



ORANGE COUNTY TRANSPORTATION AUTHORITY  
REQUEST FOR PROPOSALS 250113

# MOVE OC ACTIVE TRANSPORTATION PLAN

Proposal submitted by TDG Engineering, Inc., an affiliate of  
Toole Design Group, LLC on February 4, 2026

February 4, 2026

Orange County Transportation Authority  
Attn: Rhea Aninzo, Contract Administrator  
550 South Main Street  
Orange, CA 92863

**RE: RFP 250113—Move OC Active Transportation Plan**

Dear Rhea Aninzo and Members of the Evaluation Committee:

**Toole Design** commends OCTA for advancing a clear and timely vision for the Move OC Active Transportation Plan (Move OC) that moves beyond documenting inventory to meaningfully increasing everyday walking, biking, and rolling across Orange County. Through our ongoing partnership with OCTA and our work across the county, we understand what is animating this effort. Orange County's unique geography and context demand a plan that is ambitious and pragmatic, laying the groundwork for long-term, reliable funding. Move OC must establish clear guideposts for implementation tied to a vision of all ages and abilities while leaving room for cities to advance at different speeds. Toole Design is uniquely positioned to help OCTA deliver that outcome for the following reasons:

- 1. We bring national best practices grounded in Orange County's local context.** Project Manager **Adam Wood, AICP** leads Toole Design's Active Transportation Planning Practice and has spent two decades leading complex active transportation plans (ATPs) across the U.S. Adam serves on the Board, Executive Committee, and Policy Committee of the Association of Bicycle and Pedestrian Professionals, helping shape best practices that agencies like OCTA rely on to justify forward-looking, and sometimes difficult, policy and investment decisions. Supported by our Los Angeles-based team, we bring experience from 21 active transportation projects in Orange County, giving us a nuanced understanding of the County's geographic diversity, political dynamics, and varying levels of local readiness.

2. **We understand how to structure an effective regional, multijurisdictional plan.** Move OC must support ambitious cities such as Costa Mesa and Irvine while remaining accessible and useful to more constrained communities. Toole Design has led more than 50 regional- and county-scale ATPs, working with diverse stakeholder groups to create flexible, goal-driven frameworks. In partnership with **Cambridge Systematics**, we will bring together advanced modeling and scenario planning with OCTA's values-, goals-, objectives-, and measures-based (VGOM) framework to translate OCTA's vision into clear, defensible strategies that resonate across all four planning areas.
3. **We know how to turn plans into real-world outcomes.** Our team has designed thousands of miles of bikeways and pedestrian facilities nationwide and authored milestone guidance including the AASHTO *Guide for the Development of Bicycle Facilities, 5<sup>th</sup> Edition* and FHWA's *Achieving Multimodal Networks: Applying Design Flexibility and Reducing Conflicts*. Our work with agencies such as the City of Austin—where we support active transportation projects from long-range planning through design, implementation, and evaluation—ensures that Move OC will be grounded in what it actually takes to deliver projects and position OCTA to advance future funding, phasing, and prioritization decisions.
4. **We lead engagement that builds trust and momentum.** Toole Design staff lead inclusive, creative engagement processes across Southern California, working with youth, older adults, English Learners, and people with disabilities. Our subject matter experts engage directly with stakeholders and communities. We are not outsourcing our engagement. However, to extend our reach and cultural fluency, we are pleased to partner again with **Arellano Associates**, whose Orange County presence and trusted outreach approach will help ensure that Move OC reflects community priorities and supports broad participation.

**Adam Wood, AICP** will lead our team as Project Manager, working alongside Deputy Project Manager **Adam Russell, RSP**, who will lead day-to-day project administration support plan development. **Roger Pelayo**, Toole Design's Los Angeles Office Director and Principal-in-Charge for this project, will work closely with Adam to ensure the project is delivered on schedule and within budget. **Angie Byrne, MCHES, CPH**, Toole Design's Safety Practice Lead, and **Andy Clarke**, Toole Design's Director of Strategy, will serve as Strategic Advisors, ensuring that Move OC is effective and implementable. This leadership team will be supported by a deep bench of local planners and designers.

Toole Design acknowledges the receipt of Addenda 1 (1/13/2026), 2 (1/21/2026), and 3 (1/26/2026). Our proposal shall remain valid for a period of not less than 120 days from submittal. We appreciate the opportunity to submit this proposal for a plan that will play a pivotal role in shaping Orange County's future active transportation network and its integration with transit, micromobility, and emerging mobility hubs.

I, Jessica Fields, am authorized with contractual responsibility and attest that all information submitted within this proposal is true and correct. Toole Design is confident of our team's availability and ability to provide timely services throughout the project. Thank you for considering our team.

Sincerely,



Jessica Fields, PE, AICP

Director of Operations, Western U.S.

*Toole Design's contracting entity for California is TDG Engineering, Inc. (TDG), an affiliate of Toole Design Group, LLC. TDG has the same management as Toole Design and performs engineering work under the direction of Amalia Leighton Cody, PE, AICP who is a California-registered engineer.*

**Offeror Identification:**

TDG Engineering, Inc.

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# QUALIFICATIONS, RELATED EXPERIENCE, AND REFERENCES

# PROFILE OF FIRMS

## TOOLE DESIGN

**Year Founded:** Toole Design Group, LLC 2003 | TDG Engineering, Inc. 2020

**Form of Organization:** Toole Design Group, LLC—Limited Liability Company | TDG Engineering, Inc.—Corporation

**Number of Employees:** 353

**Number of Offices:** 22

**Office Locations:** Los Angeles, CA (Lead Office); Silver Spring, MD (Headquarters); Albuquerque, NM; Atlanta, GA; Austin, TX; Bentonville, AR; Boston, MA; Columbus, OH; Denver, CO; Hartford, CT; Kansas City, MO; Madison, WI; Minneapolis, MN; Oakland, CA; Orlando, FL; Philadelphia, PA; Pittsburgh, PA; Portland, ME; Portland, OR; Raleigh, NC; Seattle, WA; Spartanburg, SC

**DUNS Number:** 100952305 | **UEI Number:** QGWJWBM76MP5

Toole Design is the leading planning, engineering, and landscape architecture firm specializing in active transportation planning and design. Unique in the industry, every one of our projects is focused on multimodal integration to create a system where walking, biking, taking transit, and driving is safe for everyone. For 23 years, we have partnered with our clients to transform the

way people move and helped communities thrive. Toole Design staff—especially our 17-person Los Angeles team—regularly bike to work and choose to bike for other trips. We are committed to creating bicycle facilities for all ages and abilities, and designing streets and places that are safe and welcoming for pedestrians.

Our staff have assessed tens of thousands of miles of roadways throughout the U.S. to develop safer and more connected active transportation networks. In California, we have led bicycle and pedestrian plans for over 50 communities including the Carson Bicycle Plan, Glendale Bicycle Plan, the San Francisco Active Communities Plan, and the Los Angeles County Unincorporated Bike Plan. Our work with OCTA on recent projects like the E-Bike Safety Action Plan and the Orange County Bikeways Connectivity Study will support our approach to this project.

**350+**

**We have led over 350 active transportation plans in the U.S., including over 50 in California.**

Toole Design is renowned for our national design guidance, resources that are fundamentally transforming how communities build active transportation infrastructure and that uniquely inform our active transportation plans. Nationally relevant publications authored or co-authored by Toole Design include:

- *AASHTO Guide for the Development of Bicycle Facilities*—prior editions and the updated 5<sup>th</sup> edition
- *FHWA Achieving Multimodal Networks: Applying Design Flexibility and Reducing Conflicts*
- *FHWA Shared-Use Path Level of Service Calculator and Users Guide*
- *FHWA Resident's Guide for Creating Safe and Walkable Communities*

Toole Design takes our engagement practice as seriously as our technical work. For every project, we design creative and dynamic engagement techniques that ask the right questions to inform design, and that generate great event turnout. We specialize in working with disadvantaged populations. In Los Angeles County, our recent engagement successes include:

- Engaging older adults through the LADOT Safe Routes for Seniors Neighborhood Plans
- Facilitating multilingual workshops for the City of Hawaiian Gardens Bicycle Plan
- Working with schools and youth as part of the Santa Ana Bike Safety Program
- Leading over 10 community roundtables in partnership with CBOs as part of the Los Angeles County Unincorporated Bike Plan

*Toole Design's contracting entity for California is TDG Engineering, Inc. (TDG) an affiliate of Toole Design Group, LLC. TDG has the same management as Toole Design.*

## **FINANCIAL CONDITION**

Toole Design has the technical, financial, and managerial competence to fulfill the consultant requirements listed in RFP 250113—Move OC Active Transportation Plan. The firm has had over 23 years of sustained growth and has no liens, debt, or similar liabilities. Toole Design uses Deltek's Vantagepoint, a fully integrated project management and accounting software that has been set up to be FAR compliant. There are no conditions that would impede Toole Design's ability to complete the project.

## **LOBBYING ACTIVITIES**

The Toole Design Team attests that we have not hired or retained a company to provide lobbying or advocating services on behalf of the firm.

## **ARELLANO ASSOCIATES**

**Year Founded:** 1994 | **Form of Organization:** S Corporation

**Number of Employees:** 80 | **Number of Offices:** 1

**Office Locations:** Chino Hills, CA

**Contact Information:** Genoveva Arellano, 909.627.2974, garellano@arellanoassociates.com

5851 Pine Avenue, Suite A, Chino Hills, CA 91709

**DUNS Number:** 944382704 | **UEI Number:** 45-4181058

Arellano Associates (AA) is celebrating 30 years of providing communications and public outreach, community and government relations, and strategic planning and marketing programs. AA is woman-owned and minority-owned and a certified Small Business-owned (SBE) and Disadvantaged Business Enterprise (DBE). AA serves many of Southern California's most important public programs, including transportation, public safety, sustainability, planning, and infrastructure improvement. They will serve as a trusted partner to Toole Design—guiding meaningful community engagement that is intentional, equitable, and inclusive.

Toole Design and AA have an established teaming relationship with OCTA, having partnered on the Orange County Bikeways Connectivity Study and the Active Transportation Support Services On-Call. This collaboration provides OCTA with a well-coordinated team that combines complementary expertise, strong familiarity with OCTA processes, and a proven ability to deliver high-quality active transportation planning services.

In addition to our work together with OCTA, Toole Design and AA have collaborated on the Carson Bicycle Plan, Hawaiian Gardens Bicycle Plan, the Los Angeles County Unincorporated Bike Plan, and the Los Angeles Department of Transportation (LADOT) Westside Mobility Projects. This experience allows us to work efficiently from day one, reduce project risk, and deliver consistent, implementable solutions that directly support OCTA's active transportation objectives.

## **CAMBRIDGE SYSTEMATICS**

**Year Founded:** 1972 | **Form of Organization:** Corporation

**Number of Employees:** 201 | **Number of Offices:** 12

**Office Locations:** Atlanta, GA; Austin, TX; Bethesda, MD; Chicago, IL; Denver, CO; Fort Lauderdale, FL; Los Angeles, CA; Medford, MA; New York, NY; Oakland CA; Raleigh, NC; Tallahassee, FL

**Contact Information:** Sam Zneimer, 781.539.6700, szneimer@camsys.com

200 River's Edge, Suite 420, Medford, CA 02155

**DUNS Number:** 076596774 | **UEI Number:** FNXDK49XHH74

Cambridge Systematics (CS) is a nationally recognized leader in transportation planning, research, and travel demand modeling. CS specializes in collecting and assembling high-quality data and developing accurate, credible forecasts for some of the most complex and high-profile modeling efforts in the country. For more than 53 years, CS has applied rigorous yet practical analytical techniques to support objective, defensible planning and policy decisions.

CS staff comprise the largest group of transportation modelers in the industry and have contributed to—and in many cases helped develop—many of the travel demand forecasting practices in use today. CS has estimated or updated travel forecasting models in more than 75 metropolitan areas and is a leader in innovative approaches such as activity-based modeling and integrated land use and travel modeling.

CS also brings deep experience supporting agency-level strategic planning, including active transportation and sustainability initiatives, with a focus on building agile, resilient infrastructure and institutions. In Orange County, CS has provided expert modeling support for several years and has worked closely with OCTA's modeling group.

Toole Design and CS will integrate advanced modeling and scenario planning with Toole Design's VGOM framework to translate OCTA's vision into clear, defensible strategies that resonate across all four planning areas. CS will provide technical modeling expertise to support strategy development and evaluation.

Toole Design, AA, and CS have an established teaming relationship with OCTA, having partnered previously on the Active Transportation Support Services On-Call, providing a strong foundation for seamless coordination and delivery on this effort.

## FIRM EXPERIENCE

The following pages highlight the Toole Design Team's experience on projects similar to Move OC.

### OUR WORK WITH OCTA

#### ORANGE COUNTY E-BIKE SAFETY ACTION PLAN

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**Key Staff:** Adam Russell, Joanna Wang, Malia Schilling, Roger Pelayo

**Toole Design** led the development of the [E-Bike Safety Action Plan](#).

OCTA has seen the rapid adoption of e-bikes for utilitarian and recreation use countywide, as many riders take to the County's many trails, paths, and open spaces. Our work included analysis of gaps in existing resources, approaches, and strategies at the local, regional, and state level regarding e-bike safety. Toole Design convened and surveyed a multijurisdictional stakeholder committee made up of public agency staff, retailers, bike advocates, and community organizations. Community outreach and coordination with the public and a wide array of experts and practitioners, such as school administrators and local parents, were an important component of the project. The final plan included a How-To Toolkit for e-bike safety activities, policy, and programmatic recommendations to support safe e-bike usage, and implementation and evaluation metrics.



Site visit during the E-Bike Safety Action Plan.

#### ORANGE COUNTY BIKEWAYS CONNECTIVITY STUDY

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**Key Staff:** Adam Russell, Adam Wood, Erika Kulpa, Jennifer Velazquez, Jessica Harleaux, Joanna Wang, Roger Pelayo

**Toole Design** is leading a study that evaluates streets on the County's Master Plan of Arterial Highways roadway network to identify corridors with excess roadway capacity and opportunities for lane conversion to Class IV bikeways. The study analyzes how these corridors connect to key destinations within the regional bikeway network, using methods that identify areas with a high propensity for bicycle trips. The team considers constraints such as roadway volumes, number of lanes, and facility connectivity to determine appropriate corridors and facility types. Study recommendations will address gaps in the County's regional bikeway network, setting the stage for future local projects. Toole Design and **AA** are leading public outreach, regional stakeholder engagement, and demonstration events to gather insights and build community support.

## ORANGE COUNTY SAFE ROUTES TO SCHOOL ACTION PLAN

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**Key Staff:** Adam Vest

**Toole Design** developed Orange County's first-ever Safe Routes to School (SRTS) Action Plan. This effort involved a countywide stakeholder and community engagement process, working directly with school districts and schools to assess existing SRTS efforts and identify opportunities for improvement. Our team led a multi-pronged communications campaign, including website development, social media outreach, newsletters, and project updates, to ensure broad engagement. We facilitated a Stakeholder Advisory Committee, managing over 50 committee members through a participatory strategic planning process, and conducted 10 walk audits at high-priority schools to pilot the deployment of an SRTS toolkit. The Action Plan outlined key recommendations, including establishing a countywide SRTS program, fostering partnerships, cultivating a culture of safety, and securing funding for infrastructure improvements.

## CONNECT OC

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**Key Staff:** Jennifer Velazquez, Jessica Harleaux

OC Connect is a transformative active transportation project led by OCTA that converts a former Pacific Electric Railroad right-of-way into a continuous, low-stress Class I multi-use trail connecting Santa Ana and Garden Grove. The project closes a critical bikeway gap, links two downtowns, and connects to the 66-mile OC Loop, expanding regional active transportation access for approximately 650,000 residents.

**Arellano Associates** leads multilingual, equity-focused public outreach supporting environmental clearance and stakeholder coordination, with engagement tailored to California Transportation Commission Active Transportation Program criteria. Outreach combines in-person, virtual, and grassroots strategies and includes close coordination with local jurisdictions to support grant competitiveness and long-term implementation. Through joint strategy development, collaborative evaluation of community input, and ongoing coordination with OCTA and partner agencies, the team delivers community-informed outcomes that advance regional active transportation goals.

Since 2022, Toole Design and AA have continued to support OCTA through a planning on-call contract, providing technical assistance and strategic guidance to help implement the plan's recommendations and advance SRTS initiatives across the County.

# ORANGE COUNTY TRANSPORTATION ANALYSIS MODEL SOFTWARE SUPPORT

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**Key Staff:** Sean McAtee

For more than 15 years, **Cambridge Systematics** has assisted in updating, improving, and maintaining the Transportation Analysis Model (OCTAM). CS supports model validation, updates model components using new and legacy data sources, enhances the mode choice model to better represent bicycle and pedestrian travel, incorporates travel demand management (TDM) procedures, and delivers numerous user interface customizations. CS conducts training sessions, prepares model documentation and a User's Guide, and equips OCTA staff with a strong understanding of updated model implementation. CS develops dashboard functionality that provides access to key data through interactive maps, displays detailed traffic and transit assignment results, and generates Excel summary reports with key statistics and performance measures.

## PROJECTS IN OC COMMUNITIES

In addition to our work with OCTA, **Toole Design** has assisted communities within OC to advance local active transportation initiatives that support the goals and priorities of OCTA.

- **Huntington Beach Mobility Plan:** Toole Design prepared for and shaped new and traditional mobility options to meet community goals, address the mobility needs of all people who live, work, and visit Huntington Beach, integrating these with the City's sustainable transportation system.
- **Irvine Pedestrian and Bicycle Bridge Prioritization Study and Irvine Boulevard Class IV Pilot Study:** Toole Design advanced a safe, connected walking and bicycling network through these projects with the City. These efforts provided a clear, actionable roadmap—combining prioritized investments, conceptual designs, and planning-level cost estimates with a comparative evaluation of separated bikeway treatments tailored to constrained, high-speed, and transit-adjacent conditions.
- **Santa Ana Willits Safe Routes to School Program:** Toole Design led and facilitated a walk audit workshop and trained a cohort of champions prepared to coordinate walk audits in their communities in the future. Following completion of the walk audits, we used lessons learned to refine the How-To training materials, which were packaged as a guide and resource for schools and the district to support future staff training.

## PROVEN EXPERIENCE IN ORANGE COUNTY'S NEIGHBORING REGION

### LOS ANGELES COUNTY UNINCORPORATED BIKE PLAN

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**Key Staff:** Adam Russell, Adam Wood, Jennifer Velazquez, Jessica Harleaux, Joanna Wang, Lila Singer-Berk, Roger Pelayo, Wendy Phelps

**Toole Design** led the update of the County's Bicycle Plan for the County's unincorporated areas—home to more than one million residents—while also evaluating future bikeway opportunities along flood control channels. Our team led extensive, countywide engagement in partnership with community-based organizations, local jurisdictions, County departments, Supervisorial District offices, and regional and state agencies. Technical work included existing conditions and feasibility analyses, bicycle network recommendations for approximately 120 unincorporated areas, development of a dynamic cost-estimating tool, program and policy recommendations, and bicycle design guidelines, along with network prioritization, project cutsheets, and environmental review. The plan delivered a prioritized, implementable bicycle network and implementation strategy, advancing a safer, more accessible bicycling system across the County's unincorporated areas.

**AA** designed and implemented a comprehensive Public Participation Plan that supported countywide engagement while remaining responsive to local context. The approach organized outreach by Service Planning Areas and Council of Government subregions, partnered with 10 paid community-based organizations and four in-kind partners to conduct hyperlocal engagement, and delivered multilingual outreach in English and Spanish across all materials and platforms. AA used a balanced mix of in-person, virtual, and digital tools to maximize reach and accessibility. AA supported more than 30 virtual and in-person meetings and events, managed the project website and public database, operated a bilingual helpline, and synthesized thousands of public comments to inform Toole Design's planning analysis.

### ADDITIONAL LA EXPERIENCE

In addition to the Bike Plan, Toole Design has worked within Los Angeles on a variety of projects that led to implementable active transportation outcomes.



Toole Design collaborated with a CBO to lead a stakeholder bike ride to review the Los Angeles County Unincorporated Bike Plan draft bike network recommendations in East Pasadena.

- **LADOT Westside Mobility Projects:** Toole Design led an alternatives evaluation for four corridors on Los Angeles’ Westside (Council Districts 5 and 11), advancing safer east–west and north–south bicycling connections. The work combined engagement and technical analysis to refine nearly 25 miles of candidate streets into approximately 12 miles of implementable bicycle routes.

Final recommendations balanced safety for vulnerable users with complex political and operational constraints, delivering a mix of Class IV protected bike lanes, bicycle boulevards, protected intersections, floating bus islands, and signal upgrades.

- **LADOT Safe Routes for Seniors Neighborhood Plans:** Toole Design led a three-year community engagement and planning initiative, piloting Safe Routes for Seniors plans in five Los Angeles neighborhoods. The effort focused on addressing the mobility and safety needs of older adults through targeted street and sidewalk improvements along routes to key destinations identified by residents. Toole Design developed a toolkit and neighborhood-specific engagement strategies that empowered older adults to shape the plans and supported implementation through final plan presentations and community events.



Malia Schilling leads a walking tour during a Community Leadership Committee meeting in a neighborhood of Los Angeles.

## EXPERIENCE DELIVERING PROJECTS OF SIMILAR SCALE AND COMPLEXITY

### AUSTIN URBAN TRAILS AND SIDEWALK PLANS

**Key Staff:** Adam Wood, Theja Putta, Wendy Phelps

**Toole Design** simultaneously updated Austin’s Urban Trails Plan, upgrading the City’s existing Sidewalks Plan into a comprehensive Pedestrian Plan, and providing outreach and analytical services to support the City’s internal update of its Bicycle Plan. Toole Design guided the City in developing a Shared Streets program and designed multiple permanent Shared Streets pilot projects, which have been implemented by the City.

Key elements included:

- Equity scan (reviewing plans and policies and interviewing dozens of stakeholders to understand inequities) and equity framework (acknowledgment of inequities, principles and goals for future actions, recommendations for engagement, and a platform for evaluating planning and design decisions)

- Extensive GIS data creation and analysis, including the development of eight distinct GIS-based tools usable by City staff to identify gaps, evaluate network connectivity, and prioritize projects
- Robust public engagement, designed and led by Toole Design
- Case studies of national best practices in trail corridor identification and developing; maintenance plan for urban trails; updates to the trail network plan; extensive design guidance, including placemaking elements; feasibility studies and assessments for priority trail corridors
- Development and implementation of a methodology for identifying and evaluating all marked and unmarked pedestrian crossings, identifying and classifying gaps, and prioritizing gaps for improvement

## **SAN FRANCISCO ACTIVE COMMUNITIES PLAN**

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**Key Staff:** Adam Wood, Joanna Wang, Malia Schilling, Teresa Chang, Theja Putta

**Toole Design** collaborated with the San Francisco Municipal Transportation Agency (SFMTA) on this plan, which updated the City's bikeway network and established policies, programs, and recommendations to expand safe, comfortable access for people biking and using mobility devices. The plan paired in-depth technical analysis with targeted engagement in priority communities to identify improvements that encourage active transportation. Toole Design developed an innovative Bicycle Comfort Index (BCI) that incorporated traffic conditions, land use context, pavement quality, elevation, and curbside activity to holistically measure bicyclist comfort. The BCI was used to guide network development and prioritization decisions.

## **SAN LUIS OBISPO TRAVEL MODEL SUPPORT**

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**Key Staff:** Sean McAtee

**CS** developed, updated, and applied the Citywide Travel Model, which features robust non-motorized capabilities, especially with respect to bicycle travel. The model includes bicycle facilities in the transportation networks and was calibrated using a synthesized dataset generated from Strava Metro data and bicycle counts. The model was estimated and calibrated using household travel survey data to develop locally specific trip generation and distribution models. The model is based on land use and transportation network data consistent with the City's geographic information system.

## ADDITIONAL ACTIVE TRANSPORTATION EXPERIENCE IN CALIFORNIA

### HAWAIIAN GARDENS BICYCLE PLAN

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**Key Staff:** Adam Russell, Adam Wood, Jennifer Velazquez, Jessica Harleaux, Joanna Wang, Kyle McGowan, Lila Singer-Berk, Roger Pelayo, Teresa Chang

**Toole Design** has developed the City of Hawaiian Gardens' first Bicycle Plan to guide the development of a comprehensive bicycle network in the City. The plan has established a long-range vision to create a safe and connected bicycle network both to regional destinations. Toole Design guided the City on how to enhance current facilities and how to develop new, low-stress routes that can serve people of all ages and abilities. Toole Design led the plan development through a combination of data analysis and community input.

A Community Advisory Committee consisting of established community stakeholders helped to guide the goals and vision of the plan, as well as the development of the planned bicycle network.

Toole Design and **AA** gathered feedback from the public through a series of pop-up events, roundtable meetings, business door knocking, and surveys. Our team paired this input with a thorough existing conditions analysis to develop the planned network in the Bicycle Plan. The final Bicycle Plan included a prioritized list of bicycle facilities, an action plan to guide implementation, a discussion of bicycle-supportive programs and policies, and conceptual cross-sections and cost considerations for select corridors.

### SANTA CRUZ ACTIVE TRANSPORTATION PLAN AND SAFETY ACTION PLAN

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**Key Staff:** Adam Wood, Joanna Wang, Malia Schilling, Teresa Chang, Theja Putta, Wendy Phelps

**Toole Design** is supporting the City with an update to their 2017 ATP, integrating the development of the City's first Safety Action Plan (SAP) and the design of active transportation safety demonstration projects. These coordinated efforts respond to the overrepresentation of bicyclist and pedestrian fatalities in Santa Cruz.

The ATP update emphasizes community-driven planning to improve walking and bicycling conditions citywide. Engagement began with pop-up outreach at family-focused library events, food distribution sites, and along a popular rail trail to understand residents' experiences walking and biking in Santa Cruz.

Input from pop-ups, an interactive online map, and coordination with City staff and stakeholders informs the ATP's recommended project list, policies, and programs, including a commitment that new and upgraded bicycle facilities serve all ages and abilities. Toole Design is advancing ATP priorities through safety analysis and demonstration projects.

This work includes analyzing five years of crash data, developing an interactive dashboard to support data-driven decision-making, and leading multi-day stakeholder workshops focused on active transportation safety challenges such as nighttime crashes, bikeway separation on arterials, and traffic calming on residential streets. Toole Design is assessing and scoping near-term demonstration projects that can be delivered with existing funding while identifying future ATP-ready projects for competitive grant applications.

## **CARSON BICYCLE PLAN**

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**Key Staff:** Adam Russell, Adam Vest, Adam Wood, Erika Kulpa, Jennifer Velazquez, Jessica Harleaux, Joanna Wang, Kyle McGowan, Lila Singer-Berk, Roger Pelayo

**Toole Design** and **AA** are developing a community-informed, action-oriented bicycle plan to improve bicycle infrastructure and access across Carson. Building on the recently completed Carson Active Transportation and Connectivity Plan (CATCP), the project advances seven near-term bikeway corridors for implementation by 2030. The plan evaluates existing streets and trails to identify near-term opportunities that improve safety, connectivity, and comfort while fostering a stronger bicycle culture.

The work integrates stakeholder and community engagement with policy and infrastructure analysis and concept design, resulting in a data-informed framework that guides future bike network development. The plan delivers a feasible, implementable network supported by a clear roadmap, along with grant-ready concept designs that include cost estimates, graphics, and engagement documentation aligned with Active Transportation Program requirements.

## REFERENCES

Toole Design is proud of the work we have done across the U.S.

Please contact our references below to learn about their experience working with us.

### City of Carson

Ian Holst, Associate Civil Engineer

701 E. Carson Street, Carson, CA 90745

310.847.3539 | [iholst@carsonca.gov](mailto:iholst@carsonca.gov)

### Los Angeles County Public Works

Matthew Dubiel, Principal Engineer

900 S. Fremont Avenue, Alhambra, CA 91803

626.701.7940 | [mdubiel@pw.lacounty.gov](mailto:mdubiel@pw.lacounty.gov)

### City of Austin

John Eastman, Sidewalks and Special Projects Division Manager

P.O. Box 1088, Austin, TX 78767

512.974.7056 | [john.eastman@austintexas.gov](mailto:john.eastman@austintexas.gov)

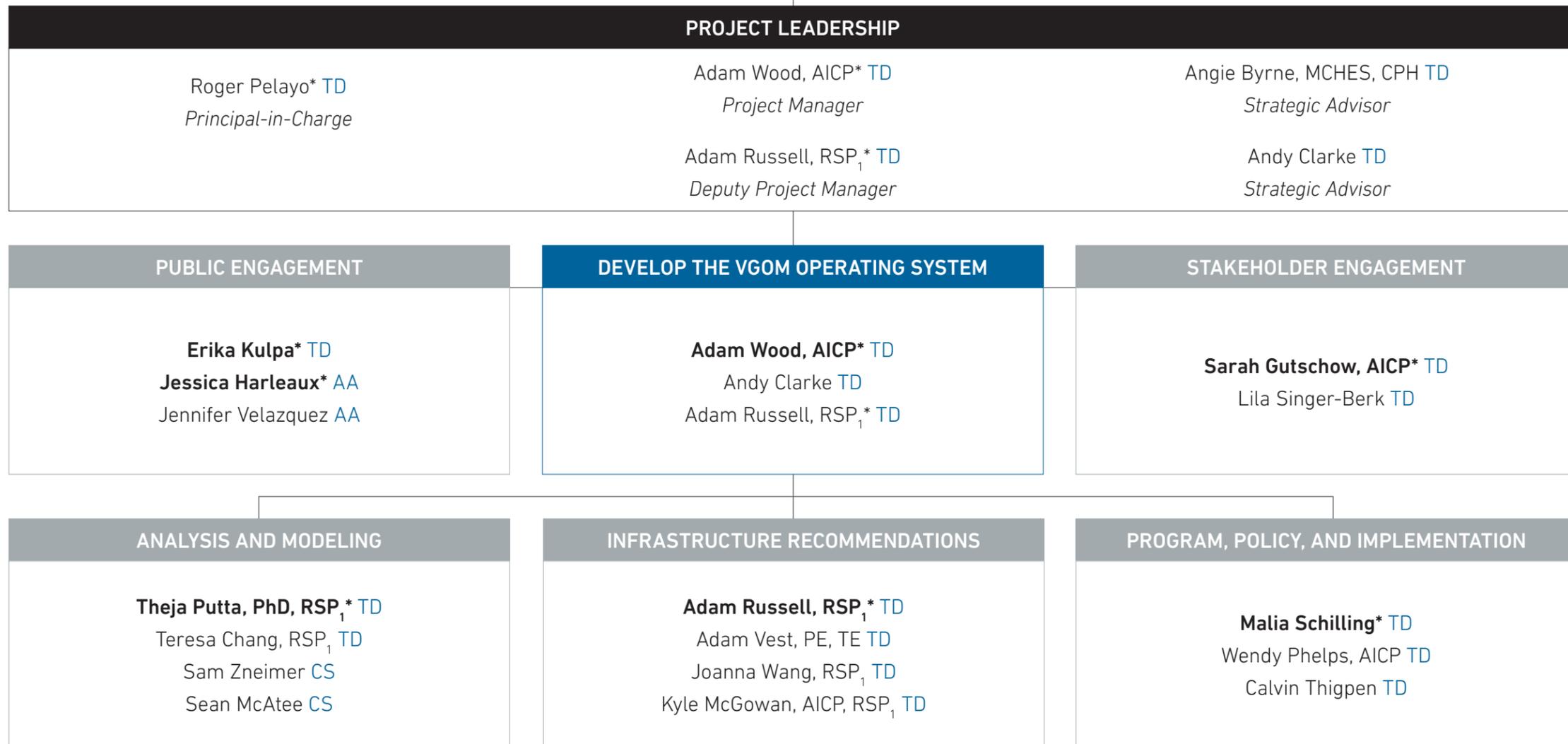




# PROPOSED STAFFING AND PROJECT ORGANIZATION

# ORGANIZATION CHART

The organizational chart below identifies our plan for staffing this project. Key personnel will be available to the extent proposed for the duration of the project. Task leads are listed in **bold**. No staff member designated as key (marked with an asterisk below) to the project shall be removed or replaced without the prior written concurrence of OCTA. TD indicates Toole Design staff, CS designates Cambridge Systematics staff, and AA designates Arellano Associates staff.



## KEY PERSONNEL AVAILABILITY

We have identified our key personnel below along with their location, current workload, availability for this project, and years of experience at their current firm. Resumes for key personnel begin on page 14 along with bios for additional project staff. **TD** indicates Toole Design staff and **AA** designates Arellano Associates staff.

Staff Name	Proposed Position	Current Location	Years at Firm	Current Assignment and Level of Commitment	Availability
Adam Wood, AICP <b>TD</b>	Project Manager; Develop the VGOM Operating System Lead	Madison, WI	13	Madison Pedestrian Plan and AAA Bike Network (15%); Nebraska DOT Complete Streets Implementation (10%); Carson Bicycle Plan (10%)	65%
Roger Pelayo <b>TD</b>	Principal-in-Charge	Los Angeles, CA	5	Carson Bicycle Plan (25%); Los Angeles County Unincorporated Bike Plan (15%); Visalia Active Transportation Plan (10%)	55%
Adam Russell, AICP, RSP <sub>1</sub> <b>TD</b>	Deputy Project Manager; Infrastructure Recommendations Lead	Los Angeles, CA	4	OC Bikeways Connectivity Study (25%); TxDOT Atlanta District Bike Plan (10%); SBCCOG Carson to the Sea Study (10%)	65%
Erika Kulpa <b>TD</b>	Public Engagement Lead	Los Angeles, CA	1	Madera Safe Routes to School Plan (25%); Lomita Local Travel Network (25%); Los Angeles County Safe Routes to School (10%)	40%
Sara Gutschow, AICP <b>TD</b>	Stakeholder Engagement Lead	Seattle, WA	2	Washington State DOT Active Transportation Augmentation Services (20%); Sandy Williams Connecting Communities Program (15%); Portland Avenue Vision Zero Improvements (5%)	60%
Malia Schilling <b>TD</b>	Program, Policy, and Implementation Lead	Los Angeles, CA	6	Sacramento Area Council of Governments Mobility Zones (15%); South Bay Cities Local Travel Network (15%); Spokane Five-Mile Mobility Hub Design (15%)	55%
Theja Putta, PhD, RSP <sub>1</sub> <b>TD</b>	Analysis and Modeling Lead	Denver, CO	5	New York State DOT Statewide ATP (15%); NCHRP 08-165 Active Transportation Data in Decision-Making (20%); Safe Streets Priority Finder (20%); NCHRP 08-165 (15%)	50%
Jessica Harleaux <b>AA</b>	Public Engagement Lead	Chino Hills, CA	4	Orange County General Plan Update (25%); Riverside General Plan Update and Climate Action Adaptation Plan (25%); CVAG Regional VMT (25%)	25%



## **ADAM WOOD, AICP**

**PROJECT MANAGER | TOOLE DESIGN**

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**Years of Experience: 21 | Master of Science, Community and Regional Planning**

**Bachelor of Arts, Geography | American Institute of Certified Planners**

**Board Member and Secretary of the Association of Pedestrian and Bicycle Professionals**

Adam is a Principal Planner and Toole Design's national Active Transportation Planning Practice Lead with expertise in active transportation planning and helping communities change their transportation paradigms. Adam has worked with more than 50 clients across the U.S., developing plans and strategies to increase the mode share, safety, and equity of biking and walking. Adam helps develop and hone our methods and serves as a sounding board and strategist to planners around the company. He excels at translating community values into actionable policy and program strategies; leading the development of street design decision-making processes and design guides; and planning local, regional, and statewide bicycle and pedestrian transportation systems.

### **SELECTED PROJECT EXPERIENCE**

#### **Austin Urban Trails and Sidewalk Plans, Austin, TX**

Adam was the Project Manager for this complex planning process that updated Austin's Urban Trails and Sidewalks Plans. He oversaw the development of the project's equity framework, creation of advanced GIS datasets and prioritization tools, and implementation of an extensive outreach strategy centered on historically underrepresented communities. Adam guided the creation of the City's Shared Streets framework and delivered multiple permanent Shared Streets designs. He coordinated cross-departmental decision-making and led a large interdisciplinary team, including five subconsultants, to deliver high-impact, citywide mobility plans.

#### **Orange County Bikeway Connectivity Study, Orange County, CA**

Adam serves as the Principal-in-Charge and Senior Advisor for this data-driven study that evaluates the County's arterial roadway network to identify opportunities for potential lane conversion to Class IV Separated Bike Lanes. Adam provides strategic guidance, QA/QC reviews, and project oversight.

## **ADAM WOOD, AICP**

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### **PROJECT MANAGER | TOOLE DESIGN**

#### **Los Angeles County Unincorporated Bike Plan, Los Angeles, CA**

Adam is serving as a Senior Advisor for this project, which entails developing a bicycle plan for the unincorporated areas of Los Angeles County. He is helping shape the high-level strategy for identifying thousands of miles of planned bikeways, evaluating feasibility across the network, and reviewing and refining bikeway recommendations.

#### **San Francisco Active Communities Plan, San Francisco, CA**

Adam was a Technical Advisor for this project, which functions as the citywide bicycle and micromobility plan. Adam provided strategic guidance to the client and consultant project team on bike network evaluation, planning, and decision making. Adam helped create a customized Bicycle Comfort Index (which expands upon the Level of Traffic Stress model) and design an analytical process to create a segment-level inventory of network needs.

#### **Better Bike Plan 2025, San Jose, CA**

Adam served as a Senior Planner on this project to help San Jose achieve ambitious goals, including a 15% bicycle mode share, Vision Zero (the elimination of traffic fatalities), and equity in bicycling. Adam's role was to oversee the policy element of this project, including a detailed best practices review to identify strategies from cities around the world that have made significant progress in increasing mode share, safety, and equity. Building upon this research and analysis, Adam identified opportunities for San Jose to use these successful strategies through targeted policy recommendations for the City and its partner organizations.

#### **Pedestrian Plan and All Ages and Abilities Bike Network, Madison, WI**

Adam serves as the Project Manager for this project, which includes the creation of Madison's first Pedestrian Plan in three decades, and developing and prioritizing the City's All Ages and Abilities Bike Network. Adam is overseeing all aspects of the project, bringing his national expertise in active transportation planning, accessibility, and equity-centered engagement to one of the most active walking and biking cities in the Midwest.



## **ROGER PELAYO**

**PRINCIPAL-IN-CHARGE | TOOLE DESIGN**

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**Years of Experience: 19 | Bachelor of Science, Urban and Regional Planning (Minor in GIS)**

Roger is a Principal Planner specializing in sustainable transportation and its relationship to urban form, inclusive of pedestrian/bicyclist behavior, access to schools and transit. He has overseen technical teams in the preparation of various transportation planning studies, including Safe Routes to School and ATPs; traffic impact studies and benefit-cost analysis for prioritization of capital projects; tactical urbanism demonstration projects; first-/last-mile and Complete Streets projects; circulation elements for general plans, community plans and mobility studies at neighborhood and community scales.

### **SELECTED PROJECT EXPERIENCE**

#### **OCTA Active Transportation Support Services On-Call, Orange County, CA**

Roger, as Principal-in-Charge, oversaw Toole Design's technical and strategic support for OCTA's active transportation goals. Leading a team of six subconsultants (including AA), services included comprehensive assessments, project planning, graphical design, and technical expertise for safe e-bike operations and Safe Routes to School plans. Additionally, he provided strategic support to partner agencies during the ATP Cycle 6 and an application visioning workshop for Cycle 7 pursuits.

#### **Orange County E-Bike Safety Action Plan, Orange County, CA**

Roger, as Principal-in-Charge, oversaw the Toole Design Team to enhance e-bike safety through strategic outreach, education, data collection, and funding. Toole Design analyzed e-bike regulations, conducted outreach activities like e-bike rodeos and workshops, and developed policy recommendations to improve safety and close existing data gaps.

#### **Los Angeles County Unincorporated Bike Plan, Los Angeles, CA**

Roger is serving as Project Manager and leading a team of consultants updating the Bike Plan. The work includes feasibility analysis of the previous plan, bicycle Level of Traffic Stress and collision analysis, development of bicycle design guidelines, equity analysis, robust community engagement with community-based organization involvement, and preparation of project cut sheets for up to 15 priority projects.

# ROGER PELAYO

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## PRINCIPAL-IN-CHARGE | TOOLE DESIGN

### **Hawaiian Gardens Bicycle Plan**, Hawaiian Gardens, CA

As Principal-in-Charge, Roger lead the development of the City of Hawaiian Gardens' first Bicycle Plan, overseeing all aspects of the project to enhance bicycle safety and mobility. Roger directed a collaborative team to assess current streets and pathways, identify design improvements, and ensure the plan integrates with neighboring cities for improved connectivity. He worked alongside the City to prioritize future enhancements, ensuring the plan serves as a strategic, long-term roadmap for the City's bicycle infrastructure development over the next decade.

### **Glendale Bicycle Plan**, Glendale, CA

As Principal-in-Charge, Roger oversaw the team supporting the development of the Bicycle Plan, outlining bicycle improvements for the next 20 years. The team conducted safety and connectivity analyses to identify key streets for new facilities, enhancing regional and local connectivity. They are also providing cost estimation and prioritization support for implementation and funding pursuits.

### **LADOT Westside Mobility Projects**, Los Angeles, CA

As Principal-in-Charge, Roger oversaw the alternatives evaluation for four corridors on Los Angeles's Westside, enhancing east-west and north-south bicycling. The project involved community engagement, existing conditions analysis, conceptual design, and 30% design plans.

### **Irvine Boulevard Class IV Pilot Study Report and Irvine Pedestrian and Bicycle Bridge Prioritization Study**, Irvine, CA

As Principal-in-Charge, Roger led Toole Design in providing alternate transportation assessments for Irvine, including the evaluation of innovative separated bikeway treatments on Irvine Boulevard and supported the team in providing alternate transportation assessments for Irvine.

### **LADOT Safe Routes for Seniors Neighborhood Plans**, Los Angeles, CA

Roger served as Principal-in-Charge to develop Safe Routes for Seniors plans in five Los Angeles neighborhoods. The project focused on improving safety, mobility, and access for older adults.



**ADAM RUSSELL, RSP<sub>1</sub>**  
**DEPUTY PROJECT MANAGER | TOOLE DESIGN**

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Years of Experience: 14 | Master of Urban and Regional Planning,

Bachelor of Arts, Environmental Analysis-Policy Concentration | Road Safety Professional 1

Adam is a transportation planner with experience in plan development, new mobility modes, safety planning, and community outreach. He has contributed to a number of ATPs and policies, addressing issues relating to bikeshare, emerging mobility modes, and bicycle network planning. Adam's work centers on equitable public engagement, traffic safety analysis, and community-driven urban design.

**SELECTED PROJECT EXPERIENCE**

**OCTA Active Transportation Support Services On-Call, Orange County, CA**

Adam worked to develop technical guidance materials and organize a webinar to provide support to Orange County cities seeking to apply for California Active Transportation Program grants. The guidance included memos and a checklist that highlighted key aspects of projects likely to score well and meet grant requirements. Adam also supported follow-up consultations with several cities' staff to discuss how to strengthen potential and ongoing ATP applications.

**Orange County E-Bike Safety Action Plan, Orange County, CA**

Adam provided planning and research support for this plan, which identifies policy and programmatic actions OCTA can take to encourage and foster safe e-bike trips throughout Orange County. The plan analyzed existing gaps in educational and consumer resources, school policies, available ridership and safety data, and jurisdictional policies and ordinances to better understand steps the agency can take to support e-bike ridership.

**Orange County Bikeway Connectivity Study, Orange County, CA**

As Deputy Project Manager, Adam coordinates multiple ongoing tasks of the Bikeway Connectivity Study, which seeks to identify roadways on OCTA's Master Plan of Arterial Highways network with excess capacity that may be re-purposed for separated bikeways. The project brings together data analysis and

## **ADAM RUSSELL, RSP<sub>1</sub>**

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### **DEPUTY PROJECT MANAGER | TOOLE DESIGN**

policy recommendations to propose new processes that encourage development and planning of bikeway connections throughout the county. Adam also assists in coordinating temporary demonstration events, which highlight for residents how separated bikeways can work on streets near them.

#### **Los Angeles County Unincorporated Bike Plan, Los Angeles, CA**

Adam is serving as Project Coordinator for the Bicycle Plan, working with the County and consultant teams to coordinate and advance the countywide planning process. He supports existing conditions analysis by evaluating data needs and analytical approaches to inform plan recommendations and helps develop and refine bicycle facility recommendations for neighborhoods throughout the County. The plan proposes bicycle facilities that address a wide range of contexts and needs.

#### **Glendale Bicycle Plan, Glendale, CA**

Adam served as Project Manager for the Toole Design's work in the Glendale Bicycle Plan. Adam coordinated data needs and analyses for bicycling safety, connectivity, and trip demand, and led the team's plan development process to generate bike facility recommendations and the associated project prioritization.

#### **LADOT Westside Mobility Projects, Los Angeles, CA**

Adam worked with LADOT in support of a series of low-stress neighborhood bicycling corridors that connected key local destinations on the city's west side. Adam supported the existing conditions evaluations of safety and feasibility, and integrated community feedback to identify routes and recommendations that created comfortable bike boulevard routes.

#### **LADOT Safe Routes for Seniors Neighborhood Plans, Los Angeles, CA**

Adam contributed to the development of five neighborhood-level plans for the Safe Routes for Seniors project, which focused on improving connections between older Angelenos and neighborhood destinations. He worked with community leadership committees and conducted outreach to local senior centers, helping lead the development of recommendations that addressed transportation access and safety needs specific to older adults.



**ANGIE BYRNE, MCHES, CPH**  
**STRATEGIC ADVISOR | TOOLE DESIGN**

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Years of Experience: 19 | Master of Public Health | Bachelor of Arts, Political Science  
Master Certified Health Education Specialist | Certified Public Health

Angie is Toole Design's Safety Practice Lead and has a passion for integrating systems approaches and public health into transportation safety. Prior to joining Toole Design, Angie spent 18 years at the USDOT, where she played a critical role in developing the **National Roadway Safety Strategy** and operationalizing the **Safe Streets and Roads for All Grant Program**. During her time at USDOT, she worked with and across multiple modal administrations, primarily with federal grant programs, specializing in identifying how to utilize multidisciplinary approaches to addressing safety challenges.



**ANDY CLARKE**  
**STRATEGIC ADVISOR | TOOLE DESIGN**

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Years of Experience: 41 | Bachelor of Laws

Andy has extensive experience promoting active transportation as a consultant, trainer, advocate, and policy analyst. Andy has held leadership positions in a number of national organizations, including serving as the President of the League American Bicyclists, the first Executive Director of the Association of Pedestrian and Bicycle Professionals, a Vice President with the Rails-to-Trails Conservancy, and the Deputy Director of the National Center for Bicycling and Walking. He has local and national experience on similarly sized, relevant efforts, including the **Long Beach Systemic Safety Analysis Report and Vision Zero Action Plan** and the **Maricopa Association of Governments, AZ Active Transportation Plan**.



**MALIA SCHILLING**  
**SENIOR PLANNER | TOOLE DESIGN**

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Years of Experience: 13 | Master of Urban and Regional Planning  
Bachelor of Arts, Public Relations and Graphic Design

Malia is a Senior Planner with experience supporting active transportation programs, policies, and implementation efforts, including bicycle and pedestrian initiatives and new mobility planning. Her background informs an equity-centered approach to developing and delivering inclusive programs and policies that improve access to safe, comfortable transportation. Malia has supported program delivery, policy development, and on-the-ground implementation for efforts such as the **Orange County E-Bike Safety Action Plan** and **OCTA Active Transportation Support Services On-Call**.



## WENDY PHELPS, AICP

**PROGRAM, POLICY, AND IMPLEMENTATION LEAD | TOOLE DESIGN**

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Years of Experience: 14 | Master of Urban and Environmental Planning  
Bachelor of Arts, Environmental Studies | American Institute of Certified Planners

Wendy is a Senior Planner with extensive experience leading active transportation programs and policy initiatives from planning through implementation. Her expertise includes Safe Routes to School programming, bicycle and pedestrian planning, public involvement, and coordination with designers and engineers to deliver facilities that improve safety and comfort for all users. Wendy has supported program- and policy-driven efforts such as the **Los Angeles County Unincorporated Bike Plan**, **LADOT Safe Routes for Seniors Neighborhood Plans**, and the **Orange County Safe Routes to School Action Plan**, bringing creativity, clear communication, and strong graphic design skills to support effective implementation.



## ERIKA KULPA

**PUBLIC ENGAGEMENT LEAD | TOOLE DESIGN**

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Years of Experience: 14 | Master of Science, Transport and City Planning  
Bachelor of Architecture

Erika is a Senior Planner with experience in active transportation, road safety, and gender equity. She likes applying her graphic design skills and wayfinding knowledge to transportation projects. Erika's overall aim is to bring people back into the center of projects and policies and help improve their everyday lives. Erika has supported various counties with public engagement through the **Los Angeles County Safe Routes to School Plan** and **Fresno County Safe Routes to School Plan**.



## SARAH GUTSCHOW, AICP

**STAKEHOLDER ENGAGEMENT LEAD | TOOLE DESIGN**

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Years of Experience: 14 | Master of City and Regional Planning  
Bachelor of Arts, Anthropology | American Institute of Certified Planners

Sarah is a Senior Planner with experience in active transportation planning and stakeholder engagement, including work on statewide, regional, and local bicycle and pedestrian initiatives such as the **Washington State DOT Active Transportation Assistance Program** and the **Yakima, WA COG/MPO Regional Safety Plan**. Prior to joining Toole Design, Sarah worked for the Puget Sound Regional Council where she led multiple ATP efforts, managed Transportation Alternatives funding distribution, and engaged with diverse local agency stakeholders to increase alignment and collaboration in active transportation implementation.



## LILA SINGER-BERK

SENIOR PLANNER | **TOOLE DESIGN**

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Years of Experience: 10 | Master of Urban Planning  
Bachelor of Arts, Urban and Environmental Policy

Lila is a Senior Planner with private-sector and research experience focused on active transportation planning, policy, and implementation. She specializes in bicycle and pedestrian planning, performance management, and public engagement, and has supported clients across California on efforts such as the **Los Angeles County Unincorporated Bike Plan**, **Hawaiian Gardens Bicycle Plan**, and the **Santa Ana Willits Safe Routes to School Program**, leading and supporting inclusive stakeholder engagement with community members, agency partners, and local organizations.



## THEJA PUTTA, PHD, RSP<sub>1</sub>

ANALYSIS AND MODELING LEAD | **TOOLE DESIGN**

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Years of Experience: 13 | Doctor of Philosophy, Civil Engineering,  
Bachelor of Technology, Civil Engineering | Road Safety Professional 1

Theja is a Senior Analyst specializing in GIS-based methods and Level of Traffic Stress analysis to support bicycle and pedestrian network planning. He applies advanced spatial analysis and mapping to help agencies identify, evaluate, and prioritize low-stress active transportation networks, and contributed this expertise to projects such as the **Austin Urban Trails and Sidewalk Plans** and **Los Angeles County Unincorporated Bike Plan**. Theja was on the team that developed the **Safer Streets Priority Finder**, an open-source tool that estimates crash risk and societal cost on street segments to support data-driven street safety decisions by practitioners and policymakers nationwide.



## ADAM VEST, PE, TE

PRINCIPAL ENGINEER | **TOOLE DESIGN**

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Years of Experience: 22 | Master of Science, Civil Engineering | Bachelor of Science,  
Civil Engineering | Professional Engineer: FL, MD, PA, VA | Traffic Engineer: CA

Adam has led complex transportation planning and engineering projects across the U.S., applying a human-scaled, Complete Streets approach that prioritizes active transportation, safety, and multimodal connectivity. His experience includes leading efforts such as the **Huntington Beach Mobility Plan** and the **LADOT Westside Mobility Projects**, where he developed innovative, context-sensitive solutions and effectively communicated project impacts and design trade-offs to community members, agency partners, and key stakeholders.



**JOANNA WANG, RSP<sub>1</sub>**  
**PROJECT PLANNER | TOOLE DESIGN**

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Years of Experience: 8 | Master of City Planning  
Bachelor of Science, GeoDesign, Minor in Economics | Road Safety Professional 1

Joanna is an Analyst and Planner with experience supporting active transportation planning through GIS scripting, crash and safety analysis, and multimodal corridor studies. She has led technical tasks such as collision data analysis, participatory mapping, graphic design, and data visualization, developing intuitive spatial analysis and visual tools to inform traffic safety enhancements. Her experience includes contributions to the **Los Angeles County Unincorporated Bike Plan** and the **Orange County E-Bike Safety Action Plan**.



**CALVIN THIGPEN**  
**PROJECT PLANNER | TOOLE DESIGN**

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Years of Experience: 9 | Master of Community Planning  
Master of Science, Neuroscience | Bachelor of Arts, Psychology

Calvin is Toole Design's New Mobility Practice Lead, bringing private-sector and research experience developing plans and programs for shared micromobility, including safety initiatives, parking plans, and equity programs. His experience includes leading a **USC study evaluating the effects of Slow Streets** and **bike infrastructure implementation on Lime ridership** and safety outcomes across multiple cities, as well as developing shared micromobility parking planning and implementation guidance for jurisdictions nationwide. Calvin also evaluates municipal regulations and best practices to help agencies plan and manage shared micromobility systems that improve safety, equity, and sustainability outcomes. He is passionate about helping communities make the most of shared micromobility and other emerging mobility options through thoughtful, data-driven planning and policy development.



**KYLE MCGOWAN, AICP, RSP<sub>1</sub>**  
**PROJECT PLANNER | TOOLE DESIGN**

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Years of Experience: 6 | Master of Urban Planning | Bachelor of Science, Urban and Regional Planning | American Institute of Certified Planners | Road Safety Professional 1

Kyle is a Transportation Safety Planner with extensive experience supporting active transportation and roadway safety planning. Kyle has supported bicycle planning efforts including the **Hawaiian Gardens Bicycle Plan** and the **Carson Bicycle Plan**, using GIS and design tools to develop clear, implementable safety and active transportation solutions.



**TERESA CHANG, RSP<sub>1</sub>**  
**ANALYST | TOOLE DESIGN**

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Years of Experience: 5 | Master of City Planning | Bachelor of Science,  
Bio-environmental Systems Engineering | Road Safety Professional 1

Teresa is a Data Analyst specializing in data-driven analysis for active transportation planning. She has supported clients across the U.S. through data analysis for bicycle and pedestrian plans, Safety Action Plans, and trail and climate resilience grant applications, including the **San Francisco Active Communities Plan** and the **Hawaiian Gardens Bicycle Plan**. Teresa also develops automated geospatial analysis tools and uses data analytics and visualizations to communicate insights and deliver clear, data-driven recommendations that support healthier, more sustainable communities.



**JESSICA HARLEAUX**  
**PUBLIC ENGAGEMENT PLANNER | ARELLANO ASSOCIATES**

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Years of Experience: 20 | Master of Urban Planning, Social and Community Planning  
Concentration | Bachelor of Arts, Psychology, Sociology Minor

Jessica brings experience supporting active transportation projects through hands-on, community-based engagement across Southern California. She specializes in on-the-ground outreach, equitable engagement strategies, and partnerships with community-based organizations to reach historically underrepresented communities. Jessica works directly with residents, stakeholders, and local partners to design and implement accessible, culturally responsive outreach. She has supported Toole Design on the **Hawaiian Gardens Bicycle Plan** and the **Los Angeles County Unincorporated Bike Plan**.



**JENNIFER VELAZQUEZ**  
**PUBLIC ENGAGEMENT PLANNER | ARELLANO ASSOCIATES**

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Years of Experience: 5 | Master of Urban and Regional Planning  
Bachelor of Arts, Urban Studies

Jennifer supports public planning and transportation projects, with extensive experience delivering public outreach for OCTA initiatives. Her OCTA-related work includes projects for **OC Transportation Demand Management** and the **OC Streetcar/Fixed Guideway Program**. Jennifer provides hands-on outreach support, including marketing and messaging development, social media coordination, bilingual collateral production, public event planning and implementation, stakeholder analysis, outreach documentation, and virtual meeting administration and facilitation.



## SAM ZNEIMER

ANALYSIS AND MODELING ENGINEER | CAMBRIDGE SYSTEMATICS

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Years of Experience: 15 | Master of Urban and Regional Planning  
Bachelor of Arts, History

Sam is a Senior Associate at CS with more than 15 years of experience in transportation planning and analysis across the public and private sectors. Sam leads CS's Active Transportation Practice Area, specializing in the application of quantitative modeling, network analysis, and data-driven methods to support active transportation and multimodal decision-making. His work emphasizes translating complex datasets—including travel demand models, safety data, and emerging mobility data—into actionable strategies that improve walking, bicycling, and transit access. Sam has led a wide range of analytically focused projects, including active transportation plans, bicycle connectivity and network gap analyses, level of traffic stress (LTS) modeling, safety and crash analysis, and Safe Routes to School studies. His project experience includes the **Orange County Bikeways Connectivity Study** and the **OCTA Transit Vision Plan**, where he supported data-driven evaluation of multimodal networks and investment priorities.



## SEAN MCATEE

ANALYSIS AND MODELING ENGINEER | CAMBRIDGE SYSTEMATICS

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Years of Experience: 25 | Bachelor of Science, Civil Engineering

Sean is a Principal and Technical Lead at Cambridge Systematics (CS) with 25 years of experience developing, updating, and applying trip-based and activity-based travel models nationwide. He actively manages travel modeling efforts for large and complex regions, including Southern California and the New York City metropolitan area, as well as for state departments of transportation and metropolitan planning organizations. Sean brings direct experience leading the **OCTA Travel Model Updates** and the **San Luis Obispo Citywide Travel Model**. His expertise includes integrating passively collected data into model development and calibration and creating intuitive visualization and dashboard tools that improve the accessibility and usefulness of model results for planning and decision-making.

## ADEQUACY OF LABOR RESOURCES

The table below shows the labor-hour allocation to this project by individual task. Considering our team's availability previously indicated, the Toole Design Team is confident in the adequacy of our labor resources to complete Move OC within OCTA's timeline.

Tasks	Toole Design																CS				AA				SUBTOTAL		
	Principal-in-Charge	Project Manager	Deputy Project Manager	Senior Advisor	Senior Advisor	New Mobility Lead	Engagement Lead	Planning Manager	Stakeholder Engagement	Recommendations Lead	Project Planner II	Senior Planner	Analyst II	Analyst	Project Planner II	Data Scientist	Graphic Designer	Analytics Lead	Modeling Lead	Modeling Support	Analytics Support	Senior Project Manager	Senior Project Coordinator	Creative Lead		Project Coordinator	Assistant Project Coordinator
1: Project Management and Meetings	47	106	97	6	6	-	12	0	66	12	18	-	-	-	-	-	-	8	-	-	4	47	47	-	-	-	476
2: Public and Stakeholder Engagement	37	83	143	-	-	-	125	45	65	-	45	40	25	10	20	-	25	-	-	-	-	127	264	30	369	584	2,037
3: VGOMs and Baseline Conditions	30	95	130	44	40	22	25	40	30	58	20	-	120	150	30	140	-	60	-	-	120	-	-	-	-	-	1,154
4: Analysis and Recommendations	39	100	160	24	20	40	-	55	32	130	-	75	35	95	80	125	-	20	40	125	50	-	-	-	-	-	1,245
5: Plan Developments	25	45	75	12	14	-	-	15	0	70	-	30	-	35	20	60	100	12	-	-	8	-	-	-	-	-	521
<b>TOTAL</b>	178	429	605	86	80	62	162	155	193	270	83	145	180	290	150	325	125	100	40	125	182	174	311	30	369	584	<b>5,433</b>



# WORK PLAN



## UNDERSTANDING OCTA'S NEEDS

Home to more than three million people, Orange County has made enormous progress in regional active transportation since the adoption of the OC Active Bike and Pedestrian Plan in 2019. As patterns in active transportation—how, where, why, and when people get around by walking, biking, and other rolling means—continue to evolve, a new strategy, framework, and set of customizable resources is needed to provide in-depth tools that work for the various contexts and challenges across the County.

Fundamentally, Move OC must provide an evidence-backed framework with clear guideposts for implementation, yet provide enough flexibility and diversity within its recommendations to allow the various municipalities to implement in ways that work best for them.

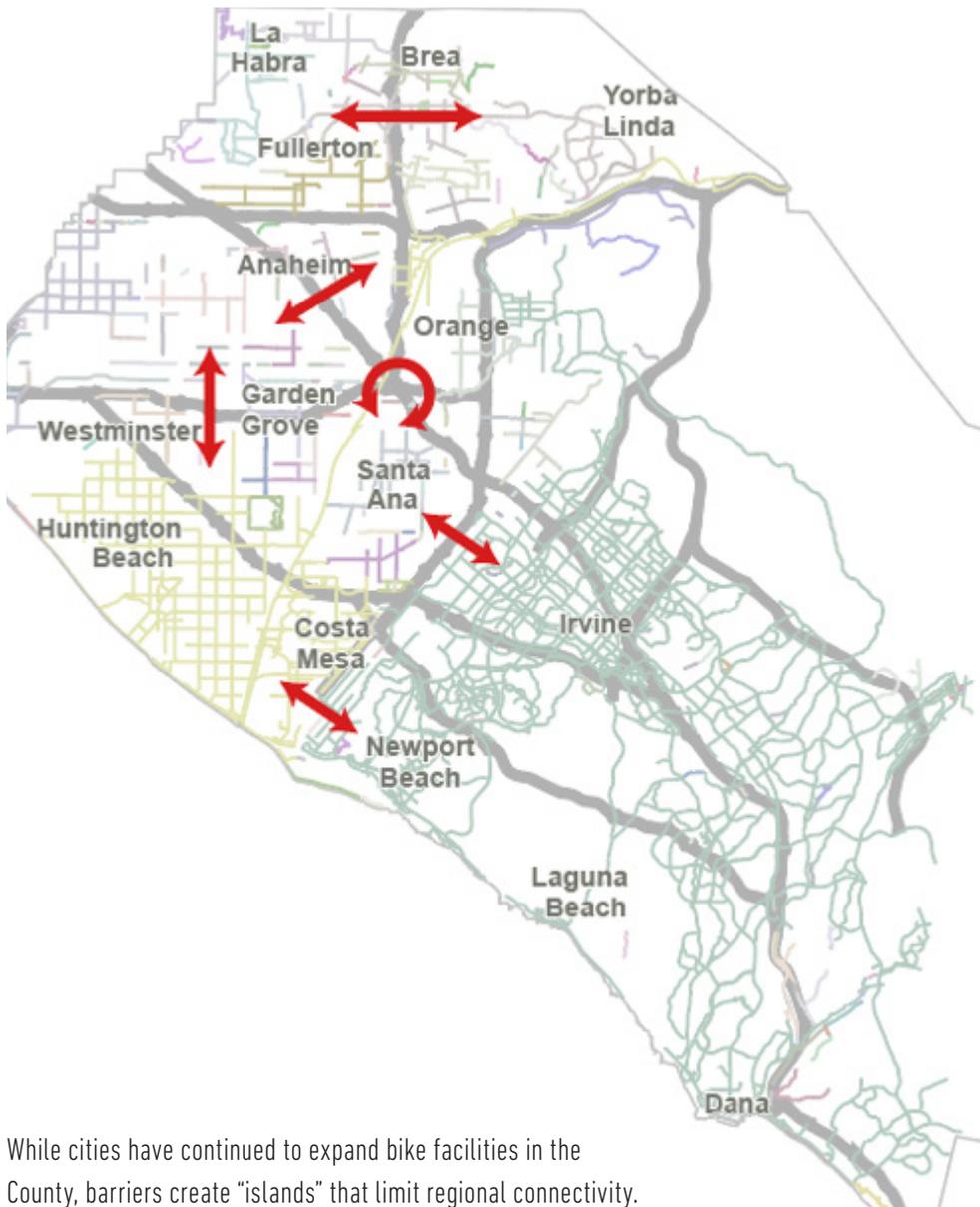
**A county with diverse transportation needs.** From Buena Park to San Clemente, each community in Orange County hosts a unique set of transportation conditions and needs. While beachside communities may have dense interconnected street grids that serve short trips to and around local downtowns, other jurisdictions are organized around larger arterials that serve lower-density areas and longer trip types. As a region, smartphone data estimates the county sees nearly 12 million walking trips every day. These patterns vary along with the diversity of the county, from mountains to seaside coves to urban centers.

To achieve the objectives of Move OC, diverse, context-sensitive sets of actions are needed for infrastructure, policy, program, and funding elements. These actions must provide feasible options for diverse contexts, while helping the county as a whole move the needle toward its overarching vision and goals.

### HOW PEOPLE TRAVEL BY ACTIVE TRANSPORTATION IN ORANGE COUNTY IS CHANGING

Our work the E-Bike Safety Action Plan has given us a leading view into the new mobility opportunities and issues. Shown to the right: Class 2 bikeway on arterial, a common condition with high opportunity for improvement.





While cities have continued to expand bike facilities in the County, barriers create “islands” that limit regional connectivity.

**Sensitivity to diverse agency stakeholder needs.** Active transportation implementation has progressed throughout Orange County at various paces since the adoption of OCTA's previous ATP: each of the 34 jurisdictions exhibits a different approach to implementation, though the vast majority now have their own ATPs and guiding visions for biking and walking.

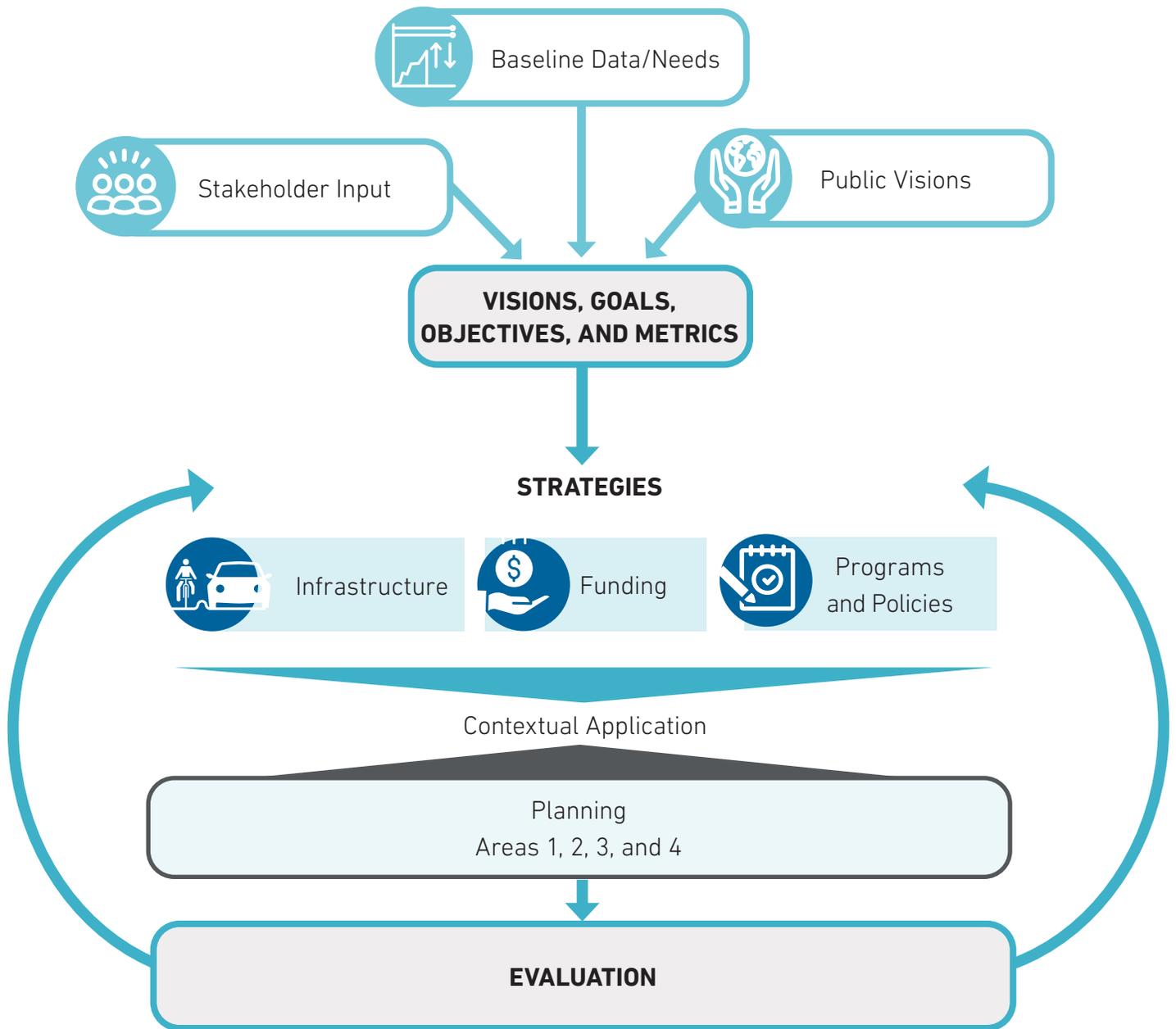
Move OC must be one that establishes ambitious regional goals in mode shift, safety, and connectivity that create a shared framework for the region, but includes alternative

actions that jurisdictions can take in alignment with their own approaches and values. This, in part, will be achieved through close collaboration with agency and jurisdictional stakeholders. It will also result from recommendations that are flexible yet effective, and tailored to the County's planning areas as defined through this plan process.

**A continuous operating system that drives ongoing commitments.** Move OC must be more than an inventory and lines on a map. The Visions, Goals, Objectives, and Metrics (VGOMs) should be developed and applied as an “operating system” for identification, prioritization, and implementation of multiple strategies for active transportation. In this way, Move OC will be a living, dynamic plan that can be adapted as conditions change and progress is achieved. Move OC will outline for jurisdictions the key steps they should take to make progress across multiple fronts, delineating exactly how they will work together to achieve

the visions established in the plan. The plan's recommendations will not be top-down directives, but rather essential guidance built with local needs in mind. It will also distinguish between local projects and help elevate regionally significant ones that require a greater OCTA role as coordinator and collaborator.

Our team is prepared and excited to begin work on the Move OC Active Transportation Plan, defining the key visions that will move the county together towards its shared goals.



Developed by a combination of existing needs and stakeholder and public input, the VGOMs will inform a system of recommendations tailored to each planning area.

# APPROACH

As leaders in the field, Toole Design has developed an approach that defines the best practice in regional active transportation planning. Drawing on our extensive experience with similar projects and a deep understanding of OCTA's goals, we have reorganized and, where appropriate, enhanced certain tasks to best align with the project's objectives. Our approach emphasizes the interconnected relation of the tasks, centering on the establishment and guiding principles of the VGOMs. Establishment and verification of the final VGOMs will outline analysis steps and recommendations approaches throughout the remainder of the plan. Ultimately, we will work with OCTA to create a dynamic planning system—rather than a static plan—featuring a performance dashboard and suite of GIS tools that will continuously inform and evolve OCTA's and local jurisdictions' active transportation policy and programming processes.

## **TASK 1: PROJECT MANAGEMENT AND MEETINGS**

### **TASK 1.1: PROJECT KICKOFF MEETING**

At the outset of the project, our team will hold a kickoff meeting to introduce roles, outline the critical path of plan development, and begin to identify key stakeholders. The kickoff meeting will be essential to identify early on potential challenges or impediments within the plan's goals and to proactively chart solutions to them, drawing on the project team members' collective experiences.

### **TASK 1.2: PROJECT COORDINATION**

Strong project management is the cornerstone of any successful plan. Project Manager Adam Wood, AICP is skilled in keeping large, multifaceted projects on schedule and budget, as he has done in regional ATPs nationally. Adam will be the agency's day-to-day point of contact, overseeing the strategic direction and delivery of the project. Throughout early stages, Adam will establish communication protocols and file-sharing systems to ensure the entire project team can access materials, findings, and notes as they are developed. Roger Pelayo, as Principal-in-Charge, will play an active advisory role and oversee the project. We propose monthly project management meetings to review deliverables and hold detailed discussions on technical tasks. We expect to hold more frequent meetings as necessary during project and task initiation phases and when extensive coordination is required. Toole Design understands that a clear Project Management Plan (PMP) provides a critical roadmap for delivering the project in a timely, reliable, and effective manner, especially for multijurisdictional projects. We will move immediately to develop a

PMP in collaboration with OCTA staff that defines goals and priorities and includes the following elements:

- A comprehensive project schedule with milestones and anticipated deliverable dates, as well as review periods for OCTA and the PDT
- A project management communications plan with clear responsibilities and protocols for coordinating with other county agencies
- A defined QA/QC process that ensures internal reviews of each major deliverable by our technical experts

We propose a 20-month timeline for the completion of Move OC, understanding that additional time may be required pending jurisdictional review and coordination periods.

### **TASK 1.3: PROJECT DEVELOPMENT TEAM**

A successful plan depends on the continual involvement and expertise of a dedicated group of stakeholders. Toole Design will work with OCTA to identify suitable representatives from member jurisdictions and other OCTA departments to serve on the PDT, with an emphasis on capturing representation from all four planning areas and multiple phases of project delivery (planning, funding, policy, and implementation). In addition to functioning as technical experts, the PDT will be essential to confirming and advising on approaches to best reach a wide range of community members and organizations across each of their planning areas. We propose convening this group every other month, with meetings oriented towards key milestones where PDT input and feedback may be best utilized.

### **TASK 1 DELIVERABLES:**

- Kickoff meeting and materials
- Monthly progress reports to support invoicing
- Project Management Plan
- Monthly project management meetings and materials
- Bi-monthly PDT meetings and materials

### **TASK 2: PUBLIC AND STAKEHOLDER ENGAGEMENT**

Deep and consistent engagement with Orange County community members, regional agencies, and local jurisdictions will be a foundation of Move OC. Our team's approach proposes unifying some subtasks from the RFP to showcase their complementary functions in the planning process. Original subtask numbers are noted in parentheses.

## **TASK 2.1: PUBLIC ENGAGEMENT PLAN**

Our engagement team, supported by AA and informed by their deep familiarity with OCTA and Orange County communities will develop a Public Engagement Plan with OCTA staff input early on. This will identify key goals of engagement, outline outreach strategies, and develop consensus on messaging and tactics. The PEP will delineate two phases of engagement: Phase 1 will focus on learning countywide visions for active transportation and receiving feedback on draft VGOMs; Phase 2 will solicit feedback on draft infrastructure, policy, programming, and funding recommendations. Our team is skilled at developing customized engagement plans that offer accessible and equitable ways for people to engage. At the end of each phase, our team will summarize key feedback, outreach metrics, and lessons learned in two engagement summary memos, which will be reflected together in a final engagement summary memo.

## **TASK 2.2: STAKEHOLDER ENGAGEMENT (TASKS 2.2 AND 2.3 IN THE RFP)**

We will work with OCTA staff to identify all regional agency, local jurisdiction, and institutional stakeholders relevant to the development of the plan. Stakeholders may include a range of representatives, from those in local public works agencies to relevant Caltrans staff. Two digital surveys will be provided to this group, which will focus on developing a deeper understanding of the goals and metrics important to them, implement active transportation projects, and their feedback on proposed recommendations. Through this task, the Toole Design Team will also prepare presentation materials for 6 presentations to OCTA committees to keep them informed of progress and solicit feedback at key milestones.

## **TASK 2.3: PUBLIC OUTREACH AND ENGAGEMENT (TASKS 2.4, 2.5, 2.6, 2.7, AND 2.8 IN THE RFP)**

The guiding plan goals will be deeply informed by the visions expressed by Orange County residents: an effective plan will be one that channels their lived experiences into recommendations that address barriers and concerns. Over the two phases of engagement, our team will conduct eight in-person events throughout the county, two per planning area, aiming to meet people where they are and to collect



The OCTA E-Bike Safety Plan Stakeholder Committee participating in a group e-bike ride.

feedback in accessible, meaningful ways. We will also host two virtual webinars or workshops to provide an accessible way for residents to participate and learn more about the plan. Two digital surveys will offered detailed ways for residents to share their experiences and provide direct feedback on plan recommendations.

Our team is experienced in working with community-based organizations to ensure engagement processes best reflect and reach county residents, especially those who may often not be captured in outreach efforts. We will work with OCTA staff to identify CBOs that are best suited to aid in reaching these communities, and will bring them into the project team via direct, compensated partnerships. Working with these CBOs, we will identify the best way involve them in targeted outreach, such as intercepts at local events or canvassing of hard-to-reach areas.

#### **TASK 2.4: COLLATERAL, BRANDING, AND DIGITAL MEDIA (TASKS 2.9 AND 2.10 IN THE RFP)**

Clear, consistent branding will aid in communicating plan goals and keeping residents and stakeholders informed of progress. We will work with OCTA to develop collateral such as flyers, fact sheets, and infographics in up to three languages. Additionally, we will assist OCTA with development of digital media content to support the agency's digital channels and website.



#### **TASK 2 DELIVERABLES:**

- Public Engagement Plan
- Phase summary memoranda
- Six institutional engagement presentations
- Two stakeholder surveys and summary
- Two public surveys and summary
- Public engagement notes
- CBO stipend
- Promotional digital media and branded collateral
- Final engagement report
- Targeted interaction attendance
- In-person and virtual engagement events and materials (up to 10)



Top: Door hanger created by Toole Design for the OCTA Active Transportation Support Services contract.

Bottom: Malia Schilling facilitates a meeting of the LADOT Safe Routes for Seniors Stakeholder Group.

## **TASK 3: VGOMs AND BASELINE DATA**

### **TASK 3.1: VGOM DEVELOPMENT**

VGOMs are at the core of Move OC. The directions and visions captured within the plan's VGOMs not only provide an overarching idea of how transportation should progress in Orange County, but they are also discrete sets of goals and metrics that outline how that vision will be realized over time. Each will inform the direction of analyses conducted through Task 4. A VGOM may, for example, call for the desire to achieve a countywide modal shift towards active modes and transit, or the ability of a broader range residents to reach low-stress bicycling facilities within a half-mile.

The Toole Design Team also envisions these VGOMs as being interrelated and cross-reinforcing: as conditions that encourage modal shifts emerge in the County, they will build upon one another and support additional changes in travel choices, safety outcomes, and trip patterns. They will be rooted in a core vision outlined by OCTA staff at the outset of the project and established in part with the PDT.

Development of the VGOMs will begin in coordination with Task 3.3, the analysis of existing conditions data. These baseline conditions will reveal barriers and trends that the plan's goals should reflect, charting a path to address them. This development will also be informed by the initial phases of stakeholder engagement, which will provide consensus on the desired direction and outcomes of the County's transportation system. The PDT will also provide essential input on the directions of the VGOMs and the most useful objectives and metrics to reach and monitor them.

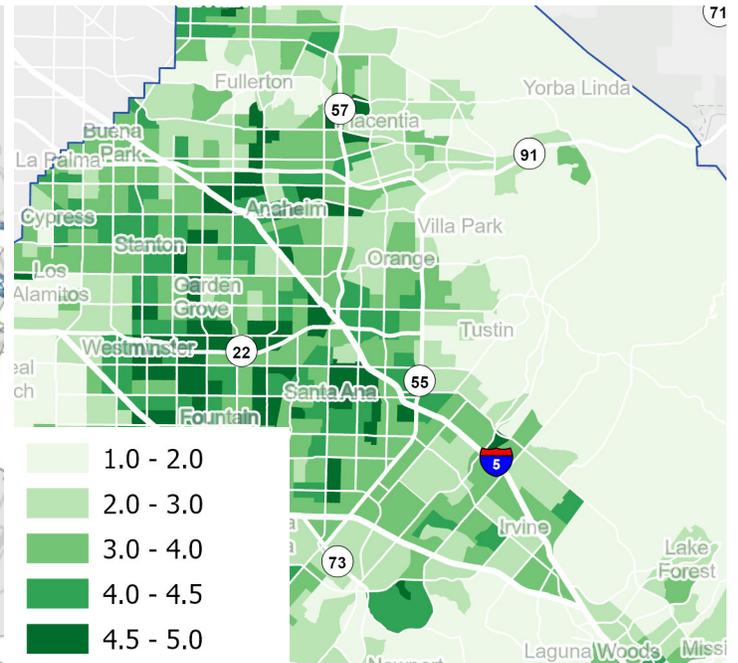
### **TASK 3.2: FINAL VGOMS**

Following input collected from public engagement events, stakeholder outreach, the PDT, and public surveys on the VGOMs to vet and provide detailed feedback, the Toole Design Team will work with OCTA staff to finalize the set of VGOMs. At this stage, the team will identify and confirm the analyses necessary to outline the metrics and objectives in alignment with achieving the identified goals and visions.

**Dashboard.** To track the performance progress of the county and offer a continual resource for jurisdictions, Toole Design will develop an accessible, interactive online dashboard. The dashboard will display statistics related to active modes, including safety, connectivity, and accessibility, all connecting the contemporary condition to the conditions at the time of plan adoption to demonstrate progress towards VGOMs.



Toole Design developed new GIS tools for the City of Austin to assess the coverage and utility of its sidewalk network. The tools identified the percentage of parcels connected to existing sidewalks, as well as the percentage of parcels connected via a continuous sidewalk to daily destinations. While none of these performance measures are intended to reach 100%, increases are expected as the City fills sidewalk gaps in priority areas.



Working with CS on the Orange County Bikeway Connectivity Study, Toole Design developed the Bike Propensity Index to understand where bikeways might best support new biking trips in the County.

The dashboard will allow OCTA staff to visualize scenarios developed in Task 4.3, comparing progress to intended outcomes and charting next steps in implementing funding, new policies, and programming projects.

**TASK 3.3: EXISTING CONDITIONS (TASKS 3.3, 3.4, AND 3.5 IN THE RFP)**

An existing conditions analysis is key to understanding the current state of travel patterns and outcomes within Orange County. The Toole Design Team will compile a data request in collaboration with OCTA staff, identifying data gaps and approaches to solicit any necessary data from local jurisdictions and regional agencies. We will build upon our prior work with CS in developing OCTA's Bicycle Propensity Index, cataloging and investigating the wide array of geospatial characteristics that facilitate and restrict active transportation travel. Several subtasks within the RFP are unified within this task: their original number is called out in parentheses.

Toole Design has a suite of analyses we are experienced in conducting, and we look forward to discussing with OCTA staff and stakeholders which would be most appropriate and desirable for identifying patterns and opportunities within Orange County.

- **Crash/Safety Analysis:** Toole Design can perform additional crash or safety analysis, which can include identifying segments that have elevated crash risk based on combinations of attributes associated with elevated average crash frequencies.
- **Pedestrian Propensity:** Building off of methods developed through the Bicycle Propensity Index, we can develop an index to identify areas most suited for increasing pedestrian trips.
- **Crossing Stress and Gap Analysis:** Using Toole Design's Pedestrian Crossing Level of Traffic Stress methodology, we can rate the comfort of every intersection and mid-block crossing. We can then calculate gaps between low-stress crossings to illustrate barriers to walkability.
- **Level of Traffic Stress/Bicycle Comfort Index:** We can deploy a tailored Bicycle Comfort Index (BCI), which we developed for SFMTA. This entails updated LTS ratings and factoring in additional information such as slope, land use context, and infrastructure details to arrive at a more holistic assessment of comfort.
- **Multimodal Access Analysis:** This analysis builds upon stress and comfort analyses to evaluate walk- and bikesheds to essential destinations, and rate the level of access at the block scale.
- **Equity Analysis:** We propose evaluating the results of previous selected analyses to identify and evaluate disparities in safety, comfort, and access. This can be used to identify areas that may be prioritized for infrastructure implementation based on a goal of creating an equitable active transportation system.

**Infrastructure, Plans, and Policies.** The Toole Design Team will work with OCTA and jurisdiction staff to develop an in-depth database of bicycling and walking-related facilities throughout the County, including bike lanes, paths, and sidewalks. This endeavor will build upon and update earlier projects and datasets, such as our work with the Orange County Bikeways Connectivity Study, to create the most up-to-date dataset of existing and planned facilities. This task will also gather relevant policies, plans, and guidance significant to active transportation projects in the county. Analyses in this task will reveal where networks of bikeways can and cannot take OC residents, establishing baseline condition of local need for communities with poor low-stress connectivity.

**Demographics and Land-Uses.** We will develop a comprehensive land-use and demographic dataset, employing analyses to understand where people are likely to bike and walk and which destinations might draw or generate those trips. We seek to build off of progress with the Bicycle Propensity Index, adding granularity to results and expanding our understanding to pedestrian trip propensity. These analyses will also highlight equity conditions and needs within the county, guiding how recommendation scenarios are focused.

**Transportation and Safety Data.** Drawing on insights from regional data, Toole Design will analyze and summarize action transportation travel and safety data, with a focus on the past five years. We will utilize OCTA's Streetlight platform to develop a deep understanding of how people are traveling and where concentration of short trips are occurring that may be converted to active trips. We will explore potential additional sources of data, drawing on our national research into active transportation decision-making data through NCHRP 08-165, to provide OCTA with background on other available options, potentially including those necessary to understand near miss conditions that may otherwise not be collected in crashes. Lastly, Toole Design has access to the Replica trip data platform, and may use that to evaluate what additional trip patterns emerge.

In addition to summary memos, we propose developing an interactive webmap of conditions and analysis results to facilitate feedback from the PDT and other stakeholders. The webmap will become one aspect of the ultimate Move OC Plan components, to be integrated as part of the plan's final framework system, complementing the dashboard detailed in subtask 3.2.

### **TASK 3 DELIVERABLES:**

- Visions, Goals, Objectives, and Metrics Memo (Draft and Final)
- Infrastructure and Policy Findings Summary Memo
- Demographics and Land-Use Findings Summary Memo
- Transportation and Safety Findings Summary Memo

### **TASK 4: ANALYSIS AND RECOMMENDATIONS**

We understand that Move OC recommendations are not about separate infrastructure projects, but must be focused on moving the county toward the identified visions and goals. OCTA and local jurisdictions need options and flexibility so that different communities can implement meaningful steps. As VGOMS are currently

unknown, the below approaches embody our current vision: however, if we identify a VGOM approach that requires different steps, we will work with OCTA to find the method that best matches it. We will begin this task with a scan of national agencies that have made significant steps towards mode shift on a regional level, developing an understanding of what has worked to guide jurisdictions towards shifts in modal choice, safety, and connectivity. Recommendations will then be crafted following lessons learned from this step.

## **TASK 4.1: INFRASTRUCTURE RECOMMENDATIONS**

Informed by the infrastructure conditions and analysis conducted in Task 3 and the directions outlined by the final VGOMs, Toole Design will create a framework that OCTA and local jurisdictions can use to identify and prioritize local biking and walking facilities.

These infrastructure recommendations will group corridors throughout the county into a set of tiers for both bicycling and walking facility needs, based on factors such as connectivity to employment centers, street density, and short-trip activities. Tiers will be developed to reflect to whom a roadway is important: regionally significant routes that connect and align jurisdictions, or local routes that offer flexibility. Following these network functions, we will work with local jurisdiction input to create “locally significant networks” that connect to the region. The approach will be contextually based, centered on the relative needs and opportunities for each planning area. Each will be matched with a suite of recommended infrastructure treatments, based on the evaluated need and benefits for future bicycling and pedestrian infrastructure. Prioritization will be layered atop these recommendations, based on analysis results reflective of planning area contexts.

While this project will not scope individual projects on a countywide basis, this framework process and prioritization results will continually guide jurisdictions as they look to develop active transportation projects in their area and update future plans.

## **TASK 4.2: PROGRAM RECOMMENDATIONS**

Drawing from our analysis of the non-infrastructure programming resources available today for Orange County residents, we will propose a suite of programs designed to meet current needs and fill



**Recommendations for the priority Safe Routes for Seniors in Chinatown, Los Angeles.**

gaps in program types. Recommendations will draw upon regional and national best practices, and will look to address and engage user groups who may be the most vulnerable while bicycling and walking—such as younger children and the elderly—while seeking to reach new audiences. Integrated with other recommendation types, programs will aim to support a systematic shift towards achieving VGOMs.

### **TASK 4.3: POLICY RECOMMENDATIONS**

Policy recommendations will outline the core, systematic levers that drive active transportation shifts in the county. As with programmatic recommendations, these will be drawn from national best practices and precedent. The team will estimate quantitative justifications for policies, such as incentives for first/last mile investments driven by connectivity gaps in station areas, to document the origins and demand for each recommendation.

### **TASK 4.4: FUNDING RECOMMENDATIONS**

To support the implementation of recommended programs and scenarios of infrastructure investment, the project team will develop a set of funding recommendations. These will use high-level cost estimates to determine an overall cost of the network, costs of regional and tiered components of it, and how long it take to develop it under various funding scenarios and implementation methods, such as street reconstruction and retrofits. These recommendations will outline what levels of implementation are possible following various local and regional funding approaches.

### ***TASK 4.3: SCENARIO MODELING (OPTIONAL)***

To optimize project recommendations and best understand the effect of various active transportation investments in achieving VGOM-identified goals, the Toole Design Team proposes modeling a variety of recommendation and implementation scenarios. Our team features Cambridge Systematics (CS), who have extensive experience working with the OCTA modeling team and the OCTA model (OCTAM), as well as national expertise in the modeling field. Leveraging this experience, our team will work directly with OCTA modeling staff to develop, vet, and test project scenarios. Following approaches set by identified VGOMs, CS can utilize the OCTAM to evaluate recommendations in several ways, including use of the model as built, enhancements to the model to better capture active transportation, and off-model approaches that make use of model data and results. Our team will work with OCTA modeling staff to develop the inputs for OCTAM runs and analyze output data to provide insights important to recommendations.

Building off recent steps to improve OCTAM for active transportation, the Toole Design Team may consider including connectivity, capturing network conditions that discourage or encourage bicycle use. Other steps may include approximating local streets through a variety of options, with consideration for differences in street density throughout the county. The use of these methods can improve the projected model outcomes to provide insight to differing recommendation scenarios.

As the goals and recommendations are identified, our team is committed to working with OCTA staff to develop an approach to modeling recommendation and to develop insights and tools to support plan implementation and future planning efforts.

#### **TASK 4 DELIVERABLES:**

- Infrastructure recommendations memorandum and webmap
- Geodatabase of infrastructure recommendations
- Programming recommendations memorandum
- Policy recommendations memorandum
- Funding recommendations memorandum
- Modeling scenario memorandum (optional)

### **TASK 5: PLAN DEVELOPMENT**

#### **TASK 5.1: DRAFT PLAN**

The final Move OC Active Transportation Plan will be built on robust data analysis and documented engagement, outlining a clear path and process set by VGOMs that will guide projects over the next 20 years. The RFP describes a PDF plan document, an approach which is reflected below. If desired, we can work with OCTA to identify what will be adopted by the Board in a plan document (such as policies and VGOMs), and develop other parts of the plan that can be captured in flexible online resources, such as webmaps and recommendation toolkits, that are oriented around the central VGOM dashboard.

Toole Design will compile work done in previous tasks and recommendations into a data-driven, visionary, and graphically rich plan. The structure and format of the plan will first be reviewed as an outline by OCTA. An administrative draft will then be reviewed by the PDT.

To effectively present the components of the VGOM framework, Toole Design can develop a living, online format, such as an ArcGIS StoryMap, that includes the baseline analyses, funding scenarios, VGOM dashboard, and infrastructure recommendation tiers and toolkits. In addition to being accessible over a long period of time, these components will be designed to be regularly updated, transforming the Plan into a living framework. This can offer an effective way to communicate to local agency stakeholders, becoming the main way they interface with the plan.

The report will be provided in an engaging, legible PDF that supports and facilitates the usage of those component recommendation and baseline dataset resources. Documentation in the plan will draw a clear line from the baseline analyses and public engagement to the VGOMs, delineating how each of the recommendations works to reach those visions.

We anticipate that interim work products, including community engagement summaries, existing conditions reports, and detailed analysis findings will be included as appendices or links within the plan deliverable.

A public draft will be developed for comment, and public input will be collected, documented in a matrix.

## **TASK 5.2: FINAL REPORT**

The Toole Design Team will incorporate public and stakeholder feedback to the plan document and online formats. The team will prepare a final presentation for the OCTA Board of Directors that highlights the plan's strategies while charting a clear line from need and input to recommendation.

### **TASK 5 DELIVERABLES:**

- Administrative Draft Report
- Public Draft Report
- Final Report and presentation

# ENHANCEMENTS AND INNOVATIONS

As described through the above proposed scope, the Toole Design Team's approach contains multiple proposed enhancements to produce an effective plan that best addresses today's needs across Orange County. These include the following:

- 1 Operating System Structure:** Our team is excited by OCTA's VGOM-forward approach to this project. We look forward to the opportunity to help OCTA create not just a static plan, but a VGOM-based operating system that is dynamic and useful over time for all Orange County jurisdictions. This means developing a unique format that allows various agencies to make use of the plan as a framework to make continuous planning decisions. This operating system structure will be implementation-focused as a central resource within the county, allowing stakeholders to continuously reference the plan, identify objectives and metrics they wish to progress, and select the appropriately contextually tailored recommendation. In practice, this means creating a modular plan with objective-focused alternative recommendations and a framework for using measures to recalibrate the plan as implementation occurs.
- 2 VGOM Dashboard:** In support of the operating system approach, we propose the development of a VGOM Dashboard as one of the Task 3 components, providing OCTA staff, and ultimately stakeholders and jurisdictions, a view of key goals and metrics. We feel that a dashboard, or similar online tracking system, is essential for understanding and tracking the county's collective progress over time in meeting VGOMs and identifying needs and opportunities to recalibrate.
- 3 Propensity, Connectivity, Comfort and Other Analyses:** Our team is experienced in developing countywide analyses and indices that highlight potential needs and opportunities for active transportation. As our approach states, we look forward to working with OCTA to identify analyses best suited to investigate needs relevant to draft VGOMs and plan priorities. In particular, we propose building on our work with the Bicycle Propensity Index by developing a Pedestrian Propensity Index to highlight areas supportive of additional walking trips. We also see an opportunity to potentially develop a tailored Bicycle Comfort Index to better integrate variable context factors (such as grade/slope and land use patterns) to understand how the bicycling experience varies across the county, moving beyond Level of Traffic Stress.

## SEQUENCE OF ACTIVITIES

The below table documents the proposed sequence of activities on a roughly sequential basis, bringing together the proposed approach with its schedule.

STAGE	ACTIVITY	RESPONSIBLE STAFF
1: Intro and Baseline Conditions	Project initiation, consolidation of conditions data, and development of initial VGOM concepts	
	Kickoff meeting and PMP	Adam Wood, Adam Russell, Jennifer Velazquez, Jessica Harleaux, Sam Zneimer, Sean McAtee
	Stakeholder development and PDT kickoff	Lila Singer-Berk
	Draft VGOMs development	Adam Wood, Andy Clarke
	Baseline conditions data consolidation; existing conditions analyses	Theja Putta, Sam Zneimer, Sean McAtee
	Public Engagement Plan development and CBO outreach	Erika Kulpa, Jennifer Velazquez, Jessica Harleaux
2: VGOM Refinement	Review and refinement of draft VGOMs	
	Public Engagement Phase 1 (Visioning and Draft VGOM feedback): In-person and targeted outreach, virtual meetings, digital media content	Erika Kulpa, Jennifer Velazquez, Jessica Harleaux
	Stakeholder Survey #1	Lila Singer-Berk, Adam Russell
	Final VGOM development	Adam Wood, Andy Clarke
3: Draft Recommendations	Synthesis of final VGOMs and existing into draft recommendations	
	Development of draft infrastructure, funding, programs, and policy recommendations	Wendy Phillips, Malia Schilling, Theja Putta
	Recommendations scenario modeling (optional)	Sam Zneimer, Sean McAtee
	Public Engagement Phase 2 (Recommendations Review): In-person and targeted outreach, virtual meetings, digital media content	Erika Kulpa, Jennifer Velazquez, Jessica Harleaux
	Stakeholder Survey #2	Lila Singer-Berk, Adam Russell
	Public Survey #2	Erika Kulpa, Jennifer Velazquez, Jessica Harleaux
4: Final Recommendations and Move OC Report	Development of final recommendations and components of final report	
	Refinement of infrastructure, funding, program, and policy recommendations	Wendy Phillips, Malia Schilling, Theja Putta
	Draft Move OC Report	Adam Wood, Adam Russell
	Final Move OC Report and Board Adopt	Adam Wood, Adam Russell

# SPECIAL ISSUES AND SOLUTIONS

Toole Design has encountered common challenges and lessons learned while developing and implementing ATPs and related projects. As practical problem-solvers, we are motivated by these challenges and inspired by each community's unique perspectives. You can trust us to minimize risk and to translate challenges into unique, context-sensitive solutions for Orange County.

ISSUE	SOLUTION
<b>Process:</b> Setting expectations between jurisdictions, OCTA departments, residents, and other stakeholders	We will be clear and transparent in project communications, letting people know how their input will fit into the project's decision-making process. We can support OCTA with any updates to internal and external communications including project updates, draft VGOMs, and draft recommendations.
<b>Efficacy:</b> Building a plan that acts as a continual resource for jurisdictions, while allowing for local flexibility	We understand that the ultimate Move OC Plan should be a key, living resource that agencies can continuously return to when developing plans and projects. We will work with OCTA, the PDT, and regional stakeholders to present resources in formats directly relevant to how they implement projects, and provide recommendations that provide the high degree of flexibility needed to meet their unique contexts.
<b>Data:</b> Establishing baseline conditions using data from a variety of jurisdictions may result in incomplete, patchy, or outdated datasets, with potential for compatibility issues	We understand that it is rare for major metropolitan regions to have comprehensive, consistent, and up-to-date datasets about active transportation facilities and plans at a fine-grain level. We will work with OCTA to proactively identify gaps and inconsistencies and leverage our experience drawing from proxy datasets where necessary to ensure all relevant factors are explored.
<b>Goals:</b> Creating meaningful visions and goals that build consensus on a broad scale while being actionable	Toole Design knows that a plan's vision must balance ambition with the realistic steps necessary to achieve it. We're experienced in crafting plans that are contextually sensitive to the unique, diverse needs across a region, and enable multiple jurisdictions to work toward aligned outcomes.
<b>Approach:</b> Integrating innovative planning methods to an ATP that must meet the needs of multiple jurisdictions	Planning for multijurisdictional multimodal networks must consider a variety of reasons why people choose to walk, bike, or take transit. Our planning process will consider the importance of factors such as trip generators and attractors, bicyclist and pedestrian comfort and stress, trip distances, access to transit, topography and grades, and land use context. The result will be an innovative system that can function over time to guide investments.

## QUALITY CONTROL METHODS

As part of our commitment to providing the highest level of quality, Toole Design employs a rigorous Quality Assurance/Quality Control (QA/QC) program to control the quality of our work as well as that of our subconsultants. Every Toole Design project is assigned a Principal-in-Charge, a senior staff member who takes personal responsibility for Toole Design's performance on the project. Projects then start with an internal kickoff meeting where the project manager and Principal-in-Charge work with the project team to clearly define and document the roles and responsibilities of all team members and discuss the appropriate QA/QC process. Before any project begins, our project manager will have considered the time and energy required to appropriately review and approve all project deliverables as part of the proposed cost and schedule. Toole Design also keeps internal documentation of our rigorous review process, providing our clients with the confidence that, if needed, our process can be shown after the fact. For this project, Principal-in-Charge, Roger Pelayo, will oversee our the QA/QC program.

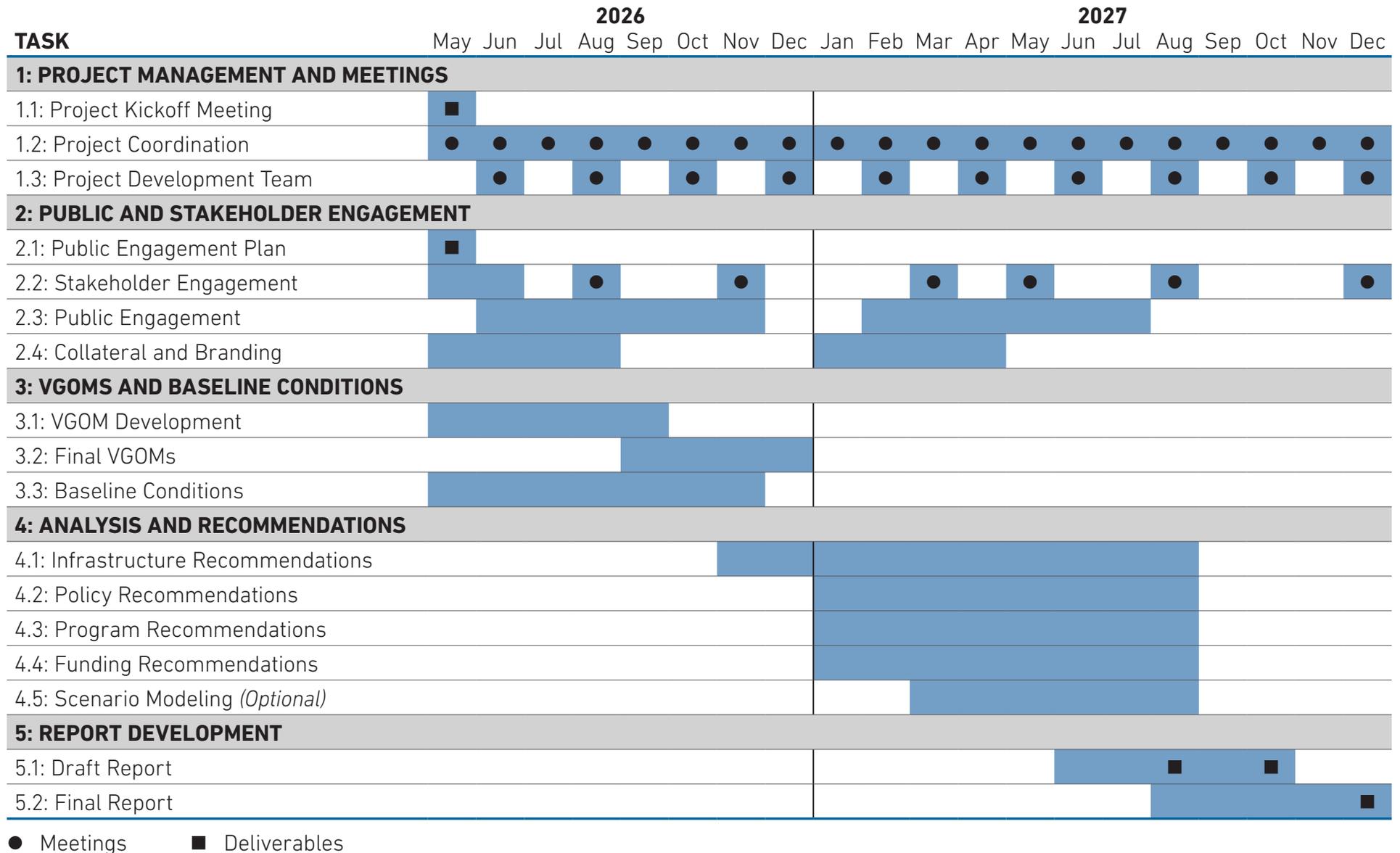
The production of a quality products frequently involves the combined efforts of several individuals. As a result, all Toole Design staff involved in the project are expected to adhere to this philosophy:

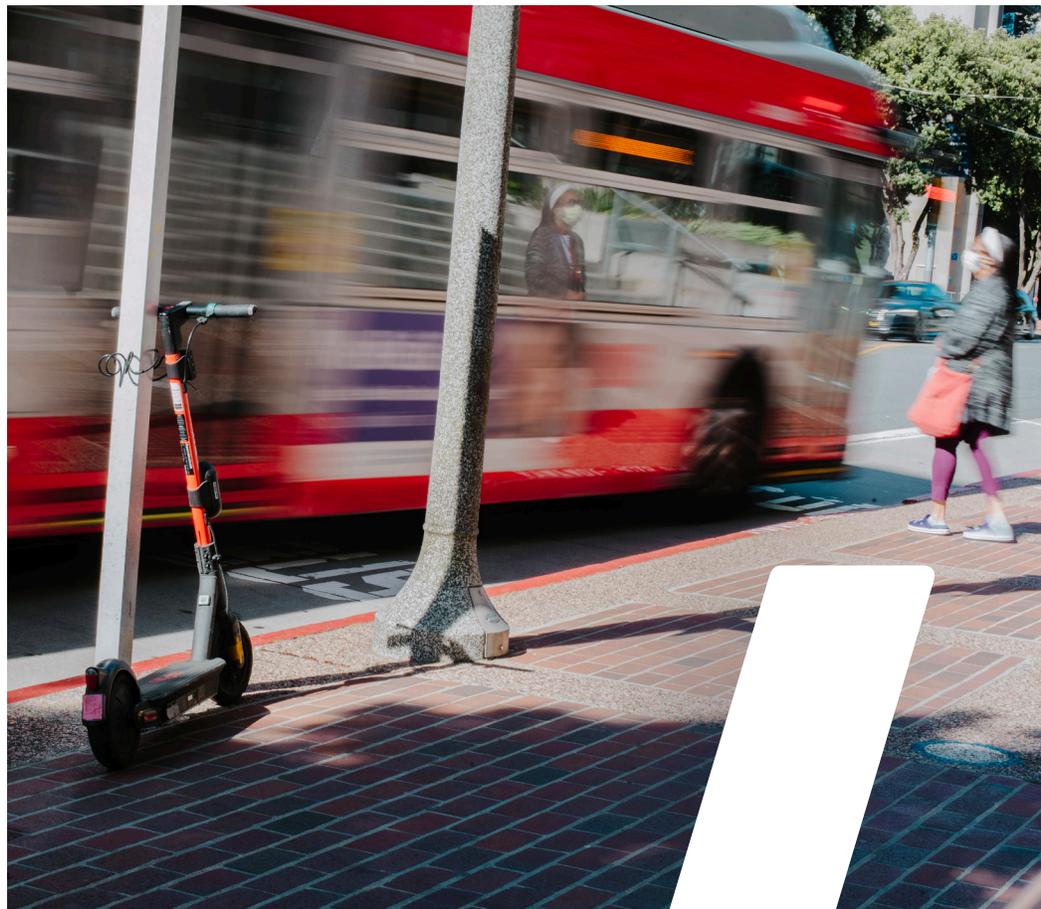
- **Quality is achieved** through adequate project planning, coordination, supervision, and technical direction; proper definition of project requirements and procedures; the use of appropriately skilled personnel; and by individuals performing work functions carefully, accurately, and completely.
- **Quality is controlled** through checking, reviewing, and monitoring of work activities by individuals with appropriate levels of experience and who are not directly responsible for performing the work.
- **Quality is assured** through a qualified staff person conducting independent reviews of the project's processes, procedures, documentation, supervision, technical direction, and staffing.
- **Quality is critical** to project success and client satisfaction, and achieving Toole Design's quality goals requires careful planning and budgeting.

The QA/QC program provides Toole Design project managers with proven processes and tools for delivering products on time and within budget. The program is also constantly evolving—project managers are encouraged to share project management and production review processes within the company, which improves our efficiency and attention to detail. The program can be summed up simply: no report, drawing, or product of any kind leaves our office without a documented review. **We demand the same level of performance from our subconsultants, and our senior staff thoroughly review their work before its submittal.**

# SCHEDULE

The below chart presents the approximately 86-week period in months for legibility. As can be attested by our references, Toole Design has a strong track record of adhering to project schedules as well as adjusting to changes in the timeline requested by our clients. We look forward to refining this in partnership with OCTA.





# EXCEPTIONS/DEVIATIONS AND FORMS





## PROPOSAL EXCEPTIONS AND/OR DEVIATIONS

The following form shall be completed for each technical and/or contractual exception or deviation that is submitted by Offeror for review and consideration by Authority. The exception and/or deviation must be clearly stated along with the rationale for requesting the exception and/or deviation. If no technical or contractual exceptions or deviations are submitted as part of the original proposal, Offerors are deemed to have accepted Authority's technical requirements and contractual terms and conditions set forth in the Scope of Work and Proposed Agreement. Offerors will not be allowed to submit this form or any contractual exceptions and/or deviation after the proposal submittal date identified in the RFP. Exceptions and/or deviations submitted after the proposal submittal date will not be reviewed by Authority.

Offeror: TDG Engineering, Inc.

RFP No.: 250113 RFP Title: Move OC Active Transportation Plan

Deviation or Exception No. : 2

Check one:

- Scope of Work (Technical) \_\_\_\_\_
- Proposed Agreement (Contractual) X

Reference Section/Exhibit: B Page/Article No. 14

Complete Description of Deviation or Exception:

A. CONSULTANT shall indemnify, defend and hold harmless AUTHORITY, its officers, directors, employees and agents (indemnities) from and against any and all claims (including reasonable attorneys' fees and reasonable expenses for litigation or settlement) for any loss or damages, bodily injuries, including death, damage to or loss of use of property but only to the extent caused by the negligent acts, omissions or willful misconduct by CONSULTANT, its officers, directors, employees, agents, subconsultants or suppliers in connection with or arising out of the performance of professional services under this Agreement. Consultant's duty to indemnify and defend Indemnitees shall not exceed the Consultant's proportionate percentage of fault per Civil Code §2782.8.

Rationale for Requesting Deviation or Exception:

To bring the clause into compliance with Civil Code §2782.8. Civil Code §2782.8 prohibits requiring a design professional to defend upon tender. Defense costs may be shifted only after final adjudication and only in proportion to fault, and limited to negligence, recklessness, or willful misconduct in the performance of professional services under the agreement.

Area Below Reserved for Authority Use Only:



## PROPOSAL EXCEPTIONS AND/OR DEVIATIONS

The following form shall be completed for each technical and/or contractual exception or deviation that is submitted by Offeror for review and consideration by Authority. The exception and/or deviation must be clearly stated along with the rationale for requesting the exception and/or deviation. If no technical or contractual exceptions or deviations are submitted as part of the original proposal, Offerors are deemed to have accepted Authority's technical requirements and contractual terms and conditions set forth in the Scope of Work and Proposed Agreement. Offerors will not be allowed to submit this form or any contractual exceptions and/or deviation after the proposal submittal date identified in the RFP. Exceptions and/or deviations submitted after the proposal submittal date will not be reviewed by Authority.

Offeror: Cambridge Systematics, Inc.

RFP No.: 250113 RFP Title: Move OC Active Transportation Plan

Deviation or Exception No. : 4

Check one:

- Scope of Work (Technical) \_\_\_\_\_
- Proposed Agreement (Contractual)  X

Reference Section/Exhibit: B Page/Article No. 9.B

Complete Description of Deviation or Exception:

Proof of such coverage, in the form of a certificate of insurance and an insurance policy blanket additional insured endorsement, designating AUTHORITY, its officers, directors and employees as additional insureds on general liability and automobile liability, as required by Agreement. Proof of insurance coverage must be received by AUTHORITY within ten (10) calendar days from the effective date of the Agreement and prior to commencement of any work. Such **Commercial General Liability and Automobile Liability** insurance shall be primary and non-contributive to any insurance or self-insurance maintained by the AUTHORITY. Furthermore, AUTHORITY reserves the right to request certified copies or review all related insurance policies, in response to a related loss **that may be covered by such CONSULTANT insurance policies.**

Rationale for Requesting Deviation or Exception:

While the Commercial General Liability and Auto Liability policies can be made primary to the Authority, Workers Compensation, Employers Liability and Professional Liability cannot be made primary to the Authority, as the Authority would not be an additional insured on those policies.

Area Below Reserved for Authority Use Only:



ORANGE COUNTY TRANSPORTATION AUTHORITY  
CAMPAIGN CONTRIBUTION DISCLOSURE FORM

RFP Number: 250113 RFP Title: Move OC Active Transportation Plan

Was a campaign contribution made to any OCTA Board Member within the preceding 12 months, regardless of dollar amount of the contribution by either the proposing firm, proposed subconsultants and/or agent/lobbyist? Yes  No

If no, please sign and date below.

If yes, please provide the following information:

Prime Contractor Firm Name: \_\_\_\_\_

Contributor or Contributor Firm's Name: \_\_\_\_\_

Contributor or Contributor Firm's Address: \_\_\_\_\_

Is Contributor:

- The Prime Contractor Yes
- Subconsultant Yes
- Agent/Lobbyist hired by Prime to represent the Prime in this RFP Yes  No

Note: Under the State of California Government Code section 4308 and California Code of Regulations, Title 2, Section 18438, campaign contributions made by the Prime Contractor and the Prime Contractor's agent/lobbyist who is representing the Prime Contractor in this RFP must be aggregated together to determine the total campaign contribution made by the Prime Contractor.

Identify the Board Member(s) to whom you, your subconsultants, and/or agent/lobbyist made campaign contributions, the name of the contributor, the date(s) of contribution(s) in the preceding 12 months and dollar amount of the contribution. Each date must include the exact month, day, and year of the contribution.

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Date: 1/23/2026

Signature of Contributor  
Jessica Fields, PE, AICP  
Director of Operations, Western U.S.  
Print Name of Contributor

TDG Engineering, Inc.  
Print Firm Name

**STATUS OF PAST AND PRESENT CONTRACTS FORM**

On the form provided below, Offeror/Bidder shall list the status of past and present contracts where the firm has either provided services as a prime vendor or a subcontractor during the past five (5) years in which the contract has been the subject of or may be involved in litigation with the contracting authority. This includes, but is not limited to, claims, settlement agreements, arbitrations, administrative proceedings, and investigations arising out of the contract.

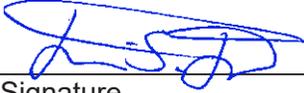
A separate form must be completed for each contract. Offeror/Bidder shall provide an accurate contact name and telephone number for each contract and indicate the term of the contract and the original contract value. Offeror/Bidder shall also provide a brief summary and the current status of the litigation, claims, settlement agreements, arbitrations, administrative proceedings, or investigations. If the contract was terminated, list the reason for termination.

Offeror/Bidder shall have an ongoing obligation to update the Authority with any changes to the identified contracts and any new litigation, claims, settlement agreements, arbitrations, administrative proceedings, or investigations that arise subsequent to the submission of the bid. Each form must be signed by an officer of the Offeror/Bidder confirming that the information provided is true and accurate.

<b>Project city/agency/other:</b>	
Not Applicable	
<b>Contact Name:</b>	<b>Phone:</b>
Not Applicable	
<b>Project Award Date:</b>	<b>Original Contract Value:</b>
Not Applicable	
<b>Term of Contract:</b>	
Not Applicable	
<b>(1) Litigation, claims, settlements, arbitrations, or investigations associated with contract:</b>	
Not Applicable	
<b>(2) Summary and Status of contract:</b>	
Not Applicable	
<b>(3) Summary and Status of action identified in (1):</b>	
Not Applicable	
<b>(4) Reason for termination, if applicable:</b>	
Not Applicable	

By signing this Form entitled "Status of Past and Present Contracts," I am affirming that all of the information provided is true and accurate.

Jessica Fields, PE, AICP  
 \_\_\_\_\_  
 Name  
 Director of Operations, Western U.S.  
 \_\_\_\_\_  
 Title

  
 \_\_\_\_\_  
 Signature  
 1/23/2026  
 \_\_\_\_\_  
 Date

Revised. 03/16/2018

**STATUS OF PAST AND PRESENT CONTRACTS FORM**

On the form provided below, Offeror/Bidder shall list the status of past and present contracts where the firm has either provided services as a prime vendor or a subcontractor during the past five (5) years in which the contract has been the subject of or may be involved in litigation with the contracting authority. This includes, but is not limited to, claims, settlement agreements, arbitrations, administrative proceedings, and investigations arising out of the contract.

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<b>Project city/agency/other:</b>	
Not Applicable	
<b>Contact Name:</b>	<b>Phone:</b>
Not Applicable	
<b>Project Award Date:</b>	<b>Original Contract Value:</b>
Not Applicable	
<b>Term of Contract:</b>	
Not Applicable	
<b>(1) Litigation, claims, settlements, arbitrations, or investigations associated with contract:</b>	
Not Applicable	
<b>(2) Summary and Status of contract:</b>	
Not Applicable	
<b>(3) Summary and Status of action identified in (1):</b>	
Not Applicable	
<b>(4) Reason for termination, if applicable:</b>	
Not Applicable	

By signing this Form entitled "Status of Past and Present Contracts," I am affirming that all of the information provided is true and accurate.

\_\_\_\_\_  
 Genoveva L. Arellano  
 Name  
 President & CEO  
 \_\_\_\_\_  
 Title

  
 \_\_\_\_\_  
 Signature  
 02/04/2026  
 \_\_\_\_\_  
 Date

Revised. 03/16/2018

**STATUS OF PAST AND PRESENT CONTRACTS FORM**

On the form provided below, Offeror/Bidder shall list the status of past and present contracts where the firm has either provided services as a prime vendor or a subcontractor during the past five (5) years in which the contract has been the subject of or may be involved in litigation with the contracting authority. This includes, but is not limited to, claims, settlement agreements, arbitrations, administrative proceedings, and investigations arising out of the contract.

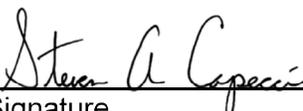
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Offeror/Bidder shall have an ongoing obligation to update the Authority with any changes to the identified contracts and any new litigation, claims, settlement agreements, arbitrations, administrative proceedings, or investigations that arise subsequent to the submission of the bid. Each form must be signed by an officer of the Offeror/Bidder confirming that the information provided is true and accurate.

<b>Project city/agency/other:</b>	
Not Applicable	
<b>Contact Name:</b>	<b>Phone:</b>
Not Applicable	
<b>Project Award Date:</b>	<b>Original Contract Value:</b>
Not Applicable	
<b>Term of Contract:</b>	
Not Applicable	
<b>(1) Litigation, claims, settlements, arbitrations, or investigations associated with contract:</b>	
Not Applicable	
<b>(2) Summary and Status of contract:</b>	
Not Applicable	
<b>(3) Summary and Status of action identified in (1):</b>	
Not Applicable	
<b>(4) Reason for termination, if applicable:</b>	
Not Applicable	

By signing this Form entitled "Status of Past and Present Contracts," I am affirming that all of the information provided is true and accurate.

Steven A. Capecci  
 Name  
Chief Operating Officer  
 Title

  
 Signature  
February 4, 2026  
 Date

Revised. 03/16/2018



# COST AND PRICE PROPOSAL



## B. COST AND PRICE PROPOSAL

### PRICE SUMMARY SHEET

Enter below the proposed price for each of the tasks described in Exhibit A – Scope of Work. Prices shall include direct costs, indirect costs, and profits.

Line Item	Task	Description	Quantity	Unit Cost	Total
1	Task 1	Project Management and Meetings	1	-	\$103,552.07
2	Task 2	Public and Stakeholder Engagement	1	-	\$308,920.31
3	Task 3	Vision, Goals, Objectives, and Metrics (VGOMs) and Baseline Data	1	-	\$231,442.80
4	Task 4	Analysis and Recommendations	1	-	\$210,902.56
5	Optional Task 4.5	Modeling	1	-	\$42,532.54
6	Task 5	Reporting	1	-	\$102,631.08
<b>TOTAL</b>					<b>\$999,981.36</b>