PROFESSIONAL SERVICES AGREEMENT
City Manager's Office
701 Laurel St., Menlo Park, CA 94025
tel 650-330-6620

AGREEMENT FOR SERVICES BETWEEN
THE CITY OF MENLO PARK AND STEER DAVIES & GLEAVE, INC.

THIS AGREEMENT made and entered into at Menlo Park, California, this ___ day of ___ 20___, by and between the CITY OF MENLO PARK, a Municipal Corporation, hereinafter referred to as "CITY," and STEER DAVIES & GLEAVE, INC., hereinafter referred to as "FIRST PARTY."

WITNESSETH:

WHEREAS, CITY desires to retain FIRST PARTY to provide certain professional services for CITY in connection with that certain project called: Transportation Management Association Feasibility Study

WHEREAS, FIRST PARTY is licensed to perform said services and desires to and does hereby undertake to perform said services.

NOW, THEREFORE, IN CONSIDERATION OF THE MUTUAL COVENANTS, PROMISES AND CONDITIONS of each of the parties hereto, it is hereby agreed as follows:

1. SCOPE OF WORK

In consideration of the payment by CITY to FIRST PARTY, as hereinafter provided, FIRST PARTY agrees to perform all the services as set forth in Exhibit "A," Scope of Services.

2. SCHEDULE FOR WORK

FIRST PARTY's proposed schedule for the various services required pursuant to this agreement will be as set forth in Exhibit "A," Scope of Services. CITY will be kept informed as to the progress of work by written reports, to be submitted monthly or as otherwise required in Exhibit "A." Neither party shall hold the other responsible for damages or delay in performance caused by acts of God, strikes, lockouts, accidents or other events beyond the control of the other, or the other's employees and agents.

FIRST PARTY shall commence work immediately upon receipt of a "Notice to Proceed" from CITY. The "Notice to Proceed" date shall be considered the "effective date" of the agreement, as used herein, except as otherwise specifically defined. FIRST PARTY shall complete all the work and deliver to CITY all project related files, records, and materials within one month after completion of all of FIRST PARTY's activities required under this agreement.

3. PROSECUTION OF WORK

FIRST PARTY will employ a sufficient staff to prosecute the work diligently and continuously and will complete the work in accordance with the schedule of work approved by the CITY. (See Exhibit "A," Scope of Services).
## 4. COMPENSATION AND PAYMENT

A. CITY shall pay FIRST PARTY an all-inclusive fee that shall not exceed $100,000 as described in Exhibit "A," Scope of Services. All payments shall be inclusive of all indirect and direct charges to the Project incurred by FIRST PARTY. The CITY reserves the right to withhold payment if the City determines that the quantity or quality of the work performed is unacceptable.

B. FIRST PARTY’s fee for the services as set forth herein shall be considered as full compensation for all indirect and direct personnel, materials, supplies and equipment, and services incurred by FIRST PARTY and used in carrying out or completing the work.

C. Payments shall be monthly for the invoice amount or such other amount as approved by CITY. As each payment is due, the FIRST PARTY shall submit a statement describing the services performed to CITY. This statement shall include, at a minimum, the project title, agreement number, the title(s) of personnel performing work, hours spent, payment rate, and a listing of all reimbursable costs. CITY shall have the discretion to approve the invoice and the work completed statement. Payment shall be for the invoice amount or such other amount as approved by CITY.

D. Payments are due upon receipt of written invoices. CITY shall have the right to receive, upon request, documentation substantiating charges billed to CITY. CITY shall have the right to perform an audit of the FIRST PARTY’s relevant records pertaining to the charges.

## 5. EQUAL EMPLOYMENT OPPORTUNITY

A. FIRST PARTY, with regard to the work performed by it under this agreement shall not discriminate on the grounds of race, religion, color, national origin, sex, handicap, marital status or age in the retention of sub-consultants, including procurement of materials and leases of equipment.

B. FIRST PARTY shall take affirmative action to insure that employees and applicants for employment are treated without regard to their race, color, religion, sex, national origin, marital status or handicap. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment advertising; layoff or termination; rates of pay or other forms of compensation and selection for training including apprenticeship.

C. FIRST PARTY shall post in prominent places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.

D. FIRST PARTY shall state that all qualified applications will receive consideration for employment without regard to race, color, religion, sex, national origin, marital status or handicap.

E. FIRST PARTY shall comply with Title VI of the Civil Rights Act of 1964 and shall provide such reports as may be required to carry out the intent of this section.

F. FIRST PARTY shall incorporate the foregoing requirements of this section in FIRST PARTY’s agreement with all sub-consultants.

## 6. ASSIGNMENT OF AGREEMENT AND TRANSFER OF INTEREST

A. FIRST PARTY shall not assign this agreement, and shall not transfer any interest in the same (whether by assignment or novation), without prior written consent of the CITY thereto, provided, however, that claims for money due or to become due to the FIRST PARTY from the CITY under this agreement may be assigned to a bank, trust company, or other financial institution without such approval. Notice of an intended assignment or transfer shall be furnished promptly to the CITY.

B. In the event there is a change of more than 30 percent of the stock ownership or ownership in FIRST PARTY from the date of this agreement is executed, then CITY shall be notified before the date of said change of stock ownership or interest and CITY shall have the right, in event of such change in stock ownership or interest, to terminate this agreement upon notice to FIRST PARTY. In the event CITY is not notified of any such change in stock ownership or interest, then upon knowledge of same, it shall be deemed that CITY has terminated this agreement.
7. INDEPENDENT WORK CONTROL

It is expressly agreed that in the performance of the service necessary for compliance with this agreement, FIRST PARTY shall be and is an independent contractor and is not an agent or employee of CITY. FIRST PARTY has and shall retain the right to exercise full control and supervision of the services and full control over the employment, direction, compensation and discharge of all persons assisting FIRST PARTY in the performance of FIRST PARTY's services hereunder. FIRST PARTY shall be solely responsible for its own acts and those of its subordinates and employees.

8. CONSULTANT QUALIFICATIONS

It is expressly understood that FIRST PARTY is licensed and skilled in the professional calling necessary to perform the work agreed to be done by it under this agreement and CITY relies upon the skill of FIRST PARTY to do and perform said work in a skillful manner usual to the profession. The acceptance of FIRST PARTY’s work by CITY does not operate as a release of FIRST PARTY from said understanding.

9. NOTICES

All notices hereby required under this agreement shall be in writing and delivered in person or sent by certified mail, postage prepaid or by overnight courier service. Notices required to be given to CITY shall be addressed as follows:

Justin I. C. Murphy
Public Works
City of Menlo Park
701 Laurel St.
Menlo Park, CA 94025
650-330-6740
nmnelgar@menlopark.org

Notices required to be given to FIRST PARTY shall be addressed as follows:

Lisa Buchanan
Steer Davies & Gleave, Inc.
800 Wilshire Blvd, Suite 1320
Los Angeles, CA 90017
213-425-0990
Lisa.Buchanan@steergroup.com

Provided that any party may change such address by notice, in writing, to the other party and thereafter notices shall be addressed and transmitted to the new address.

10. HOLD HARMLESS

The FIRST PARTY shall defend, indemnify and hold harmless the CITY, its subsidiary agencies, their officers, agents, employees and servants from all claims, suits or actions that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the FIRST PARTY brought for, or on account of, injuries to or death of any person or damage to property resulting from the performance of any work required by this agreement by FIRST PARTY, its officers, agents, employees and servants. Nothing herein shall be construed to require the FIRST PARTY to defend, indemnify or hold harmless the CITY, its subsidiary agencies, their officers, agents, employees and servants against any responsibility to liability in contravention of Section 2782.8 of the California Civil Code.
11. INSURANCE

A. FIRST PARTY shall not commence work under this agreement until all insurance required under this Section has been obtained and such insurance has been approved by the City, with certificates of insurance evidencing the required coverage.

B. There shall be a contractual liability endorsement extending the FIRST PARTY's coverage to include the contractual liability assumed by the FIRST PARTY pursuant to this agreement. These certificates shall specify or be endorsed to provide that thirty (30) days' notice must be given, in writing, to the CITY, at the address shown in Section 9, of any pending cancellation of the policy. FIRST PARTY shall notify CITY of any pending change to the policy. All certificates shall be filed with the City.

1. Workers' compensation and employer's liability insurance:
The FIRST PARTY shall have in effect during the entire life of this agreement workers' compensation and Employer's Liability Insurance providing full statutory coverage. In signing this agreement, the FIRST PARTY makes the following certification, required by Section 18161 of the California Labor Code: "I am aware of the provisions of Section 3700 of the California Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Code, and I will comply with such provisions before commencing the performance of the work of this agreement" (not required if the FIRST PARTY is a Sole Proprietor).

2. Liability insurance:
The FIRST PARTY shall take out and maintain during the life of this agreement such Bodily Injury Liability and Property Damage Liability Insurance (Commercial General Liability Insurance) on an occurrence basis as shall protect it while performing work covered by this agreement from any and all claims for damages for bodily injury, including accidental death, as well as claims for property damage which may arise from the FIRST PARTY's operations under this agreement, whether such operations be by FIRST PARTY or by any sub-consultant or by anyone directly or indirectly employed by either of them. The amounts of such insurance shall be not less than one million dollars ($1,000,000) per occurrence and one million dollars ($1,000,000) in aggregate, or one million dollars ($1,000,000) combined single limit bodily injury and property damage for each occurrence. FIRST PARTY shall provide the CITY with acceptable evidence of coverage, including a copy of all declarations of coverage exclusions. FIRST PARTY shall maintain Automobile Liability Insurance pursuant to this agreement in an amount of not less than one million dollars ($1,000,000) for each accident combined single limit or not less than one million dollars ($1,000,000) for any one (1) person, and one million dollars ($1,000,000) for any one (1) accident, and Three Hundred Thousand Dollars, ($300,000) property damage.

3. Professional liability insurance:
FIRST PARTY shall maintain a policy of professional liability insurance, protecting it against claims arising out of the negligent acts, errors, or omissions of FIRST PARTY pursuant to this agreement, in the amount of not less than one million dollars ($1,000,000) per claim and in the aggregate. Said professional liability insurance is to be kept in force for not less than one (1) year after completion of services described herein.

C. CITY and its subsidiary agencies, and their officers, agents, employees and servants shall be named as additional insured on any such policies of Commercial General Liability and Automobile Liability Insurance, (but not for the Professional Liability and workers' compensation), which shall also contain a provision that the insurance afforded thereby to the CITY, its subsidiary agencies, and their officers, agents, employees, and servants shall be primary insurance to the full limits of liability of the policy, and that if the CITY, its subsidiary agencies and their officers and employees have other insurance against a loss covered by a policy, such other insurance shall be excess insurance only.

D. In the event of the breach of any provision of this Section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, CITY, at its option, may, notwithstanding any other provision of this agreement to the contrary, immediately declare a material breach of this agreement and suspend all further work pursuant to this agreement.

E. Before the execution of this agreement, any deductibles or self-insured retentions must be declared to and approved by CITY.
# 12. PAYMENT OF PERMITS/LICENSES

Contractor shall obtain any license, permit, or approval if necessary from any agency whatsoever for the work/services to be performed, at his/her own expense, before commencement of said work/services or forfeit any right to compensation under this agreement.

# 13. RESPONSIBILITY AND LIABILITY FOR SUB-CONSULTANTS AND/OR SUBCONTRACTORS

Approval of or by CITY shall not constitute nor be deemed a release of responsibility and liability of FIRST PARTY or its sub-consultants and/or subcontractors for the accuracy and competency of the designs, working drawings, specifications or other documents and work, nor shall its approval be deemed to be an assumption of such responsibility by CITY for any defect in the designs, working drawings, specifications or other documents prepared by FIRST PARTY or its sub-consultants and/or subcontractors.

# 14. OWNERSHIP OF WORK PRODUCT

Work products of FIRST PARTY for this project, which are delivered under this agreement or which are developed, produced and paid for under this agreement, shall become the property of CITY. The reuse of FIRST PARTY's work products by City for purposes other than intended by this agreement shall be at no risk to FIRST PARTY.

# 15. REPRESENTATION OF WORK

Any and all representations of FIRST PARTY, in connection with the work performed or the information supplied, shall not apply to any other project or site, except the project described in Exhibit "A" or as otherwise specified in Exhibit "A."

# 16. TERMINATION OF AGREEMENT

A. CITY may give thirty (30) days written notice to FIRST PARTY, terminating this agreement in whole or in part at any time, either for CITY's convenience or because of the failure of FIRST PARTY to fulfill its contractual obligations or because of FIRST PARTY's change of its assigned personnel on the project without prior CITY approval. Upon receipt of such notice, FIRST PARTY shall:
   1. Immediately discontinue all services affected (unless the notice directs otherwise); and
   2. Deliver to the CITY all data, drawings, specifications, reports, estimates, summaries, and such other information and materials as may have been accumulated or produced by FIRST PARTY in performing work under this agreement, whether completed or in process.

B. If termination is for the convenience of CITY, an equitable adjustment in the contract price shall be made, but no amount shall be allowed for anticipated profit on unperformed services.

C. If the termination is due to the failure of FIRST PARTY to fulfill its agreement, CITY may take over the work and prosecute the same to completion by agreement or otherwise. In such case, FIRST PARTY shall be liable to CITY for any reasonable additional cost occasioned to the CITY thereby.

D. If, after notice of termination for failure to fulfill agreement obligations, it is determined that FIRST PARTY had not so failed, the termination shall be deemed to have been effected for the convenience of the CITY. In such event, adjustment in the contract price shall be made as provided in Paragraph B of this Section.

E. The rights and remedies of the CITY provided in this Section are in addition to any other rights and remedies provided by law or under this agreement.

F. Subject to the foregoing provisions, the CITY shall pay FIRST PARTY for services performed and expenses incurred through the termination date.
17. **INSPECTION OF WORK**

   It is FIRST PARTY's obligation to make the work product available for CITY's inspections and periodic reviews upon request by CITY.

18. **COMPLIANCE WITH LAWS**

   It shall be the responsibility of FIRST PARTY to comply with all State and Federal Laws applicable to the work and services provided pursuant to this agreement, including but not limited to compliance with prevailing wage laws, if applicable.

19. **BREACH OF AGREEMENT**

   A. This agreement is governed by applicable federal and state statutes and regulations. Any material deviation by FIRST PARTY for any reason from the requirements thereof, or from any other provision of this agreement, shall constitute a breach of this agreement and may be cause for termination at the election of the CITY.

   B. The CITY reserves the right to waive any and all breaches of this agreement, and any such waiver shall not be deemed a waiver of any previous or subsequent breaches. In the event the CITY chooses to waive a particular breach of this agreement, it may condition same on payment by FIRST PARTY of actual damages occasioned by such breach of agreement.

20. **SEVERABILITY**

   The provisions of this agreement are severable. If any portion of this agreement is held invalid by a court of competent jurisdiction, the remainder of the agreement shall remain in full force and effect unless amended or modified by the mutual consent of the parties.

21. **CAPTIONS**

   The captions of this agreement are for convenience and reference only and shall not define, explain, modify, limit, exemplify, or aid in the interpretation, construction, or meaning of any provisions of this agreement.

22. **LITIGATION OR ARBITRATION**

   In the event that suit or arbitration is brought to enforce the terms of this agreement, the prevailing party shall be entitled to litigation costs and reasonable attorneys' fees. The Dispute Resolution provisions are set forth on Exhibit "B," "Dispute Resolution" attached hereto and by this reference incorporated herein.

23. **RETENTION OF RECORDS**

   Contractor shall maintain all required records for three years after the City makes final payment and all other pending matters are closed, and shall be subject to the examination and/or audit of the City, a federal agency, and the state of California.

24. **TERM OF AGREEMENT**

   This agreement shall remain in effect for the period of July 1, 2019 through June 30, 2020 unless extended, amended, or terminated in writing by CITY.
25. ENTIRE AGREEMENT

This document constitutes the sole agreement of the parties hereto relating to said project and states the rights, duties, and obligations of each party as of the document's date. Any prior agreement, promises, negotiations, or representations between parties not expressly stated in this document are not binding. All modifications, amendments, or waivers of the terms of this agreement must be in writing and signed by the appropriate representatives of the parties to this agreement.

26. STATEMENT OF ECONOMIC INTEREST

Consultants, as defined by Section 18701 of the Regulations of the Fair Political Practices Commission, Title 2, Division 6 of the California Code of Regulations, are required to file a Statement of Economic Interests with 30 days of approval of a contract services agreement with the City or its subdivisions, on an annual basis thereafter during the term of the contract, and within 30 days of completion of the contract.

Based upon review of the Consultant's Scope of Work and determination by the City Manager, it is determined that Consultant IS NOT required to file a Statement of Economic Interest. A statement of Economic Interest shall be filed with the City Clerk's office no later than 30 days after the execution of the agreement.

IN WITNESS WHEREOF, the parties hereto have executed this agreement on the day and year first above written.

FOR FIRST PARTY:

[Signature]

LISA BUCHANAN
Printed name

45-0585269
Tax ID#

APPROVED AS TO FORM:

[Signature]

William L. McClure, City Attorney

FOR CITY OF MENLO PARK:

[Signature]

Starla Jeromie-Robinson, City Manager

ATTEST:

[Signature]

Judi A. Herren, City Clerk

08/01/19
Date

08/13/19
Date

8/14/19
Date

8/15/19
Date
EXHIBIT "A" – SCOPE OF SERVICES

A1. SCOPE OF WORK

FIRST PARTY agrees to provide consultant services for CITY's Public Works. In the event of any discrepancy between any of the terms of the FIRST PARTY's proposal and those of this agreement, the version most favorable to the CITY shall prevail. FIRST PARTY shall provide the following services: Provide consultant services set forth in Exhibit A-1, attached hereto.

FIRST PARTY agrees to perform these services as directed by the CITY in accordance with the standards of its profession and CITY's satisfaction.

A2. COMPENSATION

CITY shall pay FIRST PARTY an all-inclusive fee of $100,000 as described in Exhibit "A," Scope of Services. All payments, shall be inclusive of all indirect and direct charges to the Project incurred by FIRST PARTY. The CITY reserves the right to withhold payment if the City determines that the quantity or quality of the work performed is unacceptable.

FIRST PARTY's fee for the services as set forth herein shall be considered as full compensation for all indirect and direct personnel, materials, supplies and equipment, and services incurred by FIRST PARTY and used in carrying out or completing the work.

Payments shall be monthly for the invoice amount or such other amount as approved by CITY. As each payment is due, the FIRST PARTY shall submit a statement describing the services performed to CITY. This statement shall include, at a minimum, the project title, agreement number, the title(s) of personnel performing work, hours spent, payment rate, and a listing of all reimbursable costs. CITY shall have the discretion to approve the invoice and the work completed statement. Payment shall be for the invoice amount or such other amount as approved by CITY.

Payments are due upon receipt of written invoices. CITY shall have the right to receive, upon request, documentation substantiating charges billed to CITY. CITY shall have the right to perform an audit of the FIRST PARTY's relevant records pertaining to the charges.

A3. SCHEDULE OF WORK

FIRST PARTY'S proposed schedule for the various services required will be set forth in Exhibit A-1.

A4. CHANGES IN WORK -- EXTRA WORK

In addition to services described in Section A1, the parties may from time to time agree in writing that FIRST PARTY, for additional compensation, shall perform additional services including but not limited to:

- Change in the services because of changes in scope of the work.
- Additional tasks not specified herein as required by the CITY.

The CITY and FIRST PARTY shall agree in writing to any changes in compensation and/or changes in FIRST PARTY's services before the commencement of any work. If FIRST PARTY deems work he/she has been directed to perform is beyond the scope of this agreement and constitutes extra work, FIRST PARTY shall immediately inform the CITY in writing of the fact. The CITY shall make a determination as to whether such work is in fact beyond the scope of this agreement and constitutes extra work. In the event that the CITY determines that such work does constitute extra work, it shall provide compensation to the FIRST PARTY in accordance with an agreed cost that is fair and equitable. This cost will be mutually agreed upon by the CITY and FIRST PARTY. A supplemental agreement providing for such compensation for extra work shall be negotiated between the CITY and the FIRST PARTY. Such supplemental agreement shall be executed by the FIRST PARTY and may be approved by the City Manager upon recommendation of the Deputy City Manager.
### A5. BILLINGS

FIRST PARTY's bills shall include the following information: A brief description of services performed, project title and the agreement number; the date the services were performed; the number of hours spent and by whom; the current contract amount; the current invoice amount; Except as specifically authorized by CITY, FIRST PARTY shall not bill CITY for duplicate services performed by more than one person. In no event shall FIRST PARTY submit any billing for an amount in excess of the maximum amount of compensation provided in Section A2.

The expenses of any office, including furniture and equipment rental, supplies, salaries of employees, telephone calls, postage, advertising, and all other expenses incurred by FIRST PARTY in the performances of this agreement shall be incurred at the FIRST PARTY's discretion. Such expenses shall be FIRST PARTY's sole financial responsibility.
3 Scope of Work and Schedule

3.1 Our Approach for Menlo Park

We first set out our approach for Menlo Park, which will largely be the same for Foster City. At the end of this section, we highlight the key differences in approach for Foster City from what is set out below.

3.1.1 Project Management

Task 1: Project Inception and Kick off Meeting

Steer will conduct an in-person project kick-off meeting to introduce our staff to the Menlo Park project team and formally agree on project goals and schedule. We will:

- introduce the project and the project teams
- review scope, deliverables and timelines
- identify and assemble available data and information
- discuss relevant issues, challenges and expectations

Our objective for this meeting will be to understand the City’s vision for the TMA. This understanding will be crucial to understanding how each TMA model fits within the local context and aligns with the City’s actual long-term goals and objectives. We’ll want to examine:

- What are the biggest transportation challenges driving interest in TMAs and transportation demand management as a congestion management strategy?
- What is the economic and business environment like and can we anticipate that employers will be enthusiastic participants?
- What level of city resources are available for ongoing support of the TMA?

Task 2: Progress Reporting and invoicing

During the kick-off meeting, Project Manager Julia Wean will confirm the City’s preferred method for progress reporting and invoicing. We recommend bi-weekly check-ins with each city to update city staff on project progress and monthly invoicing, as well as monthly meetings with the entire client team.

3.1.2 Phase 1: Gather Commute Habit Data

We understand that 17,000 people work in the City of Menlo Park at roughly 800 registered businesses. During Phase I, Steer will collect data from local employers about their employee commute habits to better understand these daily travel patterns. To do so, Steer will engage the local business community, distribute travel surveys, and obtain geospatial data where possible.
The goal of this data collection will be to understand:

- How are people traveling to/from work in Menlo Park?
- What are the biggest (perceived) barriers to using alternative modes?
- Which alternative modes would be most attractive to those willing to try something else?
- What services would be most useful to people who want to explore new options?

Task 1: Outreach to Menlo Park Employers/ Organizations

Steer will lead outreach to the local business community to understand employers’ needs and concerns with respect to transportation and collect data about employee commute habits. We will use different outreach methods for large and medium/small businesses in order to reach a bigger sample of employers more efficiently. For example, we expect that the City will be able to help make initial contact with some of the largest employers, but to reach smaller organizations we may consider working closely with the Menlo Park Chamber of Commerce or similar organizations who are in regular contact with local employers.

Stakeholder Interviews:

Steer will work closely with city staff in Housing and Economic Development to develop a list of target employers from small, medium and large employers in both Menlo Park and Foster city. Steer will then work to schedule up to 10 in-person or teleconference interviews with high-ranking representatives at each of these employers. We will prioritize in-person interviews with the largest employers, such as Facebook and IBM, who account for the largest influx of daily commuters.

Initially, our goals will be to understand what, if any, transportation-related programs or services the employer currently provides and the rationale behind those investments. It will be important to understand how many and to what extent employers are working to provide alternatives for employees, what their current expenditures are, and what they view as the benefit to these programs.

We will devise an interview script/protocol that roughly addresses:

- Current commute trip reduction programs, if any
- Annual expenditures
- Company’s rationale for investment in commuter benefits
- Data related to employee travel patterns including mode split, preferences, perceived barrier
- Interest in participating in an Employer Task Force or in participating in a potential TMA
- Willingness to distribute additional surveys to employees and method for doing so (Task 2a) as well as any recent past experience of doing so (to best understand how to get the highest response rate)

We will arrange interviews with employer representatives who most closely fit the description of Employee Transportation Coordinator, usually a person in the Human Resources Department who is familiar with employee benefits and programs. As possible, we will also do our best to include higher-ranking representatives who have expanded decision-making power within their organizations.
A second goal of these interviews is to build rapport with the employer and secure their full commitment to the employee questionnaires in the next task; our experience is that their buy-in to the process and understanding of the value it brings makes a tangible difference to response.

**Medium and Small Business Outreach and Workshops:**

Steer will also host a small business workshop in Menlo Park in order to balance the perspectives of the large employers. This will be intended to make small businesses aware of the upcoming commuter survey and solicit champions within these smaller organizations to drive greater survey participation.

We have also budgeted for staff to spend half a day of time in Menlo Park completing “drop-in” outreach. We have found that for smaller retail and restaurant employers this strategy is often more successful than requesting that they attend workshops. The “drop-in” outreach will be targeted in downtown areas and other special districts under consideration for the Small/Med Employers TMA model.

**Task 2a: Collect Survey Data from Menlo Park and Foster City Organizations**

Steer will collect quantitative and qualitative data to understand commute habits for individuals traveling to Menlo Park. We strongly believe that the most value will come from the commute surveys which will provide the foundation for our analysis. Where appropriate, we will complement that data with city traffic counts and geospatial data provided by third-party companies. We understand the City of Menlo Park has recently acquired a license for Streetlight access and have included time for analysis of that data in our proposed budget. We anticipate using the data to collect origins and destinations of trips which finish and start at key Menlo Park employers, broken down by time of day and which route is traveled. Pass through traffic will also be analyzed if the data is available to us. We will confirm the extent of this when we gain access to the data. Our experience is that there are limitations with different data sets and we set those out briefly in the table below. We would like to discuss these with you at project kick off.

**Table 3.1: Limitations on Data Collection**

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Quantitative</th>
<th>Qualitative</th>
<th>Limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Surveys</td>
<td>- Mode share</td>
<td>Preferences, barriers</td>
<td>Privacy restrictions may limit the detail and scope of O-D data.</td>
</tr>
<tr>
<td></td>
<td>- Origin (zip)(^1) and</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>destination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Traffic counts</td>
<td>- Traffic volume</td>
<td></td>
<td>Provides an understanding of the most congested corridors but is less applicable to TMA operations.</td>
</tr>
<tr>
<td></td>
<td>- Level of Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial Datasets</td>
<td>Origin and destination</td>
<td></td>
<td>Can be costly.</td>
</tr>
<tr>
<td>(Streetlight)</td>
<td></td>
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</tr>
</tbody>
</table>

\(^1\) Employee privacy is typically a very significant issue when gathering data about commute travel patterns. Frequently, employers are unwilling to share information about home addresses. Therefore, it is unlikely that origin/destination data will be available at a level more specific than zip code, if at all. It is also unlikely that companies or individuals will permit collection of data from third-party applications.
The Employer Commute Survey provides the most valuable context for the development and deployment of TDM programs either by an organization itself or a TMA. Steer will develop this survey based on best practices we have developed from administering commute surveys in both the public and private sector. Survey questions will be designed to obtain information about daily commute modes, which will be used to establish mode share for each employer. In addition, qualitative questions will address preferences for one commute mode over another, barriers to behavior change, areas where transportation options could be improved and so on. These questions will provide background on how people commute, why they do so, and what services would be most suitable from a TMA or TDM service provider. Steer recently worked with Southwest Contra Costa County 511 and the City of San Ramon to administer their commuter survey and report on its findings. We will provide a draft of the survey questions to the City for review and comment before releasing the survey to employers.

We will work with Housing and Economic Development to identify the full list of local employers/organizations. Using that list, as well as contacts from our meetings in Task 1, we will solicit responses from at least 30-50% of local employees who receive the survey. We frequently work with employers to assist with survey administration as part of regional air quality regulation in Southern California which requires a minimum of a 60% response rate and have always had success. Based on our previous experience, the following steps can drastically improve survey response:

- Establish a set window during which time we would like the survey distributed and a deadline for all employee surveys to be submitted
- Provide ETCs and employer contacts with marketing material and language they can use to distribute electronic survey link (as well as paper surveys if deemed necessary).
- Encourage the delegation of survey distribution to team leaders and managers who are able to better encourage participation from those with whom they work closely.
- Provide incentives (i.e. gift cards) for ETCs that participate and achieve the desired participation levels within their worksites.
- Provide incentives (through raffles) for individuals who respond to the travel survey.

Additionally, we think it is important to set expectations for the raffle early by ensuring that we discuss it and emphasize its importance at our initial meetings with ETCs and other employer contacts. We will seek to understand from them what has been effective in their organizations for previous surveys.

**Task 2b: Analyze Existing Data**

Steer will conduct analysis of quantitative and qualitative data to establish a baseline for Phase 2 Analysis of TMA options as well as future performance monitoring should the city proceed with implementing a TMA. Data analysis will be conducted in Excel using outputs from electronic surveys and any available relevant traffic count data.
### Table 3.2: Data Analysis Metrics

<table>
<thead>
<tr>
<th>Data</th>
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<td>Mode share</td>
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<td></td>
<td>Percentage of employers who provide commuter benefits</td>
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<td>Most preferred alternative modes</td>
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<td>Most desired TDM program or service</td>
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### 3.1.3 Phase 2: Detailed Analysis of TMA Options

Phase 2 of the project will be dedicated to developing an options analysis report, based on criteria established by the City of Menlo Park. Steer will present five options and evaluate each according to the City’s criteria, as well as a cost-benefit analysis, and present recommendations for the best option(s). Following the selection of the best option, Steer will develop a TMA implementation framework in Phase 3.

**Task 1: TMA Background Research**

Steer will provide background research for the City of Menlo Park on best practices for local, regional and national TMA models to support the development of the alternatives to be considered.

Steer has considerable experience providing best practice research on TDM programs and implementing agencies, which we will draw upon for this task:

- Developed and/or relaunched similar TMAs in the cities of Glendale, Santa Monica, and Warner Center area of Los Angeles with similar considerations to membership structure, service provisions, and financial models;
- Conducted systematic review of business models and provided recommendations for TMA funding for the Sacramento Council of Governments;
- Compiled best practice research regarding TDM ordinances and programs that included funding, administration and implementation.
- Participated in ongoing industry best practice demonstrations and discussions through professional networks such as the Association of Commuter Transportation.

We also undertook a similar task for SACOG (provided as a Work Sample in Appendix A) and will bring added value to the task by building on that strong base of information.

Steer will prepare a Background Research Memo that will include summaries for each identified business model and up to three brief case studies/examples for each model. Data will be collected via phone interviews and web research.
The Memo will focus on the following TMA characteristics with respect to each of the TMA model types, and why these features work or do not work in a specific context.

- **Market Share**: Percentage of potential members or users involved in the TMA.
- **Market Segmentation**: Major TMA user groups, such as employees, students and community members and subgroups within those such as types of employees or demographics of residents, if available.
- **Geography**: Level of density and access to multi-modal options (relatively fixed to Menlo Park and Foster City).
- **Operating Budget**: Size of operating budget.
- **Funding Streams**: Way TMA is funded, such as through public funds or membership dues.
- **Organization Goals**: The ultimate mission of the TMA, such as mobility, sustainability, or benefits provisions.
- **Leadership**: The operational structure and management of the TMA.
- **Service Provision**: Levels of TOM service for each member, ranging from basic support (marketing, guaranteed ride home) to more comprehensive services such as on-demand microtransit or Maas.

**Task 2: Specific TMA Model Analyses**

Using the best practice research and the existing conditions analysis, Steer will evaluate the TMA models with respect to characteristics in Menlo Park context. The model analysis is largely an exercise at determining the optimal scale of the TMA, which will ultimately influence types and level of TOM service provided to members and target user groups.

For each model, Steer will indicate the relative benefits and risks, the effectiveness of reducing congestion and GHG emissions, and the relative alignment with and support for other TOM programs and planning activities (Safe Routes to School, Transportation Master Plan).

**Table 3.3: Sample Evaluation Matrix**

<table>
<thead>
<tr>
<th>TMA Model</th>
<th>Status Quo</th>
<th>Subregional</th>
<th>Large Employer</th>
<th>Small Employer</th>
<th>Citywide</th>
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<tr>
<td>Definition:</td>
<td>Independent TDM programs, no city investment.</td>
<td>Collaboration among several cities in the Peninsula.</td>
<td>Large employers in specific districts with existing programs.</td>
<td>Smaller employers located in the downtown core.</td>
<td>Small and large employers; potentially residents.</td>
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<td>Benefits</td>
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### Project Schedule

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EXHIBIT “B” - DISPUTE RESOLUTION

B1.0 All claims, disputes and other matters in question between the FIRST PARTY and CITY arising out of, or relating to, the contract documents or the breach thereof, shall be resolved as follows:

B2.0 Mediation
B2.1 The parties shall attempt in good faith first to mediate such dispute and use their best efforts to reach agreement on the matters in dispute. After a written demand for non-binding mediation, which shall specify in detail the facts of the dispute, and within ten (10) days from the date of delivery of the demand, the matter shall be submitted to a mutually agreeable mediator. The Mediator shall hear the matter and provide an informal opinion and advice, none of which shall be binding upon the parties, but is expected by the parties to help resolve the dispute. Said informal opinion and advice shall be submitted to the parties within twenty (20) days following written demand for mediation. The Mediator’s fee shall be shared equally by the parties. If the dispute has not been resolved, the matter shall be submitted to arbitration in accordance with Paragraph B3.1.

B3.0 Arbitration
B3.1 Any dispute between the parties that is to be resolved by arbitration as provided in Paragraph B2.1 shall be settled and decided by arbitration conducted by the American Arbitration Association in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association, as then in effect, except as provided below. Any such arbitration shall be held before three arbitrators who shall be selected by mutual agreement of the parties; if agreement is not reached on the selection of the arbitrators within fifteen (15) days, then such arbitrator(s) shall be appointed by the presiding Judge of the court of jurisdiction of the agreement.

B3.2 The provisions of the Construction Industry Arbitration Rules of the American Arbitration Association shall apply and govern such arbitration, subject, however to the following:

B3.3 Any demand for arbitration shall be writing and must be made within a reasonable time after the claim, dispute or other matter in question as arisen. In no event shall the demand for arbitration be made after the date that institution of legal or equitable proceedings based on such claim, dispute or other matter would be barred by the applicable statute of limitations.

B3.4 The arbitrator or arbitrators appointed must be former or retired judges, or attorneys at law with last ten (10) years’ experience in construction litigation.

B3.5 All proceedings involving the parties shall be reported by a certified shorthand court reporter, and written transcripts of the proceedings shall be prepared and made available to the parties.

B3.6 The arbitrator or arbitrators must be made within and provide to the parties factual findings and the reasons on which the decisions of the arbitrator or arbitrators is based.

B3.7 Final decision by the arbitrator or arbitrators must be made within ninety (90) days from the date of the arbitration proceedings are initiated.

B3.8 The prevailing party shall be awarded reasonable attorneys’ fees, expert and non-expert witness costs and expenses, and other costs and expenses incurred in connection with the arbitration, unless the arbitrator or arbitrators for good cause determine otherwise.

B3.9 Costs and fees of the arbitrator or arbitrators shall be borne by the non-prevailing party, unless the arbitrator or arbitrators for good cause determine otherwise.

B3.10 The award or decision of the arbitrator or arbitrators, which may include equitable relief, shall be final, and judgment may be entered on it in accordance with applicable law in any court having jurisdiction over the matter.