

**REQUEST FOR PROPOSAL
FOR THE FCRTA COUNTY-WIDE ELECTRIC VEHICLE CHARGING
MASTER PLAN AND ENERGY MANAGEMENT SYSTEM PLAN**

DUE Thursday, February 29, 2024 4:00 P.M. (PST)



**Fresno County Rural Transit Agency
2035 Tulare Street, Suite 201 Fresno, CA 93721
(559) 233-6789**

Additional background information on this proposal can be found on
the FCRTA website

www.ruraltransit.org

Date: January 26, 2024
REQUEST FOR PROPOSAL
FCRTA COUNTY-WIDE ELECTRIC VEHICLE CHARGING MASTER
PLAN AND ENERGY MANAGEMENT SYSTEM PLAN

Fresno County Rural Transit Agency (FCRTA) is requesting proposals from qualified consultants to conduct an analysis to develop an EV Charging Master Plan and Energy Management System Plan. The next step in FCRTA's electrification efforts is to develop a comprehensive EV charging master plan and an energy system management plan. Building on FCRTA's previous efforts, the EV charging plan will evaluate the locations that charging equipment is needed, the types of equipment, cost of the equipment, and integration with future microgrids. FCRTA has a need for an energy management system to monitor the energy needs, consumption, solar generation and storage.

Background: The Fresno County Rural Transit Agency (FCRTA) is the primary provider of public transit services in the rural areas of Fresno County including each of the thirteen (13) incorporated Cities; City of Coalinga; City of Firebaugh; City of Fowler; City of Huron; City of Kerman; City of Kingsburg; City of Mendota; City of Orange Cove; City of Parlier; City of Reedley; City of Sanger; City of San Joaquin; City of Selma. Many unincorporated rural communities are also served by FCRTA, including: Alder Springs; Auberry; Biola; Burrough Valley; Cantua Creek; Caruthers; Del Rey; Easton; El Porvenir; Five Points; Friant; Halfway; Jose Basin; Lanare; Laton; Marshall Station; Meadow Lakes; Mile High; New Auberry; O'Neill's; Prather; Raisin City; Riverdale; Sycamore; West Park; Three Rocks; Tollhouse; Tranquility; and the Native American Indian Rancherias of: Big Sandy; Cold Springs; and Table Mountain.

The FCRTA has been a leader in advancing energy efficient transportation, as it has purchased numerous zero emissions buses and installed public charging infrastructure throughout the County. FCRTA has been working on multiple aspects of reducing emissions and the transition to EVs/zero emission vehicles (ZEVs) including receipt of 31 EVs to date as well as an electrical grid analysis study funded by the FY 2019-20 Caltrans Sustainable Communities Grant to analyze the electrical grid infrastructure and prepare for charging infrastructure installation as well as a Microgrid Study that is currently underway. Although FCRTA has already begun to add EVs to the fleet, there have been many challenges associated with the deployment of EV's including the range on high-mileage rural routes, charger installation, infrastructure required, timing of charging, temperature related issues, extra staff training required and the extra costs and extra time associated with these challenges.

To support State and regional GHG reduction goals and comply with State vehicle electrification mandates, FCRTA has been a leader in electrifying their vehicle fleet, as they have purchased 33 electric vehicles (EVs) to-date and installed EV charging equipment throughout Fresno County. FCRTA has a vast service area with communities that are many miles apart from one another, and therefore needs a master plan to determine where EV charging equipment is needed for FCRTA's operations (and for partners such as other transit agencies, local governments, and the public), the types of equipment needed, cost of the equipment, electrical grid capacity, and integration with future microgrids/resiliency hubs. FCRTA has a need for an energy management system to monitor energy needs, usage, storage, and solar generation. The energy management system plan would evaluate the technology and vendors available, best-practices, system costs, and data sharing policies; and recommend the appropriate energy management system solution for FCRTA. This project will include technical analysis and stakeholder outreach, and the project would be informed by a project advisory committee consisting of state entities, regional government agencies, 13 rural Fresno County cities, unincorporated communities, local transit providers, Pacific Gas and Electric, FCRTA's transit operator, and non-profit and social services organizations. The project would be closely coordinated with local and regional efforts including FCRTA's EV microtransit planning efforts, Distributed Energy Resource/Microgrid Feasibility Study, Electrical Grid Analysis Study, EV Fleet Transition Plan/Zero-Emissions Bus Rollout Plan, zero-emission Transit Feasibility Study, as well as Fresno County of Government's EV Readiness Plan.

Objectives of the study:

FCRTA's proposed project has two components: 1) the County-wide electric vehicle (EV) charging master plan and 2) the energy management system plan. This section summarizes the objectives of the two project components separately.

The primary objective of the EV charging master plan is to facilitate FCRTA's transition to an all-EV fleet, reducing GHG emissions. Given the size of its service area, FCRTA operates out of 13 sites across the County and is partnering with unincorporated areas to store vehicles for new EV microtransit service. Range limitation has been one of the key barriers to FCRTA's fleet transition efforts. Having the correct EV charging types and locations, and understanding of each site capacity and necessary upgrades/appropriate charging infrastructure, will allow FCRTA to optimize efficiency, cost-effectiveness and transit service reliability. FCRTA also anticipates that other transit agencies and other public agencies in the County would benefit from the EV chargers, and FCRTA would engage with these entities through the project advisory committee.

Understanding the current capacity limitations of the electrical grid and high costs of electricity, the EV charging plan would also seek to reduce FCRTA's reliance on the electrical grid. Through the EV charging master plan, FCRTA would identify opportunities to install solar-powered electric vehicle charging stations, microgrids/distributed energy resources, and battery-powered energy storage.

Another key objective of the EV charging master plan is to enhance the public EV charging network in Fresno County. Fresno County lags the State average in terms of personal EV adoption, especially in rural communities. The most common reason consumers do not purchase EVs is range anxiety, because there are not enough publicly-available EV charging stations. Stakeholders, including those in underserved communities, have shown a clear need for public charging infrastructure.

The primary objective of the energy management system plan is to identify an energy management system solution that would improve the reliability and enhance the resiliency of FCRTA's transit system, FCRTA needs to monitor its overall energy needs and storage to ensure FCRTA's fleet can operate, even in the case of a power outage. It is critical for FCRTA to be able to be proactive and monitor whether certain EV charging stations need maintenance or need to be replaced to ensure FCRTA's fleet is sufficiently charged.

Another key objective of the energy management system plan is to increase efficiency, resiliency, and cost-effectiveness. The system would provide tools to manage, reduce, conserve, and optimize electricity consumption. Having one energy management system would reduce the need for FCRTA to pay duplicate fees to multiple vendors, resulting in cost savings. Also, the energy management system would save FCRTA staff time by having all pertinent information in one location.

I. SCOPE OF WORK

Please refer to Appendix A and B for the proposed scope of work and timeline as submitted to Caltrans in the grant application.

Appendix A and B should be followed in developing project tasks and the timeline for completing the tasks. Minor adjustment to the proposed scope and timeline will be accepted subject to Caltrans' approval.

II. COORDINATION

The consultant will take primary direction from the FCRTA Project Manager. It is intended that all work will be completed within twenty six months of negotiating a contract in accordance with the schedule component and that the consultant's work will begin immediately upon receiving a notice to proceed.

The selected consultant will best demonstrate the ability to deliver quality work on schedule and in a cost-effective manner, consistent with the tasks and deliverables in this RFP.

File copies of all correspondence, technical memoranda, and reports should be delivered to the FCRTA Project Manager on flash drive or electronically via email in Microsoft Word format. Ten hard copies of the final report should be made available upon completion of the project.

All data, maps and all other materials prepared or collected under this contract will become the property of FCRTA. A monthly progress report should be provided to the project manager along with the invoice. The progress report should provide information on the work that has been completed previous month, and the work expected to be conducted in the coming month. A brief summary should be provided each month reporting the progress of each task (percent completion) and whether the task is on schedule and on budget. A monthly meeting/conference call should be held between the consultant and the project manager to discuss the progress of the project and issues that need to be addressed.

III. PROPOSED TIME AND SCHEDULE

<i>Activity</i>	<i>Date</i>
Request for Proposals released	Friday, January 26, 2024
Deadline for submitting questions	Tuesday, February 6, 4:00 P.M.
Deadline for proposal submittal	Thursday, February 29, 4:00 P.M.
Oral interviews (in-person)/selection process	Week of March 4 (Tentatively)
Notice to Proceed	Week of March 28 -Subject to FCRTA Board approval and contract/agreement signing
Completion of project	April 2026

IV. PROPOSAL REQUIREMENTS

Clarity and succinctness are essential and will be considered in assessing the consultant's capabilities. Proposals that show creativity and new ideas will be highly considered. All consultant proposals submitted in response to this request will be screened by a review committee. The committee will determine, through the screening process, which consultants will be invited to make formal presentations and be interviewed by the selection committee. The selection committee reserves the right to make a final selection without an interview.

One reproducible (unbound) and five copies of the proposal plus an electronic copy on a CD or flash drive must be received at the Fresno County Rural Transit Agency by **Thursday, February 29, 4:00 P.M. local time.** Proposals not received by that date and time *will not be considered.*

In order to simplify the review process and maximize the degree of comparative analysis, the proposal should be organized in the following manner:

A. Transmittal letter

The transmittal letter should be signed by an official authorized to bind the consultant contractually and will contain a statement to the effect that the proposal is a firm offer for 90 days. The letter accompanying the proposal will also provide the following: name, title, address, and telephone number of individuals with the authority to negotiate and contractually bind the company. The transmittal shall contain a statement of understanding of the RFP.

B. Table of Contents

Include identification of the material by section and page number.

C. Overview

This section should clearly convey the consultant's understanding of the nature of the work and the general approach to be taken to its performance. This section should include, but not be limited to, a discussion of the purpose of the project, the organization of the project effort, and a summary of the proposed approach.

D. Detailed Work Plan

The prospective contractor shall provide a schedule for completing the project within the schedule set forth in this RFP. The schedule shall identify the major tasks to be undertaken and the time frame for each task. Appendix A & B should be followed in identifying the tasks and the time frame for each task. Minor adjustments to Appendix A & B will be accepted subject to Caltrans' approval.

This section should include the following components:

1. Task Description

Include a full description of each step to be followed in carrying out the project as detailed in Appendix A. Minor adjustment to the proposed scope of work in Appendix A is allowed subject to Caltrans' approval. The work description should be presented in sufficient detail (tasks, subtasks, etc.) to show a clear understanding of the work and the proposed approach.

2. Deliverables

A description of the format, content, and level of detail that can be expected for each deliverable.

3. Schedule

A schedule showing the expected sequence of tasks, subtasks, etc. should accompany the work description. Important milestones should be identified on the schedule. Minor adjustment to the proposed schedule in Appendix B is allowed subject to Caltrans' approval.

E. Management Approach

This section should describe the firm's management approach. If the proposal is a team effort, the distribution of work among the team members should be indicated. Describe the organization of the management, the structure of the work assignments, and any specific features of the management approach that require special explanation. Designate by name the project manager to be employed who will oversee the project. **No substitutions of the identified project manager will be allowed without prior approval of FCRTA.**

Include the name and qualifications of all professional personnel to be employed, a resume for each professional (included in an appendix), a statement indicating how many hours each professional will be assigned to the contract and what tasks each professional will perform.

Staffing assignments should be specific enough to demonstrate understanding of skills required and commitment of proper resources. **The selected consultant will not substitute members of the project team without prior approval of FCRTA.**

F. Budget and Billing Format

A cost analysis of the proposed budget will be done by FCRTA staff. Under various circumstances the budget could be subject to Preaudit and/or the final cost subject to Post audit by FCRTA or Caltrans division of Audits and Investigations. The allowability of individual items of cost will be determined by 48 CFR, Federal Acquisition Regulations System, Chapter 1, Part 31 et. Seq. The Contractor will also be required to comply with 49 CFR, Part 18, and Uniform Administrative Requirement for Grants and Cooperative Agreements to State and Local Governments. The contractor should have an accounting system capable of segregating direct cost from indirect costs per the above cited regulations. The Contractor and Subcontractors will comply with all applicable laws and maintain books, documents, papers, and accounting records for a period of three years from the date of the final payment.

1. Method of Payment

The cost proposal must be prepared consistent with the method of services provided under this agreement and will be reimbursed, by one of, or a combination of the methods below. The proposer must clearly state the method used to prepare the cost proposal.

- Lump Sum payment
- Actual Cost plus Fixed Fee
- Specific Rates of Compensation

Lump Sum proposals will be paid per milestone of completed work or at the end of the contract upon acceptance of the final product. Actual Cost plus Fixed Fee agreements shall be billed at actual payroll costs and include a fixed fee for profit. In agreements reimbursed by Specific Rates of Compensation, billing rates containing a component for profit will be negotiated that will not change during the term of the contract.

2. Project Budget

A maximum of \$199,500 has been budgeted for consultant services for this project.

3. Task Budget

A schedule of estimated costs to complete each task should add down to the total cost of the project (see Table 1 & 2). The task budget should include a subsidiary breakdown by task of hours and billing rate charges. To ensure a full understanding of the resources committed to the project the schedule should clearly indicate the amount of hours key personnel will be used in each task.

4. Budget and Cost Breakdown

The prospective consultant will prepare a detailed cost breakdown for the work to be performed during the project regardless of the method of reimbursement chosen. This will include all tasks required to complete the project including final reports and presentation.

a. Direct Labor Costs – A schedule of billing rates and hours worked by employee or category of employee is required of the prime contractor and all subcontractors. Billing rates shall be based on actual pay rates and should cover all costs associated with the employee (salary, benefits, and anticipated cost of living and/or merit increases during the term of the contract). Depending on the individual cost structure, overhead may be applied as a component of the billing rate or applied separately. The proposer should be prepared to validate billing rates with payroll registers, wage agreements, or other payroll documentation.

b. Overhead Rates – The overhead rate should include all indirect cost not readily assignable to cost objectives specifically benefited. Typically an overhead rate is calculated on a company or division wide basis by segregating expenses into direct cost and indirect cost categories and then dividing the indirect costs by a direct cost base such as direct labor to arrive at an overhead rate. The overhead rate is then applied on a contract by contract basis to recapture the indirect costs that are not chargeable directly to a final objective such as general and administrative, facilities, equipment, supplies, accounting, maintenance, materials, etc. Some cost structures may be broken into various overhead rates that are applied to different bases. The proposer should be prepared to provide supporting documentation such as prior agreements with government agencies or audits of prior year activities to validate overhead rates structures.

c. Direct Cost – Direct costs are those incremental costs that can be identified specifically with a particular final cost objective. Although in some instances direct cost and indirect cost may include similar categories, incremental direct cost attributable to final objectives must be separated and not included in the overhead calculation. All direct cost specifically attributed to the project and not included in the billing rates must be itemized by budget category to be eligible for reimbursement. Once contractually authorized, direct cost budgets may not be substituted without prior written consent of FCRTA.

d. Sub consultant Fees – Sub consultants must provide the same cost data detail as the prime contractor (see Table I and Table 2).

e. Fixed Fee – A fixed fee is calculated as a basis of total direct and indirect costs. The State of California allows a 10% maximum fee.

The hypothetical cost format example given below is to illustrate required components of the cost proposal only, and may have to be tailored to fit individual cost structures.

HYPOTHETICAL
COST ESTIMATE

Table 1.- Direct cost by Task

Cost Items	Task 1	Task 2	Task 3	Total
1. Direct Labor	3,700	17,053	5,502	26,255
2. Overhead (___% of Line 1)	1,480	6,821	2,201	10,502
Total Salary Burden	5,180	23,874	7,703	36,757
3. Direct Expenses				
Telephone/FAX	35	28	15	78
Postage/Shipping	12	8	35	55
Graphics/Printing	11	11	75	97
Travel	350		500	850
Misc.	45	45	45	135
Total Direct Expenses	453	92	670	1,215
4. Subconsultant Fees *	4,244	22,276	2,726	29,246
5. Fixed Fee (___% of Lines 1,2,3)	764	1,524	1,132	3,420
Total	10,640	47,766	12,231	70,638
				70,638

Table 2 - Project Task Costs by Key Personnel

Task No. and Description	Key Staff #1	Key Staff #2	Staff Support	Total Hours
Task 1. Establish Parameters	25	75		100
Task 3. Data Collection and Analysis		400	250	650
Task 4. Final Report and Presentation	15	50	175	240
Total Hours	40	525	425	990
Billing Rate	\$75.00	\$44.06	\$25.00	
Memo Total	3,000	23,132	10,625	36,757

* Subconsultants must provide required cost components found in Tables 1 & 2

G. Insurance requirements

Without limiting FCRTA's right to obtain indemnification from the consultant or any third parties, the consultant, at its sole expense, shall maintain in full force and affect the following insurance policies throughout the term of the contract:

1. Comprehensive general liability insurance with coverage of not less than \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. Comprehensive general liability insurance policies shall name FCRTA, its officers, agents, and employees, individually and collectively, as additional insured, but only insofar as the operations under the terms of the contract are concerned. Such coverage for additional insured shall apply as primary insurance or self-insurance and any other insurance, maintained by FCRTA, its officers, agents, and employees, shall be given excess only and not contributing with insurance provided under the consultant's policies herein.
2. Comprehensive automobile liability insurance with limits for bodily injury of not less than \$25,000 per person, \$250,000 per accident, and for property damages of not less than \$50,000, or such coverage with a combined single limit of \$250,000.
3. Professional liability insurance of at least \$1,000,000.
4. Worker's compensation insurance as required by law.

This insurance shall not be canceled or changed without a minimum of thirty (30) days advance written notice given to FCRTA. The consultant shall provide certification of said insurance to FCRTA within twenty-one (21) days of the date of the execution of the contract. Such certification shall show, to FCRTA's satisfaction, that such insurance coverages have been obtained and are in full force; that FCRTA, its officers, agents, and employees will not be responsible for any premiums on the policies; that as and if required such insurance names FCRTA, its officers agents, and employees individually and collectively as additional insured (comprehensive and general liability only), but only insofar as the operations under the contract are concerned; that such coverage for additional insured shall apply as primary insurance and any other insurance, or self insurance, maintained by FCRTA, its officers, agents, and employees, shall be excess only and not contributing with insurance provided under the consultant's policies herein; and that this insurance shall not be canceled or changed without a minimum of thirty (days) advance, written notice given to FCRTA.

In the event the consultant fails to keep in effect at all times insurance coverage as herein provided, FCRTA may, in addition to other remedies it may have, suspend or terminate the contract upon the occurrence of such event.

H. Disadvantaged Business Enterprise (DBE) Certification

DBE Bidders Listing (Attachment B) must be completed for all contractors and subcontractors regardless of DBE affiliation.

The FCRTA fully anticipates that it will consistently meet and exceed its adopted DBE overall goal under 49 CFR Part 26 using Race-neutral measures exclusively.

Only DBE firms currently certified per 49 CFR Part 26 will participate as DBEs in our program. Such certification must be issued by Caltrans, FHWA, FTA, DOT, MPO, City, County, or State in accordance with 49 CFR Part 26.

FCRTA will not deny award to contractors on the basis of DBE participation, who demonstrate that they have used good faith efforts to achieve DBE participation.

Contractors selected on the basis of DBE participation must provide the following information with the initial proposal or before entering into a contractual agreement with FCRTA:

1. The names and addresses of the DBE firms.
2. A description of the work each DBE will provide.
3. The dollar amount of participation by each DBE.
4. Proof of DBE certification.
5. Written confirmation that the DBE will participate.
6. If DBE participation is not achieved, evidence of good faith efforts must be provided.

Prime contractors are required to maintain records and document payments to all subcontractors for three years following the performance of the contract. These records will be made available for inspection upon request by any authorized representative on FCRTA, Caltrans, FHWA, or DOT. This reporting requirement also extends to any certified DBE subcontractor. The contractor shall maintain records showing the name and address of each subcontractor, the date of payment, and total dollar figure paid to each subcontractor.

FCRTA will safeguard from disclosure to third parties information that may reasonably be regarded as confidential business information, consistent with federal, state, or local laws.

I. Conflicts of Interest

The prospective contractor shall disclose any financial, business, or other relationship with FCRTA that may have an outcome on the selection.

J. Summary of Qualifications

Proposals shall include a summary of the firm's qualifications, including resumes of assigned staff.

K. Signing of Proposal/Authorization to Negotiate

The proposal shall be signed by an official authorized to bind the proposer and shall contain a statement to the effect that the proposal is a firm offer for a 90-day period. The proposal shall also provide the following: name, title, address, and telephone number of individuals with authority to negotiate and contractually bind the company.

L. Attachments

Attachments to be included at the end of the proposal are as follows (as attached herein):

- Attachment A: Title VI Assurance
- Attachment B: DBE Participation
- Attachment C: Budget and Cost Breakdown

V. PROPOSAL SUBMITTAL

A. Preparation of Proposal

The proposal shall be formatted in accordance with the requirements specified in *Section III: Proposal Requirements* of this RFP. Proposal forms shall be executed by an authorized signatory as described in *Section III-K: Signing of Proposal/Authorization to Negotiate*. All proposals shall be prepared by and at the expense of the proposer.

B. Examination of RFP Document

The proposer shall be solely responsible for examining, with appropriate care, the RFP, including any addenda issued during the proposal period. The proposer shall also be responsible for informing itself with respect to any and all conditions which may in any way affect the amount or nature of the proposal, or the performance of the work in the event the proposer is selected. Failure of the proposer to examine and inform itself in this manner shall be at the proposer's own risk and no relief for error or omission shall be given.

C. Submission of Proposal/Period of Acceptance

One reproducible master, an electronic file on CD/flash drive and five copies of all proposals must be delivered to FCRTA no later than **Thursday, February 29, 4:00 P.M.** Proposals will not be accepted after 4:00 P.M. PDT. Postmarks will not be accepted. Proposals should be delivered to:

Janelle Del Campo, Project Manager
Fresno County Rural Transit Agency
2035 Tulare Street, Suite 201
Fresno, CA 93721

All proposals will remain firm for a period of ninety (90) days following the final date for submission. All proposals will become the sole property of FCRTA and a part of its official records without obligation on the part of FCRTA.

This RFP is not to be construed as a contract of commitment on the part of FCRTA. FCRTA reserves the right to reject all proposals, to seek additional information from each proposer, or to issue another RFP, if deemed appropriate.

D. Modification or Withdrawal of Proposals

Any proposal received before the date and time specified above for receipt of proposals may be withdrawn or modified by written request of the proposer. To be considered, however, the modified proposal must be received by the proposal due date and time specified previously.

All verbal modifications to these conditions or provisions are ineffective for proposal evaluation purposes. Only written changes issued by proposers to FCRTA are authorized and binding.

E. Rejection of Proposals

Failure to meet the requirements for the request for proposals will be cause for rejection of the proposal. FCRTA may reject any proposal if it is conditional, incomplete, or contains irregularities or inordinately high cost rates. FCRTA may waive an immaterial deviation in a proposal. Waiver of an immaterial deviation shall in no way modify the Request for Proposals document or excuse the proposer from full compliance with the contract requirements if the proposer is awarded the contract.

VI. CONSULTANT SELECTION

All consultant proposals submitted in response to this request will be screened by a selection committee. The committee will determine, through the screening process, which consultants will be invited to make formal presentations and be interviewed in-person by the committee. **The selection committee reserves the right to make a final selection without an interview.**

The actual award of the contract will be by the FCRTA Board. Proposal opening does not constitute the awarding of a contract. The contract/agreement is not in force until it is awarded by FCRTA and executed by the FCRTA designees.

VII. PROPOSER OBJECTIONS

A proposer may object to any of the terms or provisions set forth in the RFP's Scope of Work or to the selection of a particular proposer on the grounds that FCRTA's procedures, the provisions of this RFP, or applicable provisions of federal, state, or local law have been violated or inaccurately or inappropriately applied by submitting FCRTA a written explanation of the basis for the objection. Deadlines for submittal of objections are:

- No later than two weeks prior to the date proposals are due, for objections to RFP provisions; or
- Within three working days after the date on which contract award is authorized or the date the proposer is notified that it was not selected, whichever is later, for objections to proposer selection.

If the proposer does not state any objections, FCRTA will assume that the RFP scope of services are acceptable to the proposer and have been fully factored into its response. If the proposer intends to negotiate with FCRTA concerning any part of the scope of services that the proposer finds objectionable, the proposer must provide specific language in its response that will address or cure its objections.

VIII. FCRTA Rights

FCRTA may investigate the qualifications of any proposer under consideration, require confirmation of information furnished by a proposer, and require additional evidence of qualifications to perform the work described in this RFP.

FCRTA reserves the right to:

1. Reject any or all of the proposals if it deems such action is in the public interest;
2. Issue subsequent Requests for Proposals;
3. Cancel the entire Request for Proposal;
4. Remedy technical errors in the Request for Proposals process;
5. Appoint an evaluation committee to review the proposals;
6. Seek the assistance of outside technical experts in proposal evaluation;
7. Approve or disapprove the use of particular subcontractors;
8. Establish a short list of proposers eligible for interviews after review of written proposals;
9. Negotiate with some, all, or none of the respondents to the RFP;
10. Solicit best and final offers from all or some of the proposers;
11. Award a contract to one or more proposers;

12. Accept an offer other than the lowest price offer; and
13. Waive informalities and irregularities in proposals and the bid process.

This RFP does not commit FCRTA to enter into a contract, nor does it obligate FCRTA to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. All proposals will be subject to public disclosure as required by the California Public Records Act.

FCRTA reserves the right to investigate the qualifications of all firms under consideration to confirm any part of the information furnished by a proposer, or to require other evidence of managerial, financial, or other capabilities which are considered necessary for the successful performance of the contract.

IX. RFP QUESTIONS

All questions on the RFP should be submitted in writing by Tuesday, February 6th to:

Janelle Del Campo, Project Manager
Fresno County Rural Transit Agency
2035 Tulare Street, Suite 201
Fresno, CA 93721
delcampo@fresnocog.org

All questions and answers will be posted on the FCRTA website at:
www.ruraltransit.org by Wednesday February 14th.

Attachment A

TITLE VI ASSURANCE

The Fresno County Rural Transit Agency, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d-4 and Title 49, Code of Federal Regulations, department of Transportation, Subtitle A, Office of the Secretary, Part 21 Nondiscrimination in Federally Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority businesses enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or nation origin in consideration of an award.

Attachment C

BUDGET AND COST SCHEDULE TEMPLATE

TASKS	(Name)		(Name)		(Name)		Total Task Hours	Total Task Cost
	(Role)		(Role)		(Role)			
	(Hourly Billing Rate)		(Hourly Billing Rate)		(Hourly Billing Rate)			
Task	Hours	Cost	Hours	Cost	Hours	Cost		
Tasks Subtotal								

DIRECT COSTS

Direct Cost		Amount
Direct Costs Subtotal		

SUBCONSULTANTS

Subconsultants		Total Cost
Subconsultants Subtotal		

PROPOSAL GRAND TOTAL		
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SCOPE OF WORK: FCRTA COUNTY-WIDE EV CHARGING MASTER PLAN AND ENERGY MANAGEMENT SYSTEM PLAN

Introduction

According to the American Lung Association, Fresno County has some of the worst air quality in the nation, receiving an F grade for both ozone and particle pollution. The majority (62 percent) of census tracts in the County are considered disadvantaged by SB 535 (communities in the top 25% scoring areas from CalEnviroScreen 4.0 along with other areas with high amounts of pollution and vulnerable populations – see map of disadvantaged communities in Attachment 2). Disadvantaged communities are also likely to be disproportionately impacted by the future impacts of climate change.

Fresno County has a high rate of poverty (19.5 percent) and low per capita income (\$27,295), factors that contribute toward transit dependence. Many of FCRTA's transit riders are frequent riders that rely on FCRTA's services as their primary mobility option.

These two factors make electric and zero emissions transit imperative in the County, both to improve resiliency overall, air quality and provide critical connections to jobs, healthcare, and quality of life services.

The Fresno County Rural Transit Agency (FCRTA) is applying for a Caltrans Sustainable Transportation Planning Grant to conduct a County-wide electric vehicle (EV) charging master plan and energy management system plan. As part of the grant activities, FCRTA would partner with a consultant to conduct the technical analysis and facilitate the stakeholder outreach.

The proposed project is consistent with regional planning documents including FCRTA's Short-Range Transit Plan 2022-2026, Fresno County Regional Long Range Transit Plan 2019-2050, and the Fresno region's Regional Transportation Plan/Sustainable Communities Strategy. FCRTA and the Fresno region have conducted multiple planning efforts that will directly inform the proposed project, including FCRTA's EV microtransit planning efforts, Distributed Energy Resource/Microgrid Feasibility Study, Electrical Grid Analysis Study, EV Fleet Transition Plan/Zero-Emissions Bus Rollout Plan, Zero-Emission Transit Feasibility Study (along the Golden State/Highway 99 corridor), as well as Fresno Council of Government's EV Readiness Plan.

FCRTA's EV charging master plan would evaluate where EV charging equipment is needed for FCRTA's operation, for partners' operations (such as Clovis and FAX transit and local governments), and for personal EV charging. The master plan would consider the types of equipment needed, cost of the equipment, electrical grid capacity, necessary upgrades and costs, and integration with future microgrids/resiliency hubs. The EV charging master plan will provide FCRTA a road map for charging infrastructure planning and installation.

For the EV charging master plan, the selected consultant would conduct an existing conditions assessment to review past analysis and provide any necessary additional evaluation of the current EV charging network, network gaps, FCRTA electric fleet inventory and range, electric grid assessment, and public electric charging needs. Based on the existing conditions assessment, the EV charging analysis would recommend the number of EV chargers, type of chargers (Level 1, Level 2, DC fast chargers, inductive chargers), charger locations and cost estimates. Based on the list of sites, the analysis will conduct a sites assessment and design and utility coordination of each of the potential sites. The charging study would also identify potential funding opportunities and explore potential EV charging cost and management models.

Charging needs and costs can change daily. To develop an optimal and cost-efficient charging schedule based on the charging master plan, FCRTA needs an energy management system to monitor energy needs, usage, generation and storage by site and overall. FCRTA's energy management system plan will evaluate the technology and vendors available, as well as system costs.

Similar to the EV charging master plan, the energy management system plan would begin with the consultant conducting an existing conditions assessment to identify the current and future energy and solar usage and costs, existing and projected energy needs, and existing solar management structure. FCRTA expects this existing conditions assessment would be streamlined for efficiency based on previous analysis. Based on the existing conditions assessment, the analysis would then include a review of energy management system best-practices used in other transit agencies, potential vendors, pricing structures, geographic limitations, software and training needs. The energy management system plan would include a draft request for proposals (RFP), request for qualifications (RFQ), or similar bid request, that FCRTA can use to select an energy management system once the project is complete.

The project would also include an advisory committee consisting of state entities, regional government agencies, the rural Fresno County cities, local transit providers, Pacific Gas and Electric (PG&E), and non-profit and social services organizations.

Project Stakeholders

As mentioned in the Introduction section (above), FCRTA would partner with a consultant to lead the technical analysis and stakeholder engagement for the County-wide EV charging master plan and energy management system plan. The consultant, overseen by FCRTA, would complete Task 1 Existing Conditions and Task 2 Analysis. FCRTA would have regular check-in meetings with the consultant to review project progress and would review draft deliverables prepared by the consultant as part of these tasks. To inform Task 3: Public Outreach, the consultant would conduct a detailed review of the outreach efforts to-date that will inform the study. The consultant would coordinate the Task 4: Advisory Committee Meetings, and FCRTA would help to facilitate the meetings. The consultant would complete Task 5: Draft and Final Plan, with FCRTA conducting a review of the draft and final reports.

The project advisory committee would include key project stakeholders. Anticipated advisory committee invitees include the following entities:

- State entities
 - California Public Utilities Commission
 - California Energy Commission
 - California Air Resources Board
 - Caltrans
- Regional Government Agencies
 - Fresno Council of Governments (FCOG)
 - Fresno County
 - San Joaquin Air Pollution Control District
- Cities of Selma, Parlier, Huron, Kingsburg, Firebaugh, Mendota, Kerman, San Joaquin, Coalinga, Orange Cove, Reedley, Fowler, and Sanger
- Local transit providers: Clovis Transit and Fresno Area Express
- MV Transportation (FCRTA's transit service provider)
- PG&E
- Non-profit and social services organizations
 - CRLA
 - Fresno Housing Authority
 - Proteus
 - League of Women Voters

- The LEAP Institute
- Leadership Counsel for Justice and Accountability
- Fresno EOC
- Self-Help Enterprises
- Biola Community Services District

Overall Project Objectives

FCRTA's proposed project has two components: 1) the County-wide electric vehicle (EV) charging master plan and 2) the energy management system plan. This section summarizes the objectives of the two project components separately.

The primary objective of the EV charging master plan is to facilitate FCRTA's transition to an all-EV fleet, reducing GHG emissions. Given the size of its service area, FCRTA operates out of 13 sites across the County and is partnering with unincorporated areas to store vehicles for new EV microtransit service. Range limitation has been one of the key barriers to FCRTA's fleet transition efforts. Having the correct EV charging types and locations, and understanding of each site capacity and necessary upgrades/appropriate charging infrastructure, will allow FCRTA to optimize efficiency, cost-effectiveness and transit service reliability. FCRTA also anticipates that other transit agencies and other public agencies in the County would benefit from the EV chargers, and FCRTA would engage with these entities through the project advisory committee.

Understanding the current capacity limitations of the electrical grid and high costs of electricity, the EV charging plan would also seek to reduce FCRTA's reliance on the electrical grid. Through the EV charging master plan, FCRTA would identify opportunities to install solar-powered electric vehicle charging stations, microgrids/distributed energy resources, and battery-powered energy storage.

Another key objective of the EV charging master plan is to enhance the public EV charging network in Fresno County. Fresno County lags the State average in terms of personal EV adoption, especially in rural communities. The most common reason consumers do not purchase EVs is range anxiety, because there are not enough publicly-available EV charging stations. Stakeholders, including those in underserved communities, have shown a clear need for public charging infrastructure.

The primary objective of the energy management system plan is to identify an energy management system solution that would improve the reliability and enhance the resiliency of FCRTA's transit system, FCRTA needs to monitor its overall energy needs and storage to ensure FCRTA's fleet can operate, even in the case of a power outage. It is critical for FCRTA to be able to be proactive and monitor whether certain EV charging stations need maintenance or need to be replaced to ensure FCRTA's fleet is sufficiently charged.

Another key objective of the energy management system plan is to increase efficiency, resiliency, and cost-effectiveness. The system would provide tools to manage, reduce, conserve, and optimize electricity consumption. Having one energy management system would reduce the need for FCRTA to pay duplicate fees to multiple vendors, resulting in cost savings. Also, the energy management system would save FCRTA staff time by having all pertinent information in one location.

Summary of Project Tasks

Task 01: Project Administration

Project Kick-Off Meeting

FCRTA will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and other relevant project information. A summary of the meeting will be documented through meeting minutes.

Invoicing

FCRTA will submit complete invoices packages to Caltrans district staff based on milestone completion – on a quarterly basis. Invoices can be produced monthly if requested by Caltrans staff.

Quarterly Reports

FCRTA will submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.

Task Deliverables
Kick-off meeting notes
Invoice packages
Quarterly reports

Task 02: Consultant Procurement

RFP for Consultant Services

FCRTA will complete an RFP process to select a consultant or consultant team using procedures that comply with State Contracting Manual, Chapter 5, the Local Assistance Procedures Manual, Chapter 10, and the terms of the agreement with Caltrans.

Staff Coordination

FCRTA will hold monthly virtual project team meetings with consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to these monthly project team meetings. The consultant will prepare meeting minutes from each meeting.

Task Deliverables
Copy of procurement procedures
Copy of executed consultant contract
Copies of any and all amendments to the consultant contract
Meeting notes from project kick-off and monthly consultant meetings

Task 1: Existing Conditions

Much of the existing conditions analysis has already been conducted as part of the following studies:

- FCRTA Microgrid/Distributed Energy Resource Feasibility Study (including EV Fleet Transition Plan/Bus Rollout Plan) - *In-progress*
- FCRTA Electrical Grid Analysis Study - *Completed*
- FCOG EV Readiness Plan – *Completed*

The consultant, overseen by FCRTA, will conduct a detailed review of the documents listed above, supplemented by additional research and site visits, as needed. The existing conditions analysis will include the following information:

- Existing electric vehicle EV charging stations
 - An inventory of existing and proposed EV charging stations in Fresno County by type (i.e. Level 1, Level 2, DC Fast Charging, inductive charging), ownership, network company, and which stations are available to the public.
 - An assessment of existing FCRTA EV charging stations to determine:
 - Whether the stations are functioning or need repair
 - Safety issues, operational challenges, and design issues
 - Utilization rates
 - Gaps in the charging station network
- Personal EV adoption
 - Adoption rates by location
 - Demographic and socio-economic characteristics that would inform personal EV adoption and/or barriers to EV adoption
 - Emission “hot spots” that would especially benefit from increased EV adoption and the associated reductions in emissions
 - Comparison of personal EV adoption to current charging station locations open to the public
- FCRTA fleet and transit system
 - Inventory of FCRTA's existing electric fleet (and proposed electric fleet as detailed in the EV Bus Rollout Plan)
 - A review of FCRTA's transit routes and schedule
- Current and future FCRTA energy and solar usage, and costs
 - Current FCRTA electricity usage and costs by location
 - Current FCRTA solar energy generation by location
 - Electric utility prices
 - Existing solar management structure, including required maintenance fees and data sharing practices by location
 - Future needs identified in the EV Bus Rollout Plan and the FCRTA Electrical Grid Study)
- Existing electrical grid assessment in Fresno County including:
 - Feeder analysis, demand, and forecasting
 - Solar PV connections
 - Grid constraints
 - Distribution and transmission

- Grid capacity
- Recommended grid upgrades

Task Deliverables
Summary report of existing conditions

Task 2: Analysis

The consultant, overseen by FCRTA will complete the following tasks:

Electric Vehicle Charging Master Plan

- Based on the Existing Conditions analysis, determine the charging needs by location to accommodate FCRTA and partners (such as Clovis and FAX transit, local governments, school districts and personal EV charging). Establish an EV charging master plan with the recommended number of EV chargers, type of chargers (Level 1, Level 2, DC fast chargers, inductive chargers), charger locations, and cost estimates.
 - Potential charging station locations will include FCRTA-owned sites and site-owned by entities such as the 13 rural cities, unincorporated areas, affordable housing sites, and sites owned by other public or private entities.
 - The charger types and locations will also be informed by stakeholder feedback through Task 3 Public Outreach and Task 4 Advisory Committee Meetings
 - Explore the extent to which charging equipment can be shared with other transit agencies including Clovis Transit and Fresno Area Express (FAX), local governments, school districts and the public.
- Conduct a site assessment, design and utility coordination of each of the potential sites, including:
 - Site ownership
 - Site purchase costs (if property not owned by FCRTA)
 - Site design constraints
 - Potential permitting barriers
 - Potential for local partnerships and shared resources for infrastructure operations and maintenance
 - Existing electrical infrastructure capacity
 - Proximity to FCRTA bus depots, transit routes, and transit stops
 - EV charger capacity needed at each facility to meet current and future charging needs
 - Utility coordination for grid capacity analysis
 - Recommended/required upgrades for all facilities
 - Utility-side improvements necessary
 - Other data relevant to planning additional electrical load in support of EV chargers
- Identify potential funding opportunities from federal, State, and local funding sources for the proposed EV charging stations and supporting equipment.
- Explore potential EV charging cost and management models, including charging network company-owned and operated, site host owned and operated, or hybrid models.

Energy Management System Plan

- Research best practices of up to five (5) energy management systems utilized by other transit agencies.
- Research potential energy management system vendors that have experience working with transit agencies.
- Conduct interviews with transit agencies who have implemented energy management systems and discuss successes and lessons-learned.
- Explore the fee and pricing structures used in other energy management systems.

- Evaluate the geographic coverage limits of energy management systems given FCRTA's large transit service area.
- Explore how the energy management systems would integrate with FCRTA's existing charging stations, solar infrastructure and proposed microgrid/resiliency hubs.
- Explore the software needs and staff training necessary to operate the energy management system.
- Explore the data sharing practices of energy management systems.
- Evaluate the potential energy cost savings of an energy management system.
- Draft a request for proposals (RFP), request for qualifications (RFQ), or similar bid request detailing the parameters of the energy management system that FCRTA will use to release to potential vendors.

Task Deliverables
Presentation of findings for the Electric Vehicle Charging Master Plan
Presentation of findings for the Energy Management System Plan

Task 3: Public Outreach

FCRTA is proposing a Sustainable Communities Technical project, which does not require extensive public outreach due to its technical nature. However, FCRTA has conducted a number of community outreach events to educate the public about electrification and gain input on their needs. As part of FCRTA's Distributed Energy Resource/Microgrid Feasibility Study funded by Caltrans Sustainable Communities, FCRTA is in the process of conducting a robust community engagement effort. In March 2023, FCRTA will be hosting six community pop-up events in the communities of Parlier, Firebaugh, Huron, Reedley, Fowler, and Firebaugh. Community members will be asked to perform a mapping exercise to identify popular destinations that community members visit to inform potential electric vehicle charging locations and multi-modal community resiliency hubs. Community members will also be asked to complete a survey which will ask about personal EV charging. Feedback regarding EV charging was also gathered from the public as part of the FCRTA Electrical Grid Study and the FCOG EV Readiness Plan. Additionally, FCRTA has conducted other engagement efforts in the last three years, including surveys and community/stakeholder meetings for three different microtransit studies. To maximize the efficiency of available funding, FCRTA believes the outreach efforts conducted for the Microgrid/Distributed Energy Resources project, the Electrical Grid Study, and the EV Readiness Plan will provide sufficient feedback for the project. FCRTA plans to have regular advisory committee meetings with the local incorporated and unincorporated areas in Fresno County, to get additional perspectives regarding local issues.

Summary of Previous Public Outreach

The consultant will conduct a review of previous outreach findings and summarize input from the public to inform the charging master plan.

Task Deliverables
Presentation of findings from previous outreach efforts

Task 4: Advisory Committee Meetings

Invite interested stakeholders to join an advisory committee meeting for the study. Anticipated advisory committee invitees will include the following entities:

- State entities
 - California Public Utilities Commission
 - California Energy Commission
 - California Air Resources Board
 - Caltrans
- Regional Government Agencies
 - Fresno Council of Governments (FCOG)
 - Fresno County
 - San Joaquin Air Pollution Control District
- Cities of Selma, Parlier, Huron, Kingsburg, Firebaugh, Mendota, Kerman, San Joaquin, Coalinga, Orange Cove, Reedley, Fowler, and Sanger
- Local transit providers: Clovis Transit and Fresno Area Express
- MV Transportation (FCRTA's transit service provider)
- Pacific Gas and Electric (PG&E)
- Non-profit and social services organizations
 - CRLA
 - Fresno Housing Authority
 - Proteus
 - League of Women Voters
 - The LEAP Institute
 - Leadership Counsel for Justice and Accountability
 - Fresno EOC
 - Self-Help Enterprises
 - Biola Community Services District

It is anticipated that the consultant and FCRTA will facilitate a minimum of three (3) in-person / virtual advisory committee meetings to guide the study from initiation to completion. One meeting will occur at kick-off, one meeting the consultant and FCRTA will present interim findings and gather input, and a final meeting will be scheduled to review and approve the report. Caltrans district staff will be included in the planning for the advisory committee meetings and will be invited to service on the advisory committee. Meetings will be interactive and provide opportunities for input from all attendees.

Task Deliverables
Meeting agendas for each advisory committee meeting
List of attendees and meeting minutes for each advisory committee meeting

Task 5: Draft and Final Plan

Develop Draft Reports

Based on the existing conditions analysis, review of prior technical studies, review of prior community feedback, advisory committee feedback, and analysis, the consultant will prepare a draft electric charging master plan report and draft energy management system report. The energy management system report will be accompanied by a draft request for proposals (RFP), request for qualifications (RFQ) or other bid document that FCRTA can issue to potential energy management system vendors.

FCRTA Review and Comment on Draft Reports

FCRTA staff will review the draft reports and discuss their findings, concerns, and recommendations with the consultant. The consultant will revise the draft reports based on FCRTA's comments.

Advisory Committee Meeting

The consultant and FCRTA will solicit feedback, respond to any questions and resolve any critical issues from the project advisory committee. Because the proposed project is a Sustainable Communities Technical project, FCRTA does not anticipate releasing the document to the public for comment.

Complete Final Reports

The consultant will revise the reports based on comments from the advisory committee to produce a final electric charging master plan report and final energy system management report (accompanied by final bid document that FCRTA can issue to potential energy management system vendors).

The financial contribution of the grant program will be credited on the cover of the report.

Submit Final Reports to Caltrans

All reports will be submitted to Caltrans as ADA-accessible electronic copies.

Task Deliverables
Draft electric vehicle charging master plan report
Draft energy management system report (with draft bid document)
Final electric vehicle charging master plan
Final energy management system report (with final bid document)

Task 6: Board Review/Approval

Board Review/Approval

FCRTA will present final electric vehicle charging master plan and energy management system plan at the FCRTA Board meeting, resolve any critical issues, and adopt final electric vehicle charging master plan and energy management system plan.

Implementation Next-Steps

After the conclusion of the grant period, FCRTA will take the following implementation next-steps:

- Release the bid document to potential energy management system vendors (RFP, RFQ, or other bid document)
- Pursue fundings opportunities to implement the EV charging master plan

Task Deliverables
FCRTA board agenda
FCRTA presentation materials
FCRTA board meeting minutes indicated board acceptance/approval of reports

Appendix B

California Department of Transportation
Sustainable Transportation Planning Grant Program
COST AND SCHEDULE

Grant Category	Sustainable Communities Competitive Technical
Grant Fiscal Year	FY 2023-24
Project Title	FCRTA County-wide Electric Vehicle Charging Master Plan and Energy Management System Plan
Organization (Legal name)	Fresno County Rural Transit Agency
Disclaimers	Agency commits to the Cost and Schedule below. Any changes will need to be approved by Caltrans prior to initiating any Cost and Schedule change or amendment. Use only whole dollars in the financial information fields. No rounding up or down and no cents. Use the Local Match Calculator to ensure that grant and local match amounts are correct: Local Match Calculator
Reimbursements/ Invoicing	Does your agency plan to request reimbursement for indirect costs? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, what is the estimated indirect cost rate? _____ Does your agency plan to use the Tapered Match approach for invoicing purposes? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Task #	Task Title	Grant Amount*	Estimated Local Cash Match*	Estimated Local In-Kind Match*	Estimated Total Project Cost*	FY 2023/24				FY 2024/25				FY 2025/26											
						J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F
01	Project Administration (no more than 5% of total grant funds)	\$7,040	\$960	\$0	\$8,000																				
02	Consultant Procurement	\$880	\$120	\$0	\$1,000																				
1	Existing Conditions	\$13,200	\$1,800	\$0	\$15,000																				
2	Analysis	\$115,280	\$15,720	\$0	\$131,000																				
3	Public Outreach	\$4,400	\$600	\$0	\$5,000																				
4	Advisory Committee Meetings	\$15,840	\$2,160	\$0	\$18,000																				
5	Draft and Final Plan	\$17,600	\$2,400	\$0	\$20,000																				
6	Board Review/Approval	\$1,320	\$180	\$0	\$1,500																				
Totals		\$175,560	\$23,940	\$0	\$199,500																				