARDS.

Consultant shall perform the services required by this agreement in accordance with the industry and/or professional standards applicable to Consultant's services.

18. CONFLICTS OF INTEREST.

Consultant and Consultant's officers and employees shall not have a financial interest, or acquire any financial interest, direct or indirect, in any business, property or source of income which could be financially affected by or otherwise conflict in any manner or degree with the performance of services required under this agreement.

19. NOTICES.

- A. Any notice required to be given pursuant to the terms and provisions of this agreement shall be in writing and shall be sent first-class mail to the following addresses:

If to the SCRTPA:

**Shasta County RTPA
Attn: Daniel Wayne, Senior Planner
1855 Placer St
Redding, CA 96001-1759**

If to Consultant:

**Moore & Associates
28159 Avenue Stanford, Suite 110
Valencia, CA 91355-1106**

- B. Notice shall be deemed to be effective three days after mailing.

20. CONFIDENTIALITY.

During the term of this agreement, both parties may have access to information that is confidential or proprietary in nature. Both parties agree to preserve the confidentiality of and to not disclose any such information to any third party without the express written consent of the other party or as

required by law. This provision shall survive the termination, expiration, or cancellation of the agreement.]

21. SCOPE AND OWNERSHIP OF WORK.

All research data, reports, and every other work product of any kind or character arising from or relating to this agreement shall become the property of the SCRTPA and be delivered to the SCRTPA upon completion of its authorized use pursuant to the agreement. The SCRTPA may use such work products for any purpose whatsoever. All works produced under this agreement shall be deemed works produced by a contractor for hire, and all copyright with respect thereto shall vest in the SCRTPA without payment of royalty or any other additional compensation. Notwithstanding anything to the contrary contained in this agreement, Consultant shall retain all of its rights in its own proprietary information, including, without limitation, its methodologies and methods of analysis, ideas, concepts, expressions, know how, methods, techniques, skills, knowledge and experience possessed by the Consultant prior to, or acquired by the Consultant during the performance of this agreement and the Consultant shall not be restricted in any way with respect thereto.

22. USE OF THE SCRTPA PROPERTY.

Consultant shall not use the SCRTPA premises, property (including equipment, instruments and supplies), or personnel for any purpose other than in the performance of Consultant's obligations under this agreement.

23. SEVERABILITY.

If any portion of this agreement or application thereof to any person or circumstance is declared invalid by a court of competent jurisdiction or if it is found in contravention of any federal or state statute or regulation or county ordinance, the remaining provisions of this agreement, or the application thereof, shall not be invalidated thereby and shall remain in full force and effect to the extent that the provisions of this agreement are severable.

IN WITNESS WHEREOF, the SCRTPA and Consultant have executed this agreement on the day and year set forth below.

THE SCRTPA

Date: _____

Norma Connick, Chair
Shasta County RTPA

CONSULTANT

Jim Moore

Tax I.D.#: 58-2979418

Approved as to form:

Liz Johnson
SCRTPA Counsel

Liz Johnson

Attachment A: “Request for Proposals”

REQUEST FOR PROPOSALS

Shasta *FORWARD* >>
Public Involvement
Services

Inquiries: Questions regarding this
solicitation should be directed to:

Daniel Wayne
Senior Transportation Planner
(530) 225-5486

Submittals: Proposals (four copies) must
be received no later than 5:00 pm
on Wednesday, June 6, 2007

Contents:

I	OVERVIEW.....	2
II	BACKGROUND	3
III	SCOPE OF SERVICES	4
	Task A Internal Kick-Off Meeting.....	4
	Task 1 Setting the Stage	4
	Task 2 Community Awareness, Education & Engagement.....	5
	Task 3 Explore and Refine Potential Growth Themes	7
	Task 4 Presentation of Regional Growth Scenarios	8
	Task 5 Selection of Preferred Regional Growth Scenario.....	9
	Task 6 Community Summit/Final Report.....	10
IV	SERVICES TO BE PROVIDED BY THE SCRTPA.....	11
V	SCHEDULE.....	12
VI	COMPENSATION	12
VII	PROPOSAL REQUIREMENTS	13
VIII	SELECTION CRITERIA AND PROCESS.....	15
IX	CONTRACT CONDITIONS.....	15
	Synopsis of Public Involvement Plan.....	Exhibit A
	Graphical Interface Samples	Exhibit B
	SCRTPA's Standard Personal Services Contract	Exhibit C

REQUEST FOR PROPOSALS

Shasta*FORWARD>>*
Public Involvement Services

I OVERVIEW

The Shasta County Regional Transportation Planning Agency (SCRTPA) is seeking a qualified firm to assist in informing and engaging the general public and key decision-makers in regard to Shasta*FORWARD>>*, Shasta County's regional growth visioning process. The scope of work as described herein does not reflect all tasks required to complete the project; rather it represents those portions of the overall scope of work where specialized expertise or assistance is needed.

As some work tasks will be divided or shared between the consultant and SCRTPA staff, SCRTPA desires a project partner that can function as an integral part of the local project team and that will complete work tasks independently. The physical presence of the consultant's assigned project manager and support staff is critical due to the large number and variety of meetings, presentations, and public engagement efforts. Non-local firms are encouraged to submit a proposal, but should demonstrate an ability and willingness to travel to Shasta County, possibly on short notice.

In preparation for developing your proposal, firms are encouraged to review communication and public engagement efforts, strategies, and outcomes of other scenario planning efforts. Examples of recent projects include but are not limited to 'MyRegion' (www.myregion.org) and 'Envision Utah' (www.envisionutah.org). Through the State's Regional Blueprint Program, a number of projects in California have also been completed or are currently underway. Additional information about the Blueprint program is available from Caltrans online at:

<http://www.dot.ca.gov/hq/tpp/offices/orip/Blueprint.htm>.

Interested firms are invited to submit technical and fee proposals for work in accordance with the requirements outlined herein. The selected proposer will be asked to enter into a formal agreement for the subject services and to provide insurance certificates and other assurances as noted.

This solicitation in no way obligates the SCRTPA to award a contract for the services described herein, nor will the SCRTPA assume any liability for the costs incurred in the preparation and transmittal of proposals in response to this solicitation. The SCRTPA reserves the right to not accept any proposal, to reject any or all proposals, to reject any part of any proposal, to negotiate and modify any proposal, and to waive any defects or irregularities in any proposal at the SCRTPA's sole discretion. Furthermore, the SCRTPA shall have the sole discretion to award the contract as it may deem appropriate to best serve the interests of the SCRTPA. In this regard, the SCRTPA may consider demonstrated quality of work, responsiveness, comparable experience, professional qualifications, assigned personnel, references, and proposed fees.

If you have questions regarding this solicitation, please contact Daniel Wayne, Senior Transportation Planner at (530) 225-5486.

II BACKGROUND

Shasta*FORWARD>>* is intended to better inform regional and local decision-making via a broad-based, interactive public and stakeholder engagement process. The Shasta*FORWARD>>* planning process includes innovative, digital map-based visualizations of alternative regional growth ‘scenarios’, whereby the long-term consequences of today’s decisions can be observed and explored in greater detail. Following an extensive public and stakeholder engagement process, a preferred growth scenario will be selected and policies and standards consistent with the region’s vision will be encouraged. The stated goals of the California Regional Blueprint Planning Program include the following:

1. Foster a more efficient land use pattern that (a) supports improved mobility and reduced dependency on single-occupant vehicle trips, (b) accommodates an adequate supply of housing for all incomes, (c) reduces impacts on valuable habitat, productive farmland, and air quality, (d) increases resource use efficiency, and (e) results in safe and vibrant neighborhoods.
2. Provide consumers more housing and transportation choices.
3. Improve California’s economic competitiveness and quality of life.
4. Reduce costs and time needed to deliver transportation projects through informed early public and resource agency involvement.
5. With the aid of innovative computer models and public involvement activities, secure local government and community support (including that of under-represented groups) necessary to arrive at a shared comprehensive vision.
6. Establish a replicable process for public and stakeholder engagement to build awareness of and support for critical infrastructure and housing needs.

The Shasta*FORWARD>>* project area (where the actual scenario development will occur) encompasses all of Shasta County with an emphasis on those areas most likely to incur growth. Due to environmental, social, and economic connectivity with neighboring Tehama County, the project will also include a discussion of growth occurring in north-central Tehama area along the Interstate 5 corridor. The northern Sacramento Valley is an ‘urbanizing’ region, where relatively small course corrections affect major change and community goals can often be achieved without having to undo the past. The challenge of creating a long-range growth plan in an urbanizing area – where the full effect of growth may not yet be fully apparent – is

effectively communicating the region's growth issues and the role that long range planning plays in the future form, function, health, and prosperity of the region.

As this will be the first study of its kind in the region, a significant portion of the Shasta Area Regional Blueprint's work scope is dedicated to project information and awareness, marketing and advertising, and documentation of the public engagement process. The ultimate goal of the public involvement process is a 'call-to-action' – an informed vote on their preferred development scenario. The resulting vision will be used to develop public policies in support of this scenario.

Addition information specific to the Shasta Area Regional Blueprint Plan is available from the SCRTPA online at: <http://www.scrtpa.org/RTBlueprint.htm>. Interested firms are encouraged to review available documents in preparation for submitting a proposal.

III SCOPE OF SERVICES

The following tasks are not entirely exclusive but are generally intended to be completed sequentially. Some tasks may be ongoing, with portions of work conducted throughout the project schedule. As the selected firm will be working in conjunction with SCRTPA staff, the list of deliverables for each respective task is preceded by a general overview, illustrating how these tasks relate to the overall project. To assist in preparing proposals, a one page synopsis of the public involvement plan is attached (Exhibit A).

Task A Internal Kick-Off Meeting

Following execution of the contract agreement, an internal kick-off meeting will be held between SCRTPA project manager, consultant project manager, and other key personnel as appropriate. At this meeting communication protocol will be established, project schedule finalized, and next steps determined.

Task 1 Setting the Stage

A kick-off event will provide an introduction to scenario planning and a preview of Shasta *FORWARD* to elected officials, policymakers, community leaders, and other key stakeholders within the region. Topics of discussion are anticipated to include project goals and objectives, planning tools and methods, public outreach and communications strategies, and deliverables and implementation efforts.

To build a conceptual understanding and garner support for the project, best practices will be highlighted and expert guest(s) will be invited to provide a first-hand perspective in regard to the public's response to and the ultimate utility of scenario planning. Audience Response System (ARS) technology will be employed to 1) obtain general information about who

participants are, 2) obtain real-time feedback to help facilitate the discussion, and 3) promote consensus building.

Prior to the kick off event, a media kit will be prepared and a list of media contacts developed. Kick-off event participants will preview media information kits prior to distribution.

Objective:

A well-informed and supportive body of elected officials, decision-makers, and key community stakeholders.

Deliverables:

- 1) Prepare invitations to kick-off meeting (audience: elected officials, policymakers, community leaders, and other key stakeholders)
- 2) List of all newspaper, television, radio, internet news, and other media outlets in the project area. The following information shall be provided for each outlet: a) individual contact information, b) geographic coverage area, and c) audience demographics. An overview including the total number and percentage or regional households reached within the combined geographic coverage area shall also be provided.
- 3) Design and distribute media information kits (quantity to be determined by media list)

SCRTPA to Provide: Content and agenda for kick-off meeting; arrangements and expenses for special guest(s); invitation list and distribution of kick-off meeting invitations; audience response system (ARS)

Helpful hint: Proposals should clearly demonstrate their firm's familiarity and working relationship with local media outlets and explain how this expertise will benefit the project

Task 2

Community Awareness, Education & Engagement

A well-defined Community Awareness, Education, and Engagement (CAE&E) Plan is central to the visioning process. The CAE&E Plan shall make use of multiple methods/formats as appropriate to achieve both high impact *and* broad-based, comprehensive exposure to Shasta*FORWARD*>>. At the heart of the CAE&E Plan will be 1) public open houses, 2) targeted presentations to community groups, 3) an interactive internet site, and a 4) televised 'town hall' series.

The Plan shall be designed to effectively capture community and media attention to the point where talking about the project becomes entertaining, captivating, and newsworthy. Helping to make this goal achievable will be innovative visual outputs (such as digital maps of regional growth scenarios) and interactive tools (such as ARS). For

example, the 'current trends' scenario will be available at the onset of the process. Invariably this scenario serves as a reality check, spurring dialogue and creating the perfect segue for introducing regional growth planning. The CAE&E Plan shall capitalize on this and other unique elements to the greatest extent possible.

The structure of the CAE&E Plan should mirror the basic outline of this RFP. More specifically:

- I. Pre-project outreach (compare to Task 1)
- II. Create project awareness/pique community interest
- III. Assess community values (compare to Task 2)
- IV. Prioritize growth principles (compare to Task 3)
- V. Prepare public for voting period (compare to Task 4)
- VI. Call-to-action: preferred scenario voting (compare to Task 5)

Objective: To move beyond the typical public consultation process; to capture the attention of the public and engage them at the personal level because the message and format is in itself compelling. To obtain a representative summary of community values.

Deliverables:

- 1) Develop Community Awareness, Education & Engagement Plan
- 2) Administer statistically relevant random telephone survey for use as baseline public opinion/assessment of understanding
- 3) Develop project identity, including Shasta*FORWARD>>* logos, communication templates, and graphic design standards. Provide electronic copies of all such files on a CD.
- 4) Negotiate and make all necessary arrangements for mass media purchase as outlined in the Community Awareness, Education & Engagement Plan (direct cost for advertising to be borne by SCRTPA).
- 5) Design, development, and ongoing management of Shasta*FORWARD>>* website for duration of the project. Website shall include but not be limited to a) home page, b) latest news and information postings, c) document/resource library, and d) online surveying component. Website shall be regularly updated in order to maintain fresh content. Up to four surveys of varying format and type shall be adapted for web use and data collected. Website shall include a hidden page counter and a report of website activity provided to SCRTPA on a monthly basis. Website to be completed prior to initial public outreach activities. All updates and changes to the website shall be reviewed and accepted by SCRTPA. Proposal should include sufficient hours/resources necessary for ample review and testing prior to going live as well as for all significant additions or updates throughout the project.
- 6) Design of up to six project newsletters.

- 7) Prepare invitations to all media outlets to cover each public event.
- 8) Coordinate and advise SCRTPA in preparation for up to six open houses for the purpose of introducing the community to the project and obtaining a broad representation of community values as it relates to regional growth and development. Provide comprehensive documentation of all meetings as described in Task 6.
- 9) Design and production of up to six large-scale topical information boards with accompanying take-home information for public open houses. Draft display and handout materials to be provided a minimum of ten calendar days prior to the first open house. Proposal shall assume no less than two proofs prior to final production of all printed materials.

SCRTPA to Provide: Basic website content, modeling output (maps), ARS equipment; all direct advertising expenses; printing and distribution of newsletters and invitations; current trends model output

Helpful hint: SCRTPA has initiated discussions with KIXE (North State PBS station), to assist in production of a multi-episode television program on ShastaFORWARD>>. 'Program I' of the series will introduce the ShastaFORWARD>> project, discuss how scenario planning works, and unveil the Current Trends scenario. 'Program II' will unveil the alternative scenarios and commence the public voting period. Although not a requirement of the proposal, firms are encouraged to highlight any experience and expertise in the area of video production, and how the SCRTPA will benefit.

Task 3

Explore and Refine Potential Growth Themes

Regional growth 'themes' will be surmised from the compilation of public input gathered during Task 2. These themes – precursors to the alternative growth scenarios – will be extracted from emergent common threads of community values. Although not mutually exclusive, each resulting theme will place an emphasis on a particular growth strategy.

For illustration purposes, a theme may place an overriding emphasis on maintaining 'distinct urban areas', preserving 'green spaces', or on creating 'live, work, play' environments. Actual themes shall be a product of the public engagement process.

A summary will be presented to the public for prioritization. Based on outcome of public input, selected themes will form the basis of the scenario planning process in Task 4.

Objective: To capture, organize, and distill community values and priorities into select themes, in preparation for scenario modeling and informed decision-making.

Deliverables:

- 1) Facilitate up to three stakeholder/community leader focus groups utilizing ARS and/or other techniques as appropriate. Provide comprehensive documentation of all meetings as described in Task 6.
- 2) Develop visual preference and paired comparison survey for use in public meetings to assist in prioritization of growth principles. Adapt for online use.
- 3) Design and production of up to six large-scale topical information boards with accompanying take-home information for public open houses.
- 4) Develop graphical interface for final selected growth principles (refer to Exhibit B for examples); adapt for use in online, hardcopy, and ARS formats.

SCRTPA to Provide: Content and technical data, survey content, ARS equipment and set up.

Helpful hint: SCRTPA is purchasing the audience response system for the ShastaFORWARD>> project. This will be the first time using instant polling technology in a public forum. Please indicate in proposal any experience or expertise in relation to this technology and how this will benefit the project. For additional information about ARS technology, visit www.replysystems.com or www.turningtechnologies.com.

Task 4

Presentation of Regional Growth Scenarios

Based on output of Task 3, growth scenarios will be developed and prepared by the SCRTPA. Once completed, scenarios will be presented to the public in a map-based format, together with accompanying performance measures. A combination of outreach activities will facilitate understanding of each scenario and their respective advantages and disadvantages. Outreach efforts shall include up to four public open houses, online virtual presentation, and targeted presentations to community organizations. Such efforts shall culminate with 'Program 2: Alternative Scenario Deliberation'.

Objective: To put citizens in the seat of the policy-maker;

Deliverables:

- 1) Facilitate up to four public open houses
- 2) Poster size display boards, handouts, and other open house communication material as appropriate

- 3) Online virtual presentation of open house (i.e. interactive slide show/survey)

SCRTPA to Provide:

Primary graphics and general content; targeted community presentations; ARS equipment; performance measures and methodology

Helpful hint: Experience shows that multiple concepts and rounds of editing are required to achieve high quality print and online material. It is recommended that each proposal provide applicable experience and strategies employed to facilitate this process. Likewise, work plan and proposed fees should include sufficient time and allocation of staff hours to insure satisfactory deliverables.

Task 5

Selection of Preferred Regional Growth Scenario

Public outreach efforts shall be geared toward an informed vote on a preferred regional growth scenario by a representative cross-section of citizens. Utilizing a graphics-based public interface tool adaptable to print, web-based, and ARS instant polling survey formats, the public will be able to easily assess the relative advantages and disadvantages of each scenario and cast their vote.

This interface is composed of a two parts. Part I will provide a concise overview and map view of each scenario, plus a combined performance measure comparison table. Part II will provide an icon-based survey and questionnaire. Icons shall represent selected performance measures. Examples of potential performance measures include but are not limited to acres of conserved land, air quality, water usage, energy usage, transportation choices, average commute time, economic growth, infrastructure costs, range of housing type & density, agriculture land consumed, and so forth. Actual performance measures utilized in this project will be determined in conjunction with public and stakeholder input.

KIXE 'Program II' will be utilized in pre-recorded video form in up to six public open houses as well as in targeted outreach meetings with organizations/entities representing those with limited means or access to the planning process. ARS technology will be utilized in order to document demographic diversity of participants, facilitate discussion, and encourage full voting participation.

Objective: To empower citizens by providing a platform for communicating with policy-makers and elected officials; to provide a public interface which minimizes the time required to make an informed choice.

Deliverables:

- 1) Graphics-based public interface tool (refer to Exhibit B for samples) to facilitate public voting, including any necessary adaptations for use in print, web, and ARS formats.
- 2) Design print materials: a) 8.5x11 inch, 6 panel, full color overview brochure, and b) up to eight foam-board mounted display boards with accompanying handouts for use in presentations and public outreach meetings. All print material to be produced in a timely manner, including substantial opportunity to review proofs and revise prior to relevant project milestones.
- 3) Tracking of voting – how and when votes were received as it relates to outreach activities in order to help determine what outreach efforts were most effective.
- 4) Co-facilitate up to six public workshops

SCRTPA to Provide: ARS equipment; Program II: Presentation of Alternative Scenarios; Co-facilitation of public workshops

Task 6**Community Summit/Final Report**

In order to preserve and perpetuate input received throughout the project, a final project report will be created. The Report's audience includes the general public, policy-makers, elected officials, and other community leaders. As such, it should not be overly technical and include the best of all documentation compiled throughout the project.

The importance of the final project report cannot be overstated, as it will form the foundation of ongoing implementation efforts. Done properly, it will establish project validity and clearly demonstrate that the outcome is community-driven with balanced representation from across the project area.

In addition, it will serve as the end product/deliverable for the California Regional Blueprint Program, the source of grant funding for this project.

The Final Report should be viewed as an ongoing task throughout the entire project. All stakeholder and public participation will be comprehensively and meticulously documented, including meeting minutes, photographs, and preservation of all materials prepared for or generated as a result of meetings, focus groups, or outreach activities. At the earliest stage of the project, a basic outline of the report will be generated as a framework for generating content.

Objective: To preserve and perpetuate project methodology, participation, and outcomes in order to cement and legitimize the preferred vision. To

provide the supporting documentation necessary for local policy makers to advance the community vision through policy implementation. To complete the community participation feedback loop and celebrate their participation.

Deliverables:

- 1) Provide comprehensive documentation of all outreach activities throughout the project. At minimum, documentation shall include photographs of all public meetings and significant outreach activities, meticulous meeting minutes, and copies of all materials prepared for or resulting from the meeting. Minutes shall be provided electronically within 3 business days of the event. All other data collected shall be summarized and routinely reported at significant project milestones. Summary reports shall be written in a format appropriate for sections or chapters of the final report.
- 2) Administer post public outreach random telephone survey. Compare against baseline public opinion/measure of understanding and report findings.
- 3) Design of final project report, utilizing selected photos, news stories, quotes, presentation materials, public input, and so forth. Report size is anticipated to be from seventy-five to one-hundred 8.5 x 11 inch panels (i.e. one double-sided page equals two panels), in color and ready for production (Adobe InDesign format). A number of panels will be fold out maps.
- 4) Co-present final report at county board and three city councils

SCRTPA to Provide:

Final draft text content; modeling output graphics; distribution of final report; presentations to boards and councils.

Helpful hint: Quality of design work and content is a direct reflection of the project and will directly influence implementation of corresponding policy change. Consultant is encouraged to highlight experience and expertise in producing similar reports, including sample document(s), if available.

IV SERVICES TO BE PROVIDED BY THE SCRTPA

With the exception of those items specifically referenced above, the Consultant shall provide all necessary resources and services to execute the work scope described.

If the Consultant assumes that the SCRTPA will provide services other than those specifically indicated above, those assumptions should be clearly stated and highlighted in its proposal. It is the Consultant's responsibility to bring to the SCRTPA's attention any discrepancies, omissions, or within this RFP and obtain clarification/direction.

V SCHEDULE

It is anticipated that the formal contract will be awarded at the June 26, 2007 SCRTPA board meeting. Following a written notice-to-proceed, the Consultant's work shall begin within 7 days. All deliverables, including final project report, must be completed by November 2008.

Interested firms are encouraged to attend a pre-proposal conference. Attendance at pre-proposal conference is not required to submit a proposal.

Pre-Proposal Conference
Thursday, May 17, 2007
1:00pm to 3:00pm
Shasta County Public Works Conference Room
1855 Placer St
Redding, CA 96001

Additional significant dates and deadlines are as follows:

Release of RFP.....	5/2/07
Pre-Proposal Conference.....	5/17/07
All Questions Due to RTPA.....	5/21/07
SCRTPA Response to All Questions	5/23/07
RFP Response Submission Due Date (by 5:00 PM)	6/6/07
Interviews of top ranking firm(s) (at SCRTPA's discretion)	TBD
Notification of intent to award	6/11/07
Formal award and contract execution.....	6/26/07

A notice to proceed issued by the SCRTPA will specify the work to be completed, a schedule for work completion, the basis for payment, and the limits of compensation. The Consultant shall not begin work nor incur any costs associated with any task identified herein without an explicit written notice to proceed for each task specified.

VI COMPENSATION

The SCRTPA will negotiate a contract with the selected Consultant based on the following assumptions and conditions:

- For all services rendered in association with Tasks 1 through 6, including all labor, equipment, materials, and expenses, the Consultant shall be

compensated on a time and expenses basis by task for work completed.

- Proposals shall include a not to exceed amount as appropriate to complete all tasks included herein. This amount shall include a minimum 10% cost contingency for additional or expanded work tasks as identified and authorized in writing by the SCRTPA.
- SCRTPA reserves the right to authorize scope of work in pieces in order to control project budget and maintain quality control over the duration of the project.

VII PROPOSAL REQUIREMENTS

Submittals

Interested firms are invited to submit four (4) copies of their proposals to the following address:

**Shasta County RTPA
Attn: Daniel Wayne, Senior Transportation Planner
1855 Placer St.
Redding, CA 96001**

Faxed copies will not be accepted.

To be considered, proposals must be received no later than 5:00 pm on Wednesday, June 6, 2007. Clearly mark the submittal as follows:

TECHNICAL PROPOSAL: SHASTA *FORWARD*>> PUBLIC INVOLVEMENT SERVICES

Contents of the Technical Proposal

At a minimum, your technical proposals should contain the information outlined herein. Additional information that the proposer deems relevant to the selection process may be included; however, concise and focused submittals are strongly encouraged. By submitting a proposal, and unless otherwise stated, it is understood that the Consultant has reviewed the relevant information, and that based on that review, the Consultant has developed an informed understanding of the projected scope of work and has satisfied itself with the applicable conditions and requirements expressed in those documents.

- Firm Background – In two pages or less, provide a brief overview of the firm that will assume all contract responsibilities and identify all proposed subconsultants.
- Project Team – Provide an organizational chart that identifies the individuals

(including subconsultants, if applicable) assigned to and responsible for the key elements of the work scope and their relationship to the other elements. Indicate the number of hours each member has been budgeted and will be assigned to the project. In particular, identify the personnel specifically assigned to the following duties: data evaluation/reporting, and technical review. It is the SCRTPA's intent to have the proposed project team committed to this assignment as a specific contract provision (see Standard Agreement in Exhibit C).

- Individual Qualifications and Experience – Provide resumes for each key staff member. Only include resumes for staff who are specifically assigned and whose assignment accounts for at least five percent of the total allocated hours. Provide up to three examples of recent related projects completed (or ongoing) by the proposed project team. For each relevant project: indicate the firm's role and the staff members who were responsible for the cited project work; provide a brief description of the contract scope of work; state the contract amount and completion date; and include the name, title and phone number of a client reference.
- Statement of Understanding and Scope of Work – Proposals should provide a statement of your understanding of the project by highlighting the major project steps and outlining your approach toward addressing these steps. Any recommendations regarding improvements to the public involvement process to more effectively meet the SCRTPA's stated objectives should be emphasized in your proposal, and would be a clear means of demonstrating your understanding of the project requirements.
- Schedule – Proposals should present a project schedule showing milestones, deliverable dates, and the duration of each task where it is known. All deliverables, including final project report, must be provided no later than November, 2008. **Please include a definitive statement in regard to the timeliness and completeness of all deliverables.

Contents of the Fee Proposal

Proposers are required to provide a separate fee proposal that includes all fees and expenses according to the scope of work, term, and compensation conditions cited above.

Sufficient information should be provided to justify the proposed fee and to serve as a basis for negotiating a contract. In this regard, the fee proposal should identify personnel, estimated number of hours, and rate; type of equipment, hours, and rate; and any outside costs for each identified work element.

The proposed fee will be used to establish the not-to-exceed contract limit that will be maintained in accordance with the conditions specified herein. The not-to-exceed amount shall include a 10% contingency for additional or expanded works tasks as identified and authorized in writing by the SCRTPA. Except in the unusual situation wherein the Consultant encounters circumstances that could not be reasonably anticipated, the SCRTPA will not authorize payment beyond this amount.

VIII SELECTION CRITERIA AND PROCESS

Consideration of proposals and subsequent award will be based on, but not limited to, the following, equally weighted criteria:

- Understanding of the Required Services – Responsiveness to this Request for Proposals is a primary consideration, including clarity and efficacy of the approach to achieve the cited objectives. Proposals that provide a focused and concise response to the SCRTPA's needs and that demonstrate an understanding of community and transportation planning principles will be considered favorably.
- Experience and Qualifications – Demonstrated capabilities and technical expertise of the project team in the specialized areas of work. Demonstrated ability to provide necessary services in this region.
- Level of Effort – Reasonableness of fee proposal relative to the level of effort associated with the proposed work scope. Depending on the results of the selection panel review, a shortlist of qualified and responsive consulting firms may be requested to participate in an interview. No interviews will be held if the results of the selection panel review are unambiguous.
- Performance Commitment – Please include a definitive statement and specific project management strategies employed to guarantee the timeliness and completeness of all deliverables.

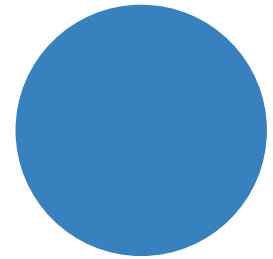
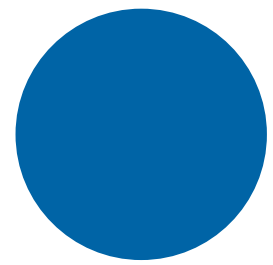
IX CONTRACT CONDITIONS

The selected consultant will be required to sign a standard SCRTPA contract and maintain required insurance coverage. Professional liability insurance will be required in the minimum amount of \$ 1,000,000. A copy of the SCRTPA's standard agreement for professional services is attached as Exhibit C. Unless indicated otherwise, submission of a proposal indicates that the proposer accepts the terms of the standard agreement.

ATTACHMENT B: “2007 RATE SCHEDULE”

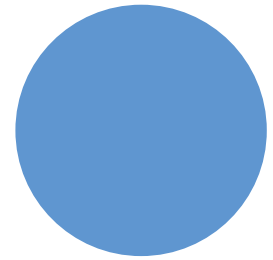
Labor Expenses			TASK A		TASK 1		TASK 2		TASK 3		TASK 4		TASK 5		TASK 6		Grand Total	
Title	Name	Rate	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost
PROJECT MANAGER	Jim Moore	\$76.00	16	\$1,216.00	36	\$2,736.00	84	\$6,384.00	84	\$6,384.00	56	\$4,256.00	68	\$5,168.00	52	\$3,952.00	396	\$30,096.00
SENIOR ASSOCIATE	Ryan Barton	\$58.00	0	\$0.00	24	\$1,392.00	44	\$2,552.00	60	\$3,480.00	48	\$2,784.00	60	\$3,480.00	42	\$2,436.00	278	\$16,124.00
SENIOR ASSOCIATE	Tim Whyte	\$54.00	0	\$0.00	16	\$864.00	36	\$1,944.00	32	\$1,728.00	40	\$2,160.00	36	\$1,944.00	36	\$1,944.00	196	\$10,594.00
SURVEY COORDINATOR	David Beebe	\$26.00	0	\$0.00	0	\$0.00	48	\$1,248.00	40	\$1,040.00	8	\$208.00	18	\$416.00	42	\$1,092.00	154	\$4,004.00
ACCOUNT MANAGER	Ashlee McNulty	\$36.50	0	\$0.00	20	\$730.00	36	\$1,314.00	44	\$1,605.00	28	\$1,022.00	32	\$1,168.00	36	\$1,314.00	196	\$7,154.00
Subtotal, Direct Labor			16	\$1,216.00	96	\$5,722.00	248	\$13,442.00	260	\$14,238.00	180	\$10,430.00	212	\$12,176.00	208	\$10,738.00	1220	\$67,962.00
Burden and Overhead		48%		\$583.68		\$2,746.56		\$6,452.16		\$6,834.24		\$5,006.40		\$5,844.48		\$5,154.24		\$32,621.76
Total Labor				\$1,799.68		\$8,468.56		\$19,894.16		\$21,072.24		\$15,436.40		\$18,020.48		\$15,892.24		\$100,583.76
Direct Costs																		
Travel/per diem				\$450.00		\$750.00		\$750.00		\$750.00		\$750.00		\$750.00		\$750.00		\$4,950.00
Surveys				\$0.00		\$0.00		\$8,500.00		\$0.00		\$0.00		\$0.00		\$8,500.00		\$17,000.00
Production				\$0.00		\$2,000.00		\$650.00		\$650.00		\$650.00		\$650.00		\$1,250.00		\$5,850.00
Total Direct Costs				\$450.00		\$2,750.00		\$9,900.00		\$1,400.00		\$1,400.00		\$1,400.00		\$10,500.00		\$27,800.00
TOTAL COST				\$2,249.68		\$11,218.56		\$29,794.16		\$22,472.24		\$16,836.40		\$19,420.48		\$26,392.24		\$128,383.76

ATTACHMENT C: "CONSULTANT PROPOSAL"



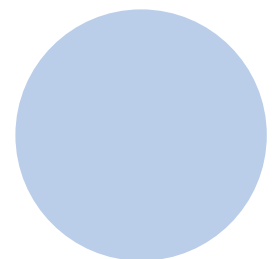
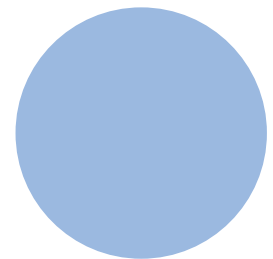
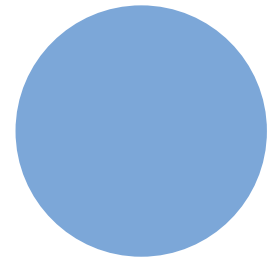
proposal

shasta county regional transportation
planning agency



shastaFORWARD public involvement series

6 june 2007



FIRM BACKGROUND

Founded in 1991 by Jim Moore and incorporated in California, Moore & Associates is a full-service public transportation consultancy. Throughout the course of our history, we have provided a broad range of outreach, marketing, planning, auditing, and general management services for nearly 100 public transportation organizations throughout California and the West.



We believe our experience in engaging diverse audiences and creating strategies tailored to the needs and values of an individual community makes us well-suited to help the Shasta County Regional Transportation Planning Agency achieve the public involvement goals outlined in its ShastaFORWARD>> blueprint.

Moore & Associates has created and implemented successful public involvement strategies for some of California's fastest growing and most successful public transportation organizations. Our clients include the Los Angeles County Metropolitan Transportation Authority, Redding Area Bus Authority, Marin County Transit District, City of Santa Clarita, City of Visalia, Victor Valley Transit Authority, National Park Service, Central Contra Costa Transportation Authority, Thousand Oaks Transit, and Los Angeles World Airports.

The Moore & Associates' team offers a broad set of complementary skills and experience, and our strategies have been shaped by an extensive knowledge of public transportation and planning. This gives us a valuable edge over other firms that merely provide generic and non-specific marketing, public relations, and advertising services.

Further, Moore & Associates is a "brick and mortar" company with full-time, committed employees, rather than a loose collection of unrelated individuals. Our firm is financially stable and has operated continuously since 1991. There are no financial conditions or conflicts of interest that would impede our ability to successfully complete the proposed engagement.

Why Moore & Associates?

We know how to engage communities in dialogue — not only to listen, but to develop viable, sound action plans based on public input. The programs, events, and services we have created for our clients succeed because they are based on the individual priorities of each community rather than a one-size-fits-all template. Moore & Associates has helped numerous public transportation organizations grow ridership, reach new users, and increase community support for transportation-related initiatives. The SCRTPA's goals and our experience are a perfect match.

Our team members have a firm understanding of the issues and challenges that face the SCRTPA and other RTPAs as they plan for the future and strive to create balanced communities that offer a high quality of life. In addition to the governmental, political, and financial challenges that accompany such an effort, we are familiar with citizens' attitudes toward public transportation and other planning issues. We utilize proven practices to affect and influence those attitudes in a positive manner.

The needs of the ShastaFORWARD>> public outreach effort include community meetings, open houses, and targeted events for groups that otherwise traditionally go unheard. The project also calls for the creation of effective, creative, professional planning tools and promotional materials, both in print and electronically. The Moore & Associates' team possesses all of the skills and experience needed to meet and exceed these expectations.

We are confident that our abilities and experience will help ShastaFORWARD>> generate the interactive community involvement that the SCRTPA seeks, ultimately creating a regional growth strategy that will have broad-based community support. We look forward to having the opportunity to support the SCRTPA in such a rewarding project.

PROJECT TEAM

Project Manager

We believe a tremendous opportunity exists to create a sense of community “ownership” in the Shasta County regional growth planning process. Accordingly, we propose Jim Moore, our company’s founder and managing partner, as the project manager. We believe his experience, expertise, and personal attention to the project will ensure its success.

Mr. Moore possesses nearly 30 years of marketing and transportation planning experience gained in both the public and private sectors, including managing a number of transportation development projects. As project manager, Jim will be the primary point-of-contact between the Shasta County Regional Transportation Agency and our firm. He will be responsible for coordinating work assignments within our project team and ensuring all project materials, events, and services are of the highest quality.

The team members proposed for this engagement have worked together successfully on a number of projects of similar scope, achieving remarkable increases in community awareness, along with high levels of customer satisfaction.

Project Strategy

Moore & Associates proposes to employ a project management strategy known as Program Evaluation and Review Technique (PERT). This methodology allows each Moore & Associates project manager to implement specific project control strategies to ensure a project remains on-schedule and achieves its objectives. Project strategies for critical tasks may include schedule compression (i.e., start a subsequent task before the completion of a prerequisite task, such as beginning coding and entering data before all surveys are completed), reassignment of resources (i.e., assign non-critical task resources to critical tasks), and increase in resources (i.e., reallocate resources assigned from other projects to supplement staff assignments).

Our successful employment of the PERT management strategy has allowed us to offer each Moore & Associates’ client an unconditional guarantee regarding project completion.

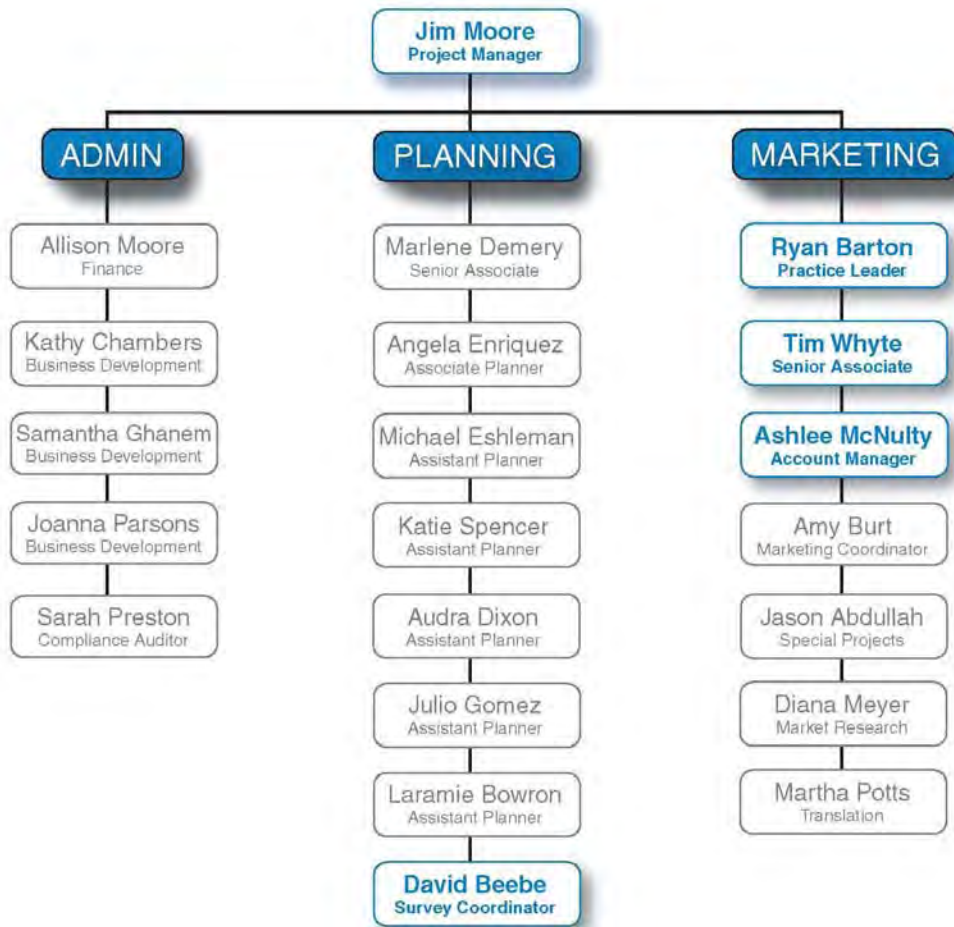
Further, our project team utilizes a proactive Quality Control strategy which facilitates the provision of top-quality deliverables throughout the course of an engagement. The SCRTPA has expressed a desire to ensure all materials related to the ShastaFORWARD>> process are of the highest quality in both design and substance. We couldn't agree more, and our team stands ready to deliver project materials — both print and electronic — as well as event coordination services that not only meet the SCRTPA's expectations, but exceed them.

Project Roles

Our project team has been carefully selected based on their individual strengths and complementary skills. They bring proven experience in planning, community outreach, consensus building, marketing, website development, and market research. The following chart outlines the role each team member will play in the proposed engagement, as well as the number of hours budgeted for the project.

Name	Role	Hours
Jim Moore	Project manager, community outreach, event facilitation, consensus building, data evaluation, reporting	396
Ryan Barton	Technical review, collateral/presentation development, event facilitation, website development, reporting	278
Tim Whyte	Website development, collateral/presentation development	196
David Beebe	Survey development, data evaluation, reporting	154
Ashlee McNulty	Collateral/presentation development	196

ORGANIZATIONAL CHART



INDIVIDUAL QUALIFICATIONS

The Moore & Associates’ team features seasoned professionals with significant experience of direct benefit to the SCRTPA. Further, this team reflects a true public transportation marketing team. Each member possesses a depth of experience gained from collaboration on similar assignments, thereby allowing the team to function as a cohesive unit while drawing upon individual member expertise. Each person contributes a somewhat different perspective – understanding of transportation-related planning, knowledge of Shasta County, effective graphic design standards, consensus building experience, community outreach facilitation, and general creative expertise.

[Jim Moore](#), our proposed project manager, is a transportation professional with nearly 30 years of high-profile experience including public transportation marketing, project management, service evaluation, and service planning. His industry knowledge and ability to think “outside the box” have helped develop Moore & Associates into the industry-leading firm it is today. Mr. Moore has developed and helped implement mobility strategies for numerous communities throughout California, Arizona, Utah, Texas, and beyond.

[Ryan Barton](#) is a marketing, advertising, and public relations professional with a Bachelor of Science degree in business and economics, with an emphasis in marketing. A strongly creative and valuable team member, Mr. Barton has extensive experience designing and implementing strategic advertising and marketing campaigns across the private, public, and non-profit sectors. He has played a key role in the implementation of marketing strategies for many of our highest-growth clients, including Fresno Area Express, The County Connection, Thousand Oaks Transit, City of Lompoc Transit, Mountain Line Transit, Stockton Metropolitan Airport, and Visalia City Coach. He maintains a strong foundation in the fundamentals of marketing and advertising and combines this with a pragmatic and experienced view of the transportation industry. He will work with SCRTPA staff on a day-to-day basis to ensure all creative aspects of the project are effectively implemented, reflect quality, and achieve objectives.

[Tim Whyte](#) is a skilled writer, editor, manager, and journalist who possesses 18 years’ experience in the newspaper business. During that time, he earned more than three dozen state, regional, and national awards for writing, editing, design, and commentary. He was editor of *The Signal* newspaper from 1994 until 2004, when he was named the paper’s general manager, supervising all facets of the business. While working as a writer and editor in one of California’s fastest-

growing communities, he developed familiarity and expertise on a broad range of issues, including growth, education, and government. He holds a degree in journalism from College of the Canyons and a bachelor's degree in political science from California State University, Northridge. He has also served since 1997 as a part-time faculty member at CSUN.

[David Beebe](#), our firm's Survey Coordinator, holds a Bachelor of Science degree in Business Administration, Concentration in Marketing. Mr. Beebe has coordinated performance evaluations and survey administration for the Tulare County Association of Governments, Tulare County, Glenn County Transportation Commission, Redding Area Bus Authority, City of Burbank, San Benito Council of Governments, and the City of Petaluma. He has developed survey instruments and has performed survey analysis using both SPSS and XLMiner, comparative statistical analysis software packages. His experience includes the development of reports utilizing hierarchical and k-means clustering data reduction methods for analysis of consumer trends and purchase behavior.

[Ashlee McNulty](#) has extensive design experience as well as fine art and graphic design training from California State University, Northridge and Art Center College of Design. She holds a Bachelor of Arts degree in Fine Art with a Minor in Marketing and is currently in pursuit of her Master's in Business Administration. Ms. McNulty's professional experience includes designing numerous print advertisements, direct mail pieces, newsletters, system brochures, and other collateral for clients including Mountain Line Transit, Visalia City Coach, and Victor Valley Transit Authority, Burbank Bus, Stockton Metropolitan Airport, and the County Connection. She will bring both creative perspective and business insight to this project.

[We offer the SCRTPA four guarantees.](#) The team identified herein will perform all work outlined within the proposed Scope of Services, all key personnel will be available to the extent proposed for the duration of the project, no key team member will be removed or replaced without written consent of the SCRTPA, and the critical milestones established during the project initiation meeting will be maintained. We also warrant that we have the ability to perform the tasks outlined in the Scope of Services given our current client assignments.

A detailed resume for each team member follows.

JIM MOORE

PROJECT ROLE

Project manager, community outreach, event facilitation, consensus building, data evaluation, reporting

EDUCATION

Bachelor of Science, Political Science, California State University, Fullerton

PROFESSIONAL INVOLVEMENT

Arizona Transit Association

California Association for Coordinated Transportation

California Transit Association

Community Transportation Association of America

PUBLISHED ARTICLES

Metro Magazine, Bus World, Passenger Transport, Transit California, Western Transit

Project Management

Lead consultant for the development of an innovative partnership between the City of Visalia and the National Park Service. Resulted in implementation of both external and internal shuttle services. Responsible for meeting facilitation between project partners, community stakeholders, and the Visalia community.

Primary author of the City of Burbank's Transit Efficiency Study. Evaluated the operation and management of all City-operated transportation services and established baseline performance data and service criteria for City's fixed-route, demand-response, and youth transit programs. Advanced recommendations for consolidating management functions within the City optimizing resources. Implementation of our recommendations resulted in reduced operating costs, increased ridership, and a more effective use of capital resources. Included facilitation of numerous community forums, as well as presentations to both appointed and elected stakeholders.

Project manager and co-author of the City of Visalia's Short Range Transit Plan. Resulted in reversal of multi-year ridership erosion, enhanced contractor performance, and increased community support for transit-related initiatives. Included facilitation of numerous community forums as well as presentations to both elected and appointed officials.

Project manager and co-author of Short Range Transit Plans for Burbank, Calaveras County, Santa Maria, Paso Robles, Yuma, Humboldt County, Petaluma, Tulare County, Stanislaus County, Logan (Utah), and Napa County.

Project Manager, Caltrans-funded Environmental Justice project. Monument Corridor Targeted (Hispanic) Community Outreach, Central Contra Costa Transit Authority.

Lead negotiator, inter-community transit service expansion. Cities of Visalia, Exeter, Farmersville, and the County of Tulare. Including cost-sharing methodology.

Consultant, Caltrans-funded state-wide alternative transportation enhancement project targeting persons employed within the agricultural sector. Parallel support of five-county rideshare effort fielding more than 250 vans.

PROJECT ROLE

Technical review,
collateral/presentation
development, event facilitation,
website development, reporting

EDUCATION

Bachelor of Science, Business and
Economics, Emphasis in
Marketing, California State
University, Northridge

Adobe Illustrator CS3, Photoshop,
InDesign, Quark, HTML, Statistical
Package for the Social Sciences
(SPSS)

**PROFESSIONAL
INVOLVEMENT**

American Marketing Association

PUBLISHED ARTICLES

Metro Magazine

RYAN BARTON**Advertising/Marketing**

Designed and implemented holiday multimedia campaign for Thousand Oaks Transit. Resulted in highest all-time ridership.

Designed print advertisements for Visalia City Coach, Mountain Line Transit, and Vacaville City Coach, Stockton Metropolitan Airport, Burbank Bus, Victor Valley Transit Authority, and Santa Ynez Valley Transit.

Designed, launched, and maintained web sites for Victor Valley Transit Authority, San Benito County Express, Sequoia Shuttle, and Visalia Municipal Airport, with a consistent look and feel with other collateral materials.

Branding

Designed and developed vehicle branding concepts for Manteca Transit, Marin Transit, Petaluma Transit, Sequoia Shuttle, and Wichita Falls Transit, TX.

Collateral Development

Created and designed numerous collateral pieces, including newsletters and direct mail pieces. Resulted in increased awareness among community organizations, employers, and travel agents.

Designed wide-array of collateral for Marin County Transit District, Vacaville City Coach, City of Lompoc Transit, Thousand Oaks Transit, and Visalia City Coach. Resulted in a compact resource for riders and a consistent visual identity for the service.

Event Planning

Planned and executed a successful 25th Anniversary Celebration for Visalia City Coach. Resulted in increased awareness and enhanced public perception of service and vehicles.

Coordinated Stockton Metropolitan Airport's participation in the inaugural flight of Allegiant Airlines. Resulted in increased awareness and enhanced relationships with travel agents, air service providers, and the general public.

Market Research

Developed, conducted, and analyzed community and transit customer surveys for Fresno Area Express, Stanislaus Regional Transit, Logan Transit District/Cache Valley Transit District (Utah), and Coconino County/Mountain Line (Arizona).

Public Relations

Provided copywriting for media releases and feature articles for Mountain Line Transit, Burbank Local Transit, Visalia City Coach, Santa Ynez Valley Transit, and City of Lompoc Transit resulting in extensive earned media coverage within industry and general audience print media.

TIM WHYTE

PROJECT ROLE

Website development, collateral/
presentation development

EDUCATION

Bachelor of Science, Political
Science, California State
University, Northridge

Associate of Arts, Journalism,
College of the Canyons

SOFTWARE

Photoshop, InDesign, Quark,
Acrobat, iWeb

PROFESSIONAL INVOLVEMENT

Santa Clarita Valley Press Club

Project-Specific Experience

Developed strong body of knowledge during 18-year community newspaper career covering and writing about development, growth, land use, water, and other related issues in one of the fastest-growing communities in Southern California.

Media Management

Led *The Signal* newspaper as Editor and General Manager over a span of more than a dozen years. As General Manager (2004-2007), supervised a staff of approximately 100, taking responsibility for all departments including editorial, advertising, accounting, creative services, prepress, press, and circulation. As Editor (1994-2004), shaped and led the newspaper's coverage and editorial policy on a variety of issues, including transportation, growth, education, government franchises, public information, and open government. Ensured that *The Signal* was in touch with and reflected the values of its community, a suburb north of Los Angeles that consistently ranks among the state's most desirable and rapidly growing areas.

Awards

Eighteen-year community journalism career culminated in *The Signal* being named the National Newspaper Association's top community newspaper in 2006 (General Excellence). Winner of more than three dozen individual awards for writing, editing, commentary, and design in competitions held by The Associated Press, California Newspaper Publishers Association, National Newspaper Association, and Society of Professional Journalists.

Cal State Northridge

Has served since 1998 as a part-time faculty member teaching editing in the Journalism Department at California State University, Northridge.

Community Involvement

Co-founder and President of Santa Clarita Valley Press Club, which awards approximately \$40,000 in scholarships annually to students pursuing careers related to the First Amendment and the free dissemination of information. In this role, serves as the primary planner and coordinator for annual "Newsmakers of the Year" fund-raising event, attended by approximately 400 people comprising a "who's who" of the community.

Board member of Santa Clarita Valley Food Pantry, whose mission is to ensure that no child in the community will go to bed hungry.

PROJECT ROLE

Survey development, data evaluation, reporting

EDUCATION

Bachelor of Science, Business Administration, Concentration in Marketing, Charles H. Lundquist College of Business, University of Oregon

DAVID BEEBE**Data Analysis/Market Research and Surveys**

Currently conducting performance and boarding and alighting analysis for the City of Vacaville and Tulare and Glenn Counties.

Currently preparing on-board customer survey analysis for the City of Vacaville.

Coordinated survey administration, performance evaluations, and boarding and alighting assessments for Tulare County and City of Petaluma. Provided training to and field oversight of survey personnel.

Developed survey instruments and sampling plans supporting firm's Marketing and Planning practices.

Created and maintained SPSS databases to facilitate data collection and analysis.

Conducted performance evaluations for the Glendale Beeline and Burbank Bus. Assessments included on-time adherence, boarding and alighting, and vehicle conditions.

Prepared ride check and call center monthly analysis reports for the City of Glendale.

Aided with the creation and coordination of surveys directed towards San Benito County residents. Conducted in-depth analysis of resulting data, identifying rider travel patterns and assessing network gaps, use barriers, and satisfaction levels.

Assisted with the analysis of on-board origin-destination, customer satisfaction, and transit user surveys for counties of Glenn, Madera, and Tulare and cities of Petaluma and Wichita Falls.

Integrated Marketing

Participated in public outreach events to spread awareness of the Burbank Bus services, benefits, and informational access channels.

ASHLEE M^CNULTY

PROJECT ROLE

Collateral/presentation development

EDUCATION

Art Center College of Design

Bachelor of Arts, Fine Art, Minor Marketing, California State University, Northridge

Enrolled, MBA Program, California State University, Northridge

Adobe Illustrator CS3, Photoshop, InDesign, Quark

PROFESSIONAL INVOLVEMENT

American Marketing Association

Advertising/Marketing

Designed print advertisements for Mountain Line Transit, Visalia City Coach, Victor Valley Transit Authority, Thousand Oaks Transit, Santa Ynez Valley Transit, and Marin County Transit District.

Assisted in the production and scheduling of radio buys for Mountain Line Transit, Visalia City Coach, and Thousand Oaks Transit.

Collateral Development

Designed collateral pieces, including brochures and system maps, for Mountain Line Transit, Visalia City Coach, Burbank Bus, City of Lompoc Transit, Wichita Falls Transit System, and Thousand Oaks Transit.

Assisted in the creation and distribution of direct mail pieces for Stockton Metropolitan Airport, Mountain Line Transit, Santa Ynez Valley Transit, Victor Valley Transit Authority, and City of Lompoc Transit.

Responsible for development of quarterly newsletters including layout designs, research, and copywriting for airports such as Stockton Metropolitan, Visalia Municipal, and Santa Clara County. Resulted in increased awareness amongst airport personnel, tenants, associated communities at-large.

Assisted in the development of transit advertising and information collateral including vehicle advertisements, car cards, and information posts for Burbank Bus, The County Connection, Sequoia Shuttle, and Thousand Oaks Transit.

Public Relations

Responsible for copywriting and distribution of media releases for numerous clients, including Mountain Line Transit, Santa Ynez Valley Transit, City of Lompoc Transit, and Visalia City Coach.

Played integral role in coordination of Visalia City Coach's *Dare to Spare* event, promoting alternative transportation and trial transit ridership. Primary responsibilities included collateral development and community outreach.

Community Outreach

Assisted in the execution of the County Connection's *Amigos de Viajar* travel training program. Specific responsibilities included development of bilingual collateral, participant recruitment, training coordination, and advertising placement. Resulted in increased and support from Spanish-speaking community and overall ridership gain for the service.

EXPERIENCE

CITY OF BURBANK - BURBANK BUS

Andrew Carrasco, City of Burbank Transportation Services Coordinator
275 E. Olive Ave, Burbank, CA 91510
818.238.5359

Moore & Associates has partnered with the City in the marketing and community outreach of its community-based transit service since 1994. In doing so, we have helped alter the face of transit in Burbank, realizing double-digit ridership growth annually and establishing the transit system as a vital element of the community.

In 1999, the California Transit Foundation presented the City with its [Tranny Award](#) for the design and construction of the City's Regional Intermodal Transportation Center. Moore & Associates played a key supporting role throughout this project, coordinating community and industry outreach, as well as a facility dedication ceremony.

Moore & Associates also designed and implemented a multimedia marketing strategy supporting the introduction of the City's zero-emission shuttle fleet, a community-wide direct mail campaign, five-year service growth strategy, and numerous earned media opportunities in both the industry and general press.

Our most recent project was the development of a trip planning component for the City's transit website. The partnership with Google was the first effort of its kind in California, and one of ten in the nation.

Following [20 percent](#) ridership growth in 2005, Burbank Bus realized [40 percent](#) ridership growth in 2006.

Key Staff: Jim Moore (project manager, outreach, planning)
 Ryan Barton (special event planning, collateral design, marketing)
 Ashlee McNulty (collateral design, marketing)
 David Beebe (performance evaluations/ride checks, public outreach)

Contract Value: No less than \$75,000 annually

CITY OF VISALIA – VISALIA CITY COACH

Monty Cox, City of Visalia Transit Manager
 425 E. Oak Ave., Visalia, CA 93291
 559.713.4100

Over the past five years, Moore & Associates has completed several important projects for the City of Visalia. The City retained Moore & Associates to conduct marketing campaigns for two new service offerings: extended evening and new Sunday service and the launch of its new intercity transit service. As a result of our efforts, overall VCC ridership experienced a 14 percent growth (FY2004/Q2), and the new intercity service carried more than 15,000 riders in its first four months.

In late 2004, Moore & Associates nominated Visalia City Coach for the California Transit Association's [Small Operators Transit Excellence Award](#). Based on our submission narrative, VCC won the coveted award – its first such recognition.

Subsequently, the City selected Moore & Associates to develop a strategic marketing plan (building upon our firm's successful reversal of VCC's two-year ridership decline), as well as the design and implementation of a service rebranding.

Most recently, we have worked with City staff to launch a new and fresh campaign targeting potential choice riders. The game show campaign is based on the APTA study which found transit to save households over \$6,000 annually.

As a result, the local transit system is seeing increased trial ridership from demographics not normally associated with public transit services.

In 2005, VCC [ridership increased 24 percent](#).

Key Staff: Jim Moore (project manager, outreach, planning)
 Ryan Barton (special event planning, collateral design, marketing)
 Ashlee McNulty (collateral design, marketing)
 David Beebe (performance evaluations/ride checks, public outreach)

Contract Value: No less than \$125,000 annually

CITY OF GLENDALE – GLENDALE BEELINE

Rebecca Granite-Johnson, City of Glendale Public Works Division
 633 E. Broadway, Room 300, Glendale, CA 91206-4384
 818.548.3960

Moore & Associates has partnered with the City of Glendale since 2003. Our first assignment was the development and implementation of a strategic 24-month marketing plan. Our plan was holistic in its approach, including advertising, promotion, and public relations components. As a result, the City realized its greatest ridership growth in many years.

In Summer 2003, we assisted the City in the implementation and promotion of the NextBus “real time” customer information system. Our role included all event planning, media relations, and collateral development including promotional brochures and interactive displays demonstrating the NextBus software. As a result, the City realized extensive media coverage in both local and industry press. To offset the cost of the dedication event, Moore & Associates secured private sector sponsorships further leverage the City’s marketing dollars.

In Spring 2004, we were selected to coordinate all activities relating to the Beeline 20-year anniversary celebration.

Given the City’s desire to generate (and maintain) a high level of community and industry interest across a multi-month period, Moore & Associates developed a six-month multimedia campaign, capped by a public media event. Building upon the success of the NextBus unveiling, Moore & Associates was responsible for event planning, media relations, and all collateral development.

Additional marketing activities have included a student poster contest, community scavenger hunt, tours of Glendale aboard the Beeline, and the design of the 20-year logo.

Moore & Associates also provides the customer service call center for the Beeline, conducts performance evaluations (ride checks), and prepares monthly performance and call center analysis reports on behalf of the City.

Key Staff: Jim Moore (project manager, outreach, planning)
 Ryan Barton (special event planning, collateral design, marketing)
 Ashlee McNulty (collateral design, marketing)
 David Beebe (performance evaluations/ride checks, public outreach)

Contract Value: No less than \$40,000 annually

CCCTA – COUNTY CONNECTION

Cindy Dahlgren, Director of Administration
 2477 Arnold Industrial Way, Concord, CA 94520
 925.676.1976

As part of the Caltrans-funded Environmental Justice Grant, Moore & Associates conducted market research, film production, advertising, and community outreach within Concord's Monument Corridor. There was significant public perception that the Monument Corridor was underserved, and our market research and outreach was designed to evaluate the accuracy of this perception.

During all on-board surveys, team members were equipped with hand-held PDA devices that provided daily downloading of raw data, and later analysis via SPSS.

Moore & Associates held two community meetings aimed to acquire input from the Hispanic community regarding current transit service and marketing in their area.

In addition, Moore & Associates conducted pre-program onboard surveys in order to gain further insight from the community. Moore & Associates created the bilingual survey instrument, as well as provided and trained surveyors at each location. The firm was responsible for providing field supervision, data collection, data analysis, and survey reports.

In support of the *Amigos de Viajar* program, Moore & Associates scripted, directed, and produced a short film featuring some of the Monument Corridor's community members. The film, which was designed to instruct Spanish-speaking community members on how to utilize public transit, was distributed to over 50 locations throughout the community, featured on local television stations, and is an element of the *Amigos* training session.

Grassroots marketing efforts (community organizations, flyers, car cards, etc.) have since increased the transit system's role within the community and increased transit ridership within the Spanish-speaking community.

Since its launch, the program has been praised by community members, local media (*Contra Costa Times*), and industry publications (*Passenger Transport*) alike.

Key Staff: Jim Moore (project manager, community outreach)
 Ryan Barton (public outreach, collateral development, video production)
 Ashlee McNulty (collateral development)
 David Beebe (survey development)

Contract Value: \$95,000

KINGS COUNTY AREA PUBLIC TRANSIT AGENCY

Ron Hughes, Executive Director
 1400 West Lacey Boulevard, Hanford, CA 93230
 559.582.3211

In Fall 2006, the Kings County Area Public Transit Agency (KCAPTA) selected Moore & Associates to conduct a Vanpool and Rideshare Assessment for the Southern San Joaquin Valley.

The primary goal of the Southern San Joaquin Valley Rural Vanpool and Rideshare Assessment is to provide a comprehensive analysis of existing services (specifically, the Agricultural Industry Transportation Services, or AITS program) in order to facilitate expansion to other under-served areas. In doing so, Moore & Associates is committed to the development of a strategic and comprehensive plan to bring vanpool and rideshare programs to communities throughout the Southern San Joaquin Valley. A secondary goal of the project is to coordinate those (public and private) transportation services operating within the region, so as to enhance regional mobility.

Legislation passed in late 2006 resulted in Caltrans' Agricultural Worker Transportation Program (AWTP), which provides \$20 million in grants for the formation of agriculture-related vanpool programs. Extensive community and employer outreach efforts have resulted in increased interest in the program among public agencies, employers, and individual agricultural workers.

Moore & Associates organized and facilitated an hour-long webcast providing an overview of the AITS program and AWTP funding opportunities. The panel included Jim Moore, Ron Hughes, and Glenn Bailey of Caltrans. Participants included approximately sixty persons representing a broad spectrum of organizations (public agencies, advocacy groups, etc.). Follow-up contact was made with each participant, and promotional collateral distributed. We believe many of the webcast participants will be applicants for Caltrans' AWTP Round 2 funding.

Employing a database compiled by Moore & Associates, a series of targeted mailings were sent to Employee Transportation Coordinators (ETC) and Human Resources (HR) representatives at key employers throughout a five-county region. The packets included an introductory letter, bilingual AITS program brochure, and bilingual posters suitable for display at worksites. The program has a 95-percent cost recovery, and South Valley Rideshare telephone and website activity have increased significantly. Currently there are between 250 and 300 vans in service.

Key Staff: Jim Moore (project manager, employer outreach)
 Ryan Barton (public outreach, collateral development)
 Ashlee McNulty (collateral development)

Contract Value: \$200,000

THE SIGNAL (SANTA CLARITA)

Will Fleet, Publisher (Bradenton Herald)
 102 Manatee Avenue West, Bradenton, FL 34205-8810
 941.748.0411, ex. 7500

Mr. Whyte served as the editor of *The Signal* newspaper from 1994 until 2002, managing a staff of two dozen employees and a budget of approximately \$700,000 per year. As editor, he oversaw all facets of the Editorial Department's operations, including content, news coverage, editorial stances, and human resources issues within the department.

Key Staff: Tim Whyte (management, editing)

Budget: Approximately \$700,000 annually

SANTA CLARITA VALLEY PRESS CLUB

Eric Harnish, Board Member
 26455 Rockwell Canyon Road, Santa Clarita, CA 91355
 661.362.3429

In his role as president of the Santa Clarita Valley Press Club, Mr. Whyte is responsible for planning and coordinating the club's annual fundraiser, a "Newsmakers of the Year" dinner and auction, attended by approximately 400 people. The event raises the funds for the club's annual \$60,000 budget, which supports a local First Amendment scholarship program.

Key Staff: Tim Whyte (event planning, fundraising)

Budget: Approximately \$60,000 annually

GOLDEN STATE GATEWAY COALITION

Victor Lindenheim, Executive Director
 25709 Rye Canyon Road, Suite 105, Santa Clarita, CA 91355
 661.775.0455

Mr. Whyte was retained to redesign the coalition's website and communications systems, creating new online content and overseeing the establishment of a new database management system. He will also be responsible for producing a quarterly newsletter for the coalition's members and supporters on an ongoing basis.

Key Staff: Tim Whyte (website development, communications, newsletter development)

STATEMENT OF UNDERSTANDING

Simply stated, we are excited at the prospect of participating in an active, creative effort to not only engage the residents of Shasta County, but also to assist the Shasta County Regional Transportation Planning Agency attain its vision for a new regional growth plan promoting livable communities reflective of the values and priorities of its constituents.

We view ShastaFORWARD>> as a critical vehicle to facilitate informed decision-making by the community, based on an ongoing dialogue and interaction in which all participants embrace a sense of ownership toward the end goal. Throughout the project, the focus will be on community awareness, understanding, and engagement. We believe our team's experience regarding meeting facilitation, consensus development, and innovative community outreach positions us as a capable partner.

We envision a public outreach and engagement process that assists the SCRTPA in achieving the uniform goals of the California Regional Blueprint Planning program:

1. Foster a more efficient land-use pattern that (a) supports improved mobility and reduced dependency on single-occupant vehicle trips, (b) accommodates an adequate supply of housing for all incomes, (c) reduces impacts on valuable habitat, productive farmland, and air quality, (d) increases resource use efficiency, and (e) results in safe and vibrant neighborhoods.
2. Provide consumers more housing and transportation choices.
3. Improve California's economic competitiveness and quality of life.
4. Reduce costs and time needed to deliver transportation projects through informed early public and resource agency involvement.
5. Secure local government and community support, including that of under-represented groups, to achieve the resulting comprehensive vision through including innovative computer models and public involvement activities.
6. Establish a process for public and stakeholder engagement that can be replicated to build awareness of, and support for, critical infrastructure and housing needs.

The RTPA's regional blueprint efforts will include development of regional performance measures that can measure progress toward the region's own vision for future land use and transportation. Each region will also select several statewide performance measures to quantify progress toward statewide transportation system and housing goals.

ShastaFORWARD>> invites community members to help create a vision for the future growth of their region. The project includes all of Shasta County, emphasizing those areas where growth is most likely to occur. The process will also include discussions and evaluations of probable ongoing growth in the north-central portion of neighboring Tehama County, within the Interstate 5 corridor. While a boundary line separates the two counties for purposes of local government services, there are environmental, social, and economic connectivity factors that render such discussion relevant to the future of Shasta County. Urbanization is occurring on a regional basis, transcending governmental boundaries.

The state and federal governments are promoting the creation of "blueprints," such as the one be created with ShastaFORWARD>>, to promote more efficient planning of regional land use, economic development, and transportation issues. Enhanced public participation, such as the planned public involvement activities in this project, is also being encouraged to address quality of life concerns and to provide residents a heightened level of involvement in shaping their future.

Successful regional blueprint plans from around the country are available as models of "best practices." Two standouts include Central Florida's *myregion.org* program, which effectively integrates planning efforts throughout seven counties, and Envision Utah, which promotes smart growth within the Greater Wasatch Area of the state. Both efforts have identified regional growth goals through public workshops, community meetings, and focus groups, and each has an active internet presence. *Myregion.org* is currently entering its final stage, with final growth scenario selection taking place earlier this year and the final community summit scheduled for August 2007. Envision Utah has been the recipient of an Environmental Stewardship Award, and the planning model has been shared with over 50 regional planning organizations outside of Utah. Analysis of models such as these allows Moore & Associates to bring proven and effective public involvement methods to the Shasta County opportunity.

Blueprint studies are intended to provide a regional look into a variety of growth-related issues, looking forward two or three decades. Computer modeling and visualizations are employed to assist stakeholders in assessing potential scenarios and analyzing their relative merits. Performance indicators include public investment costs, economic benefit, impact on traffic congestion, and impact on air quality.

In short, ShastaFORWARD>> will help create a road map — both literally and figuratively — for the future of Shasta County. At Moore & Associates, we relish the role discussed in the RFP: To engage the public in the process, to inform and educate, and to help the community create and embrace a growth scenario and vision that is consistent with citizen values and will make Shasta County a desirable place to live well into the future.

SCOPE OF WORK

We believe our project team possesses the skills, knowledge, and expertise needed to realize the goals of ShastaFORWARD>>. We are excited about the prospect of assisting the Shasta County Regional Transportation Planning Agency both inform and engage the community in this important visioning process. As outlined in the RFP, we understand the role of the Public Involvement Services consultant would include the following:

Task A: Internal Kick-Off Meeting

Upon execution of the agreement between the Shasta County Regional Transportation Planning Agency (SCRPTA) and our firm, key personnel from our team of professionals — including project manager Jim Moore — will meet with SCRPTA’s project manager. The meeting will serve to establish protocol for communications, finalize the schedule for the project, and determine and prioritize the ensuing steps in the project process.

We will actively engage SCRTPA staff and key stakeholders throughout the project, from project initiation through completion. Frequent interaction including monthly on-site meetings will provide SCRTPA staff with a thorough understanding of the project’s progress and the status of all deliverables. Minutes of all meetings and outreach events will be provided to the SCRTPA within three business days. Written progress memos will be provided to the SCRTPA at the end of each monthly reporting period, and will include a description of work completed, upcoming tasks, and a discussion of current or anticipated challenges.

Given other engagements within the northern Sacramento valley, Moore & Associates’ staff is available with as little as 48 hours’ notice, and we are committed to fulfilling the on-site duties of this engagement.

Task 1: Setting the Stage

A kick-off event will be coordinated to help key stakeholders become both well-informed and supportive of the ShastaFORWARD>> project. This first step of the public involvement process is essential to the community-wide outreach and consensus-building efforts to come. Without the support of elected officials, policymakers, community leaders, and local business

leaders, ShastaFORWARD>> lacks momentum. Involving local leaders gives the project added credibility, a heightened sense of importance, and greater visibility.

Prior to the event, we will design an eye-catching and original invitation to be distributed on behalf of the SCRTPA. While we are amenable to abiding by the tasks as described in the RFP, we propose to conduct the ShastaFORWARD>> logo design and project branding activity of Task 2 concurrent with Task 1. This will allow all collateral produced in Task 1, including invitations and media kits, to be immediately identifiable as project components.

Before designing any media kits, we will provide a matrix outlining all media outlets within the project area. For each outlet, our matrix will include individual contact information, geographic coverage area, audience demographics, and a market share summary. As a result of work performed for the Redding Area Bus Authority, we conducted a comprehensive inventory of all media opportunities present within Shasta County. Further, given the prevalence of group ownership, Moore & Associates has ongoing relationships with a number of those radio/television station groups present within Redding. Being able to update and maintain our existing database, rather than having to start from scratch, allows us to devote more time to other elements of this task, such as media kit development and, if desired, logo design.

A third element of this task is the preparation of media kits. As a primary source of official information regarding the ShastaFORWARD>> project, the materials must be informative as well as attention-grabbing. As a dedicated marketing firm with professional graphic designers employed in-house, we are confident of our abilities to produce an original out-of-the-box piece demanding attention.

Media kits may include, but are not limited to, press releases, contact information for public relations representatives, educational graphs and charts, brochures, photographs, responses to frequently asked questions (FAQ), and business cards. Those participating in the kick-off event will have an opportunity to preview the kits before they are released to the media, ensuring that the information released is up-to-the-minute and accurate. Upon SCRTPA's final approval, Moore & Associates will produce and distribute the media kits to all media outlets as previously identified.

Our team members' combined experience will prove invaluable for activities such as the ShastaFORWARD>> kick-off event. Our marketing team has a great deal of experience in producing events designed to elevate awareness and brand identity, as well as to launch new products and services. Most recently, our firm assisted the City of Visalia with its launch of the Sequoia Shuttle, a partnership with the National Park Service providing mobility options to, from, and within Sequoia National Park. A two-month campaign featuring traditional and grassroots marketing activities coupled with the development of an interactive website was developed to celebrate the system's launch, with the media even serving as the pinnacle of the campaign. Moore & Associates was responsible for all media relations in support of the event. As a result, the event was highly attended and received worldwide media coverage including ABC and Fox television, Associated Press (AP), *Los Angeles Times*, *San Francisco Chronicle*, *Fresno Bee*, *Visalia Times-Delta*, and on-line forums and message boards frequented by the backpacking community. In print medium alone, the event's media coverage reached an audience of nearly 3 million.

The ShastaFORWARD>> event plays two important roles. First, it will function as an introduction to attendees of the vision, activities, and participants of ShastaFORWARD>>. Second, SCRTPA staff will gain valuable preliminary information about issues of importance to the greater Shasta County community. Special guests will address community feedback, "best practices," and scenario planning. The session will initiate the use of the Audience Response System (ARS), or "clicker" technology, to obtain information about event participants, guide discussions, and promote consensus-building.

Following the kick-off event, our project manager will consult with SCRTPA staff to evaluate the event. Input regarding elements that were particularly successful as well as those that were not will be noted so as to make future outreach events optimally effective.

Moore & Associates will document the event through photographs, a record of discussion and ARS results, and a comprehensive list of program participants. A summary of the event will be provided to SCRTPA's project manager within three business days. Comprehensive documentation of the kick-off event will also be included in our final report at the conclusion of the project.

Deliverables: Meeting invitations, media outlet matrix, media information kits, kick-off event summary report.

Task 2: Community Awareness, Education & Engagement

At Moore & Associates, we pride ourselves in creating marketing programs that achieve results and raise awareness. Consequently, we see the development of a Community Awareness, Education & Engagement (CAE&E) Plan for ShastaFORWARD>> as a tremendous opportunity. Employing a variety of formats, the CAE&E Plan will seek to capture the community's attention with bold statements, eye-catching presentations, and captivating discussions. From an interactive website to innovative newsletters, we will appeal to the residents of Shasta County for their attendance at and participation in the various open houses, community presentations, telephone survey, and town hall events specified by the RFP.

The CAE&E Plan is to be structured roughly the same as this Scope of Work and will guide each remaining task. The first element of the Plan is pre-project outreach such as that outlined in Task 1. The second consists of activities designed to make the community aware of the project, captivate their interest, and elicit their participation. The third element is an assessment of community values, such as will be accomplished by a telephone survey and public meetings. Fourth is a prioritization of those growth principles collected through public participation activities. The fifth element serves to prepare the public for voting on a preferred scenario by presenting each growth scenario for evaluation. The final element of the CAE&E Plan is a call-to-action that will result in a preferred growth scenario arising from the participation of well-informed voters.

Our CAE&E Plan will seek to fulfill the objectives outlined above and capture the public's attention through a variety of interactive formats. The first element of public outreach in this task will consist of a community telephone survey. This random survey of Shasta County residents will provide a baseline for evaluating community understanding and public opinion regarding ShastaFORWARD>>. Because we employ a full-time survey coordinator, we are able to perform all survey activities in-house. With guidance from SCRTPA's project manager, we will develop an appropriate questionnaire, establish sample size and desired confidence levels, administer the survey, process the raw data using Statistical Package for the Social

Sciences (SPSS), and provide easy-to-understand and relevant analysis of the results. A summary report will be provided to the SCRTPA for review and included in our final report.

Project Identity and Logo

An important aspect of this task is the creation of a “brand” identity for the project. Having an identifiable logo and “look” will increase the visibility of the project because all materials will have a cohesive look. Moore & Associates will design a logo and all accompanying communication materials, establish design standards for printed and web-based collateral, and provide the SCRTPA with electronic copies of all files on CD.

At Moore & Associates, we understand the importance of project identity. As indicated previously, we feel that the image of ShastaFORWARD>> would be best served by conducting this activity concurrent with Task 1, so that the logo and project identity can be consistent from the very earliest public involvement activities. Therefore, we have enclosed five (5) sample design concepts. We encourage SCRTPA staff to review each concept and, if desired, advise us of specific elements found in each logo that staff may wish to visualize in a new concept.

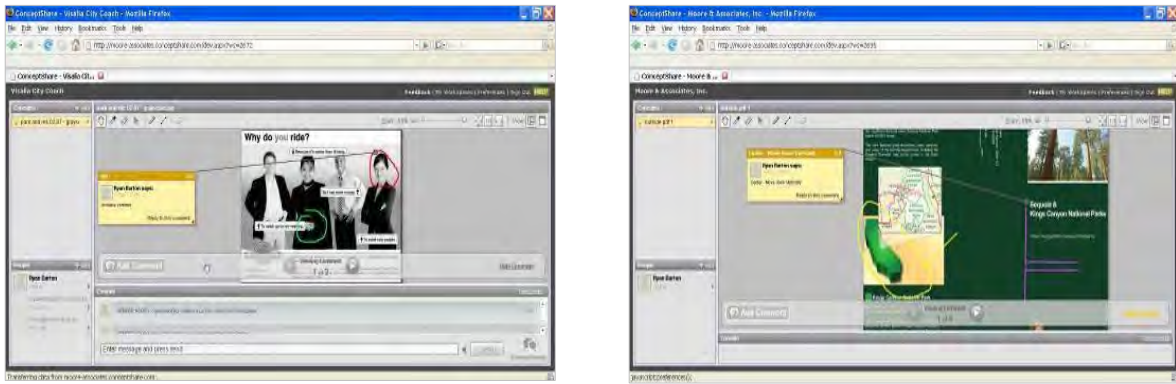
In no way are the following designs 1) the limit of our graphic capabilities nor 2) the project identity concepts in total.





Moore & Associates has assigned its most senior and seasoned team members to this project so that lessons learned and professional experiences are leveraged to the greatest extent.

Moore & Associates has strategically aligned itself with on-line web hosting partner, [ConceptShare](#). Throughout the creative process, we will proactively engage the SCRTPA through ConceptShare's client interface. For instance, when developing a newsletter, invitation, or other design, Moore & Associates will upload several creative concepts to the Moore & Associates-sponsored portion of the interface.



SCRTPA staff members will then be able to review said concepts to provide visual and written feedback regarding the designs. The opportunity to “draw” directly on the electronic artwork provides Moore & Associates with specific elements and changes that are easily communicated. Upon the upload of a revised design, an email notification is immediately dispatched advising of the availability of new artwork and inviting further creative feedback.

Media Buys

As we have done for numerous transportation organizations throughout the West, we will negotiate media purchases on behalf of the Shasta County Regional Transportation Planning Agency. Moore & Associates will determine the appropriate medium for each message, negotiate the buy, and design appropriate artwork. Our experience runs the gamut of traditional and non-traditional media, including print, broadcast, cinema, and outdoor advertising. Moore & Associates will determine the most cost-effective use of project monies, balancing circulation/target reach with cost. We will negotiate prices and media runs so as to provide the most value. *As a matter of policy, media buys coordinated by Moore & Associates are always non-commissionable, resulting in significant savings to our clients, and therefore allows for the most cost-effective use of project monies.*

Interactive Website

Moore & Associates will design, develop, and maintain an interactive website for the ShastaFORWARD>> project. The key to the Internet is maintaining accurate information; our ability to update the site in-house enables Moore & Associates to provide unparalleled response. Moore & Associates has the capability to update and create web designs utilizing the Flash applications, various contact management software, and FTP information. Our websites are

designed with SEO (search engine optimization) specifics in mind to enhance the site’s visibility. We will incorporate a hidden page counter into the site and monthly activity statistics will be provided to the SCRTPA, reporting page hits, duration of visit, connecting sites, search keyphrases, and history by month, day, and hour. The interactive website will include, at a minimum, a project home page, news and information postings, event calendar, document and resource library, and online survey capability. The site will be updated frequently, with all updates and changes subject to SCRTPA review and approval. As part of our website design, Moore & Associates also incorporate a user-friendly back end, which allows SCRTPA staff to make desired changes and updates without a detailed knowledge of HTML.

As evidence of our readiness to “hit the ground running,” we have secured project-specific domain names including shastaforward.com, shastaforward.net, and shastaforward.org. A beta version of the site will be made available for review and testing of features at least 10 calendar days before the site is scheduled to go “live.” The website will be fully functional and on-line prior to the commencement of public outreach activities.

Presence on the internet is essential in today’s marketplace, and the image and information provided strongly reflect on the agency. We have designed and maintained websites for public transportation entities such as San Benito County Express, Sequoia Shuttle, Victor Valley Transit Authority, Mountain Area Regional Transit Authority, Thousand Oaks Transit, and Visalia Municipal Airport. In support of San Benito County’s Short Range Transit Plan, Moore & Associates redesigned the County’s transit website. The new bilingual site (www.SanBenitoCountyExpress.org) provided all-inclusive Spanish-language content, trip planning options, news releases, rider alerts, and outside links. Due to our firm’s use of complementary search engine optimization programming, visits to the transit website increased more than [ten-fold](#) within two months of launch. Additional examples of our website development can be viewed from Moore & Associates’ online headquarters at moore-associates.net.

[Project newsletters](#)

Moore & Associates will design up to six project newsletters during the course of the proposed engagement. Featuring photographs from recent public events as well as informative copy, the newsletters will be full-color and sport the ShastaFORWARD>> logo and identity. Each newsletter will also direct readers to the project’s website, identify points of contact, and

promote upcoming events. Using Adobe’s InDesign platform, Moore & Associates holds extensive newsletter design experience completing pieces for CalACT, Stockton Metropolitan Airport, Visalia Municipal Airport, and more.

Media Invitations

As in Task 1, we will design eye-catching invitations to each public event to be distributed to all regional media outlets as identified in our media matrix. All invitations will be submitted to SCRTPA’s project manager for review using the ConceptShare platform outlined above. This will allow for timely feedback and rapid turnaround of the final deliverable.

Open Houses

Moore & Associates will assist the SCRTPA in coordinating up to six open house events. These events are intended to introduce ShastaFORWARD>> to the community as well as collect data providing an overview of community values relating to growth and development in the Shasta County region. As indicated in Task 1, our team’s experience in special event planning and marketing will result in community events that are well-organized and sufficiently advertised. Recently, our work in support of Visalia City Coach’s 25th Anniversary increased the awareness of public transit in the region while similar efforts supporting Stockton Metropolitan Airport’s service to Las Vegas solidified the Airport’s position as a community asset and increased the airport’s passenger boardings to an all-time high.

Conforming to the CAE&E, materials created for the open houses will be designed to entertain as well as educate. Full-color maps detailing growth scenarios, participatory activities utilizing the ARS (“clicker”) system, and the “current trends” scenario, as well as other items to be developed in conjunction with the SCRTPA, will be used to enlighten the community regarding ShastaFORWARD>>. When appropriate, open house materials will also be made available on the project website.

Moore & Associates will document each event through photographs, take-home collateral, and a record of discussions and ARS results, if applicable. A summary of each event will be provided to SCRTPA’s project manager within three business days. Comprehensive documentation of the open houses will also be included in our final report at the conclusion of the project.

We understand that the SCRTPA is in discussions with a local television outlet (KIXE, North State PBS) to produce a multi-episode television program featuring the ShastaFORWARD>> program. We are more than willing to partner with KIXE on the development of the program. Moore & Associates has the resources to take radio and video projects from concept to completion using a combination of in-house talent and successful vendor relationships. Recently, Moore & Associates produced a Spanish-language video for Concord's Monument Boulevard Community. The film outlined the benefits of public transportation, addressed culturally-sensitive barriers to usage, and provided trip planning instructions. This film and other Moore & Associates-produced media can be viewed at moore-associates.net.

Presentation Boards

Moore & Associates will prepare up to six large-scale presentation boards for display at open houses and any other public events. We will also design take-home collateral summarizing the content of each display. All display and handout materials will be submitted to SCRTPA's project manager no less than fourteen days prior to the first open house for review and comment. Once we have received approval of final proofs, we will produce the displays and take-home collateral.

Deliverables: Community Awareness, Education, & Engagement Plan, telephone survey, project "brand" (logos, etc.), media buys, ShastaFORWARD>> website, project newsletters, event invitations, open house preparation, information boards and accompanying take-home collateral, event summary reports.

Task 3: Explore and Refine Potential Growth Themes

We see Task 3 as a turning point in the ShastaFORWARD>> process, for it is at this point that we move beyond introductions and explanations of the process and its purpose and begin to see the actual direction and themes of the process take shape. What are the highest priorities for constituents as the future of Shasta County is staked out? It is during this stage that priorities will begin to emerge, and we will realize graphic illustration of the relative significance the community places on factors such as maintaining "distinct urban areas," preserving open space, creating "walkable commutes," facilitating greater use of public transit, focusing on general quality-of-life issues ("live, work, play"), and others.

We believe our team's experience in gauging public sentiment will serve well in the execution of Task 3, generating regional growth themes that mirror constituents' beliefs and priorities and capture the essence of the public input received up to and through this stage of the process. By capturing, organizing, and distilling the community's priorities and values, we will be well-prepared for the subsequent stages of the process, in which scenario models will be created in preparation for an informed decision to be rendered.

Focus Groups

Focus groups are an excellent method for obtaining input regarding public opinion and perceptions. Moore & Associates will facilitate as many as three stakeholder/community leader focus group sessions utilizing ARS to gather participant input and feedback. We will document each focus group through comprehensive minutes, photographs, and a list of participants. Minutes will be provided to SCRTPA's project manager within three business days. Appropriate documentation will also be included in our final report at the conclusion of the project.

Visual Preference and Paired Comparison Survey

Using growth themes identified during prior tasks and in conjunction with SCRTPA, Moore & Associates will develop a visual preference and paired comparison survey for use in public meetings. This survey will elicit community response through the use of easy-to-understand illustrations and comparisons, enabling participants to prioritize the growth principles under discussion. An on-line version of the survey will be added to the *ShastaFORWARD>>* website. Results from the on-line survey as well as those completed at public meetings will be tabulated to help prioritize growth themes.

Presentation Boards

Moore & Associates will prepare up to six large-scale topical presentation boards for display at public meetings. We will also design take-home collateral to be distributed to attendees. As in Task 2, all display and handout materials will be submitted to SCRTPA's project manager no less than ten days prior to the first event for review and comment. Once we have received approval of final proofs, we will produce the displays and take-home collateral.

Moore & Associates will document each public meeting through comprehensive minutes, photographs, take-home collateral, and a list of participants. Minutes will be provided to SCRTPA's project manager within three business days. Comprehensive documentation will also be included in our final report at the conclusion of the project.

Graphical Interface for Final Selected Growth Principles

Using the final selected growth principles, Moore & Associates will create a graphical interface allowing respondents to select preferred growth principles based on pictorial representations. Illustrations, charts, graphs, and/or symbols will represent levels of growth in various categories. We will create several adaptations of the interface for online, hard copy, and instant polling formats.

Deliverables: Focus group summary reports, visual preference and paired comparison survey, information boards, graphical interface for final selected growth principles.

Task 4: Presentation of Regional Growth Scenarios

We are confident that the work product of Task 3 will produce ample, quality input from which the SCRTPA will be able to develop appropriate growth scenarios to be presented to the public. It is our understanding the SCRTPA plans to present these scenarios to the public in a map-based format along with accompanying performance measures.

The community outreach efforts of Task 4 will be designed to facilitate stakeholders' understanding of each scenario and its advantages and disadvantages. The scenarios will be presented in a straightforward way, avoiding "loaded phrasing" and value-laden expressions such as "smart growth."

In this phase of the process, the citizen will feel as though he or she is "in the seat of the policy maker." We will present the information one would need to render a well-informed decision, and ask the stakeholder to evaluate the information and prepare to arrive at a carefully considered conclusion.

Print and on-line materials are only effective if they convey the proper message, are free of errors, and speak to the audience. As a result, the sharing of ideas and feedback is critical to

the creation of effective collateral. As in previous tasks, all materials — both print and electronic — will be created with ample opportunity for multiple reviews by SCRTPA’s project manager. Our use of the ConceptShare platform, as detailed in Task 2, will allow for an easier review and editing process, resulting in higher-quality deliverables.

Open Houses and Targeted Presentations

Moore & Associates will assist the SCRTPA in coordinating up to four open house events. These events are intended to present growth scenarios as developed by the SCRTPA to the public. Maps illustrating the growth scenarios, as well as accompanying performance indicators, will be presented to the public during these open houses, as well as through the internet and community presentations. The culmination of these events will be part two of KIXE’s coverage of the ShastaFORWARD>> project.

Conforming to the CAE&E Plan, all communication materials created for the open houses will be designed to catch the attention of participants while conveying important information about the project. Moore & Associates will design poster-size display boards and take-home handouts, as well as any other print materials desired, for each of the open houses.

Moore & Associates will document each open house and presentation through photographs, take-home collateral, and a record of discussions and ARS results, if applicable. A summary of each event will be provided to SCRTPA’s project manager within three business days. Comprehensive documentation of the open houses will also be included in our final report at the conclusion of the project.

“Virtual Open House”

Using the materials created for the Task 4 open houses, Moore & Associates will create an online “virtual open house” presentation, allowing residents who are unable to attend the open houses in person to participate in the process. The on-line version will feature an interactive slide show, survey, and web-formatted adaptations of all communication materials.

Deliverables: Open houses, targeted presentations, communication materials, on-line “virtual open house” presentation.

Task 5: Selection of Preferred Regional Growth Scenario

It is in the execution of Task 5 that we see the groundwork of previous tasks pay off in the form of tangible, valuable input from a representative cross-section of the community. While the earlier efforts are geared toward assessment of values, establishment of themes, and conceptual input, this task is oriented toward the presentation of specific options and a stakeholder vote on those options.

Graphics-Based Interface Tool

In Task 5, we will create a two-part interface to facilitate public participation. The first part will consist of a representative map and overview for each scenario, as well as a combined performance measure comparison table to enable citizens to evaluate the scenarios in direct comparison with each other. The second part will include an icon-based survey and questionnaire, as described in the RFP. These items will allow participants to compare each scenario and assess the advantages and disadvantages of each. The performance measures to be included will be developed by the SCRTPA based on themes identified in previous tasks, but are expected to include factors such as air quality, water usage, economic growth, commute times, and housing.

We believe our team's experience and graphics capabilities will result in user-friendly, educational, and graphically attractive interfaces engaging the community and portraying an accurate picture of the public's sentiments on the future growth of Shasta County. The interface will allow participants to render decisions while minimizing the time investment needed to arrive at informed conclusions. Upon completion of the interface tool, we will create versions appropriate for use in print, on the web, and in conjunction with "clicker" instant polling format.

Employing the same review process as in previous tasks, Moore & Associates will design print materials for presentations and public outreach meetings. These materials will include an 8.5 x 11-inch, 6-panel, full-color overview brochure and up to eight foam board-mounted display boards with accompanying handouts.

Public Workshops

Further, in this task we will continue our facilitation role for a series of up to six open houses and targeted outreach meetings. Our experience in identifying and communicating with specific constituencies will enable us to achieve the SCRTPA's goal of reaching organizations and entities that represent those of limited means or who do not typically have access to the planning process.

Throughout this process, the audience response system technology will be employed to encourage participation and discussion, as well as track demographic information on the participants. In addition, we will track voting information including the method and timing of votes received in order to assess the effectiveness of various outreach efforts.

Deliverables: Graphics-based interface tool, print materials, vote tracking report, summary report of public workshops.

Task 6: Community Summit/Final Report

If there is an “end product” of the community outreach and engagement effort, it is the final project report. This report will not only summarize all activities undertaken during the outreach and engagement process, but also will serve as a foundation document to preserve and perpetuate the methodology of the project, helping to facilitate implementation of the newly created regional growth vision on an ongoing basis. The report will provide the documentation and “road map” policy makers will need in the future as they implement the regional growth scenario. Also, this document will “close the loop” in terms of community participation and feedback, sending citizens the message that their input has been valued, carefully considered, and put into action.

The report shall be viewed as a work in progress throughout all stages of the ShastaFORWARD>> outreach project. A basic outline of the report will be generated early in the process, and we will continue to “fill in the blanks,” so to speak, as the project progresses.

Our goal for this report is nothing less than excellence in both style and substance. Our award-winning team is highly adept at not only generating visually-pleasing graphics and designs for both print and electronic communications, but also at ensuring the visuals are supported by solid, informative, well-written, well-edited content. In addition, our report will

be prepared with a general public audience in mind, speaking in layman's terms without being overly technical.

Telephone Survey

As a final project activity, a second telephone survey will be administered, using the same methodology and questionnaire that was originally administered at the beginning of the project. Results will be tabulated using SPSS and an analysis of the data will be performed. The final product will be a comparison of the results with those from the baseline survey undertaken in Task 2.

Final Report

Moore & Associates will design and create a high-quality final report on ShastaFORWARD>>. The report is expected to consist of 75 to 100 full-color panels (8.5 x 11 inches) created in Adobe InDesign and suitable for print production. It is understood some of the panels will consist of fold-out maps. Included in the report will be photos, news clippings, quotes, public input, event summaries, printed collateral, and other relevant information about the project, media coverage, public participation, etc.

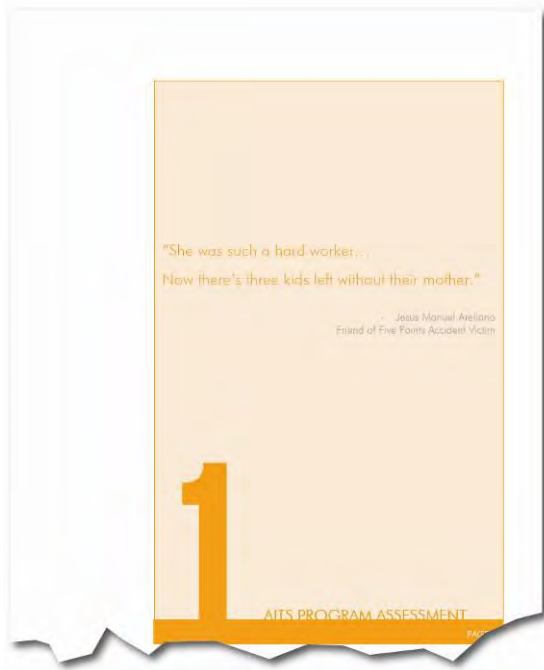
Presentations

The culmination of the project will consist of co-presentation with the SCRTPA of the final report at the meetings of the county board of supervisors and each of the three city councils. Moore & Associates will create appropriate supporting materials (Microsoft Powerpoint, video, etc.) to aid in the presentation, as deemed appropriate by the SCRTPA. The final report and presentations will be completed no later than November 2008.

Deliverables: Telephone survey report, final report, presentations.

INDESIGN-SPECIFIC SAMPLES





CREATIVE SAMPLES

VACAVILLE CITY COACH

Bilingual shelter posters and print advertisements were developed in support of Vacaville City Coach's new routes. Utilizing testimonials, the artwork urges the target demographics to consider City Coach's services as a solution to growing mobility needs.

Nuevas rutas. **Más rápido** servicio.



¡PRÓXIMAMENTE! Efectivo a partir de 30 de abril, 2007, Vacaville City Coach ofrece nuevas rutas, horarios de 30 minutos, 15¢ transferencias, y viajes ilimitados para pases mensuales (por los meses de mayo y junio pague la mitad de la tarifa). Para más información, visite nuestra página de Internet.

VACAVILLE CITY COACH
707.449.6000 | citycoach.com

I was tired. I was tired of you stealing from me. I was tired of paying for you over and over and over again, and gaining nothing. I was tired of wondering when you were going to work.

I needed more. I needed something reliable. Something efficient. Something that put money in my pocket.

I made the change. So long, dear automobile. **Hello, City Coach.**



THE WAIT IS OVER! Effective April 30, 2007, Vacaville City Coach will offer new routes, 30 minute schedules, 15¢ transfers, and unlimited ride monthly passes (1/2 off during May and June). Will you and your car be taking a break? It's about time to try City Coach. For more information, visit us online.

VACAVILLE CITY COACH
707.449.6000 | citycoach.com

This is Ken. He's a father. A sports fan (except tennis). An entrepreneur. An art collector. And he just learned how much money he'll save when he uses Vacaville City Coach to get to work. **Look how happy Ken is.**



THE WAIT IS OVER! Effective April 30, 2007, Vacaville City Coach will offer new routes, 30 minute schedules, 15¢ transfers, and unlimited ride monthly passes (1/2 off during May and June). City Coach just made getting to work a lot easier. For more information, visit us online.

VACAVILLE CITY COACH
707.449.6000 | citycoach.com

Allow me to introduce you to Sean. He's a fifth grader. A point guard. A ladies' man. And in his dreams, he's a NASCAR driver. He just got out of school, and thanks to Vacaville City Coach, he's on his way to basketball practice. **Watch out Kobe. He's comin' for you.**



THE WAIT IS OVER! Effective April 30, 2007, Vacaville City Coach will offer new routes, 30 minute schedules, 15¢ transfers, and unlimited ride monthly passes (1/2 off during May and June). It's no race car, but City Coach gets you around town. Fast. For more information, visit us online.

VACAVILLE CITY COACH
707.449.6000 | citycoach.com

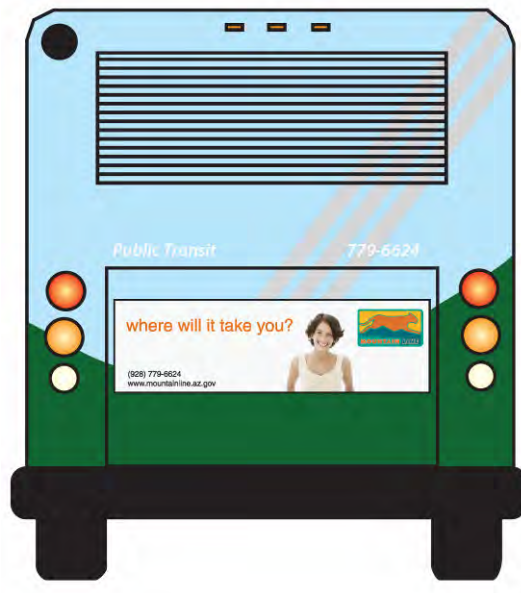
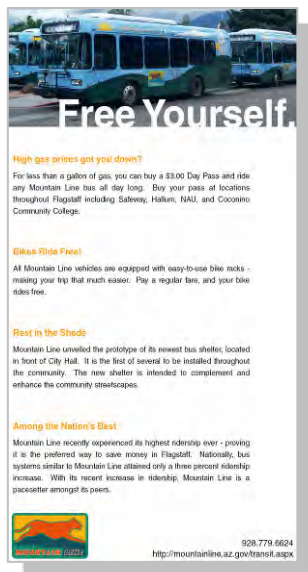
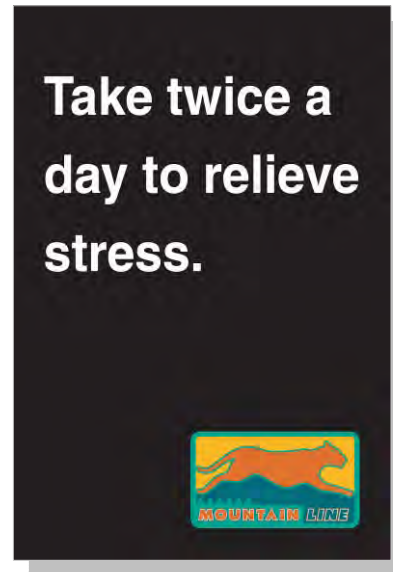
VICTOR VALLEY TRANSIT AUTHORITY (VVTa)

A 12-minute video, paired with direct mail pieces, website development, posters, and a targeted tri-fold brochure, were produced in support of VVTa's Bus Buddies program. The travel training campaign has since reduced the community's dependence on VVTa's Paratransit service by communicating the independence and freedom found in the fixed-route service.



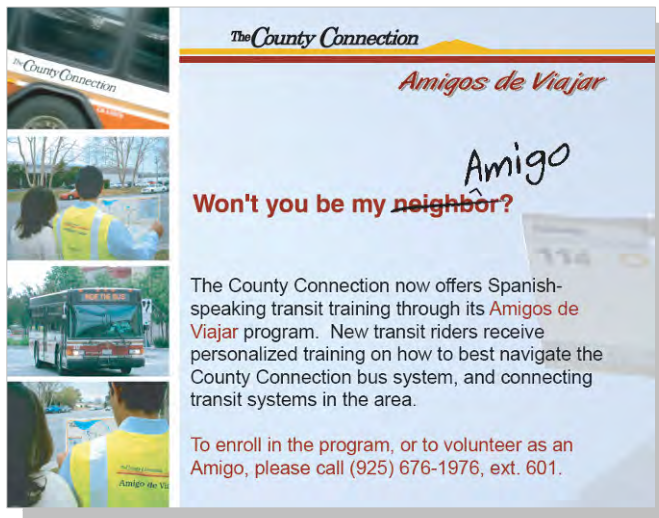
MOUNTAIN LINE

A combination of exterior vehicle advertisements, shelter posters, and print advertisements asked current (and prospective) customers how they might utilize Mountain Line. Understanding Flagstaff's sensitivity to nighttime light sources, the backlit shelter posters were designed with darker colors intended to absorb any extra light.



COUNTY CONNECTION

Bilingual car cards, posters, pocket-sized reference cards, and a 9-minute film were developed as part of County Connection's *Amigos de Viajar* program. The program has since increased the transit system's role within the community and increased transit ridership within the Spanish-speaking community.



The County Connection
Amigos de Viajar

Amigo
Won't you be my neighbor?

The County Connection now offers Spanish-speaking transit training through its *Amigos de Viajar* program. New transit riders receive personalized training on how to best navigate the County Connection bus system, and connecting transit systems in the area.

To enroll in the program, or to volunteer as an Amigo, please call (925) 676-1976, ext. 601.




Bikes

Each bike rack holds two (2) bikes. Riders are responsible for loading, unloading, and securing their own bikes.

Children 12 and under must be accompanied by an adult when riding.

Bike rack must be secured in a locked position if there is no rider on board.

The County Connection is not responsible for theft, loss of, or damage to bikes carried onboard buses or at bus stops.

Connecting Services

BART (925) 676-2278 www.bart.gov	www.bart.gov
Tri Delta Transit (925) 754-6622 www.tridelta.org	www.tridelta.org
WestCat (510) 724-7993 www.westcat.org	www.westcat.org
Wheels (LAVTA) (925) 455-7500 www.wheels.org	www.wheels.org
A.C. Transit (510) 817-1717 www.actransit.org	www.actransit.org
Benicia Transit (707) 745-0815 www.ci.benicia.ca.us	www.ci.benicia.ca.us
Fairfield-Suisun Transit (707) 428-7635 www.ci.fairfield.ca.us	www.ci.fairfield.ca.us
Altamont Commuter Express (ACE) (209) 944-6220 www.acebus.com	www.acebus.com
Capitol Corridor (877) 974-3322 www.capitolcorridor.org	www.capitolcorridor.org

The County Connection
Amigos de Viajar

Includes information on general service, fares, connecting services, and more!

925.676.7500 www.cccta.org

VISALIA CITY COACH

Shelter posters and exterior vehicle advertisements and mouse pad giveaways were designed in support of a fresh approach to marketing the City of Visalia's transit services. The game show theme continues today broadcasting radio spots during peak hour commute times in an effort to attract "choice" riders.

What's missing?



B S

You too can benefit from public transit! Those who ride Visalia City Coach a few days a week notice they save more money, have more time to catch up on sleep, work, or reading, and even meet new people.

Next time you reach for your car keys, try VCC and experience all the benefits it has to offer!

559.713.4950 | www.ridevcc.com



And for the Grand Prize...

Why do over 1.4 million Visalia residents use public transit?



Samantha

Because it's easier than driving.



Linda

It's affordable.



Brian

To meet new people.

559.713.4950 | www.ridevcc.com



Question:

Why do 1.4 million VCC riders leave their cars behind every year?

Final Answer:

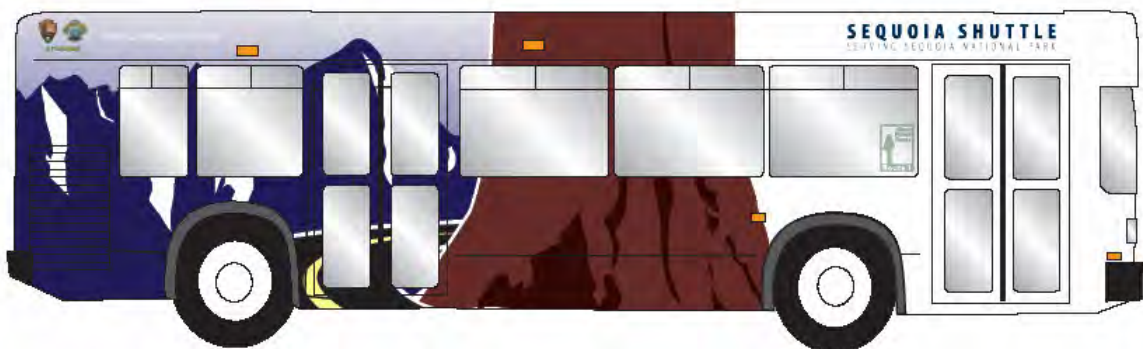
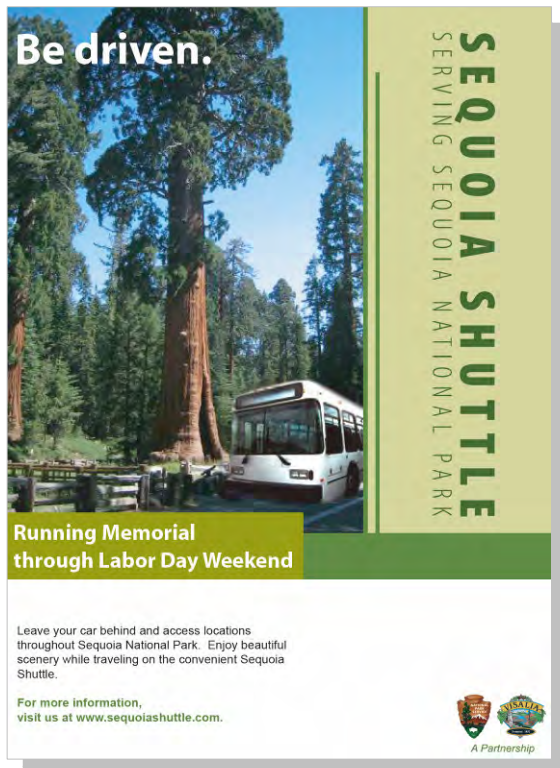


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SEQUOIA SHUTTLE

A bilingual website and system brochure, cohesive print advertisements, and a physically-impressive vehicle branding design help launch Sequoia National Park's inaugural transit system, Sequoia Shuttle, May 2007. Grassroots marketing (online forums, discussion groups, and special interests communities) have created a buzz of excitement for the new transit system.



ELECTRONIC MEDIA

The compact disc contains samples of electronic media written, directed, and produced by Moore & Associates. The compact disc is a collection of work we have completed in a number of diverse transit communities, and should in no way be perceived as the limit to our creative ability.

SCHEDULE

TASKS		JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER				JANUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																													
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SMALL BUSINESS CERTIFICATION



State of California • Department of General Services • Arnold Schwarzenegger, Governor

PROCUREMENT DIVISION

Office of Small Business and DVBE Certification

707 Third Street, 1st Floor, Room 400 • PO Box 989052

West Sacramento, California 95798-9052 • (800) 559-5529

SB APP 20040428

April 28, 2004

REF# 0023183
MOORE & ASSOCIATES INC
25530 AVENUE STANFORD #208
VALENCIA CA 91355

Dear Business Person:

Congratulations on your certified small business status with the State of California. Your certification entitles you to benefits under the state's Small Business Participation Program within state contracting, including a five percent bidding preference and special provisions under the Prompt Payment Act.

Certification period

Your certification period for each business type is:

Industry

SERVICE



Annual Submission Requirements

To maintain your certified status, you must annually submit to the Office of Small Business and DVBE Certification (OSDC), proof of annual receipts and proof of employees for your firm and each of your affiliates (if any).

Proof of Annual Receipts

Submit to OSDC, a copy of your firm's and any affiliate firm's ENTIRE federal tax return each year following your certification. Include ALL accompanying schedules, forms, statements, and any other support documents filed with that specific tax return.

If you request a tax filing extension with the Internal Revenue Service, submit to our office a copy of the extension form. When your tax returns are filed, submit a copy of the entire federal tax return to our office.

Proof of Employees

If you have employees whose taxable wages are reported to the California Employment Development Department (EDD) on a quarterly basis, you must annually submit to our office along with your proof of annual receipts, proof of employees for your firm and any affiliates.

We will accept a copy of the EDD's "Quarterly Wage and Withholding Report" (Form DE6) or other format accepted by the EDD. Your employee documents must cover the same four quarters as the tax return you submit for your proof of annual receipts.

If you have out-of-state employees, submit the employee documentation comparable to EDD's "Quarterly Wage and Withholding Report" for the same four-quarter period.

Self-Maintained Online Profile