

Powered Micromobility Device Lending Libraries

Framework for a State Grant Program & Characteristics of Successful Programs

Final Report

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Joint Transportation Committee

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INTRODUCTION

The Washington State Legislature directed the Joint Transportation Committee (JTC) to examine options and provide recommendations for: “...a state program to assist with the establishment of powered micromobility device lending libraries. The purpose of the powered micromobility device lending libraries is to provide low-cost or no-cost, reliable, and healthier modes of transportation to vulnerable communities. It is anticipated that the powered micromobility device lending libraries would be managed by community nonprofit organizations, local governments, higher education institutions, school districts, or federally recognized tribal governments. The options that should be examined include, but are not limited to: A state-funded grant program for the purchase of powered micromobility devices to be used in powered micromobility device lending libraries, direct technical assistance for establishing community-based powered micromobility device lending libraries, and direct-to-consumer incentives to applicants to purchase powered micromobility. Recommendations must specify how to prioritize program benefits for vulnerable populations and overburdened communities, including tribes, seniors, low-income populations, and communities with high environmental burdens. Powered micromobility devices to be examined by this study are devices that do not exceed product speed of 30 miles per hour or product weight of 100 pounds and include electric bicycles, electric cargo bikes, electric standing scooters, and other mobility devices under 50 pounds in weight that do not use fossil fuels.” (Legislature, 2022)

This report explores the possible framework for a state grant program and characteristics of successful powered micromobility device lending library (PMDLL) and incentive programs, noting insights gained from an extensive literature review and interviews with those currently and formerly operating programs in the United States. The characteristics identified in the report address several broad categories: program model options; initial set-up; ongoing operations and administration; approaches to reach vulnerable populations and overburdened communities; and purchase incentives.

There are limited publicly available details on PMDLL programs, and so this report relies heavily on interviews with practitioners and funders. Those with experience in this arena have been generous with their time and expertise and are noted in the Acknowledgements section at the end of this report.

Report methodology

The information contained in this report was obtained through staff interviews and a review of online and print resources from various sources, including:

- US Department of Transportation, Federal Highway Administration
- National Conference of State Legislatures (NCSL)
- National Association of City Transportation Officials (NACTO)
- Portland State University, Transportation Research and Information Center
- Washington State Department of Transportation, Active Transportation Division
- City of Denver
- Waterside Workshops

- City of Berkeley
- Grid Alternatives
- Shared Mobility Inc.
- Western Washington University
- Lime

Details on online and print sources used in this report can be found in the References section at the end of this report.

EXECUTIVE SUMMARY

In the past decade, lending libraries have taken on new collections beyond traditional books to serve communities. During a similar timeframe, the availability and use of e-bikes, e-scooters, and e-cargo bikes has grown dramatically. Additionally, various entities (including non-profits, universities, cities, etc.) have stood up e-bike lending libraries over the past several years with a variety of funding sources.

This study was centered on examining options and providing recommendations for a state program that could assist with the establishment of powered micromobility device lending libraries (PMDLL) and direct-to-consumer incentives for PMDLL users to purchase powered micromobility devices¹. This report explores “promising practices” that are defined as having been used successfully in at least one program to establish, meet, or exceed the goals initially set by the program. Staff interviewed practitioners and funders to gather information on current practices used successfully around the country for PMDLL and incentive programs. Web and print resources with details on PMDLL are limited. A prior study on PMDLL generally as well as sources of best practices identified for PMDLL could not be found. Incentive programs are now extensive throughout the world, and good research including suggested program framework is available on this topic and referenced within this report.

The entities interviewed for this study were asked to be thorough and candid and therefore all interviews were off-the-record. Each recommendation and characteristic is not applicable to any one interview or source. Those that were interviewed were well versed on the topic, provided deep insights, and gave of their time with no compensation. They are listed in the Acknowledgements section.

¹ Powered Micromobility Devices for the purposes of this study are defined as devices that include electric bicycles, electric cargo bicycles, and electric standing scooters weighing 100 pounds or less that do not use fossil fuels. The other category of powered micromobility device identified in the proviso (“other mobility devices under 50 pounds in weight that do not use fossil fuels”) was not discovered in research related to PMDLL or incentive programs.

BACKGROUND

Powered Micromobility Devices

The Federal Highway Administration broadly defines micromobility as any small, low-speed, human- or electric-powered transportation device, including bicycles, scooters, electric-assist bicycles, electric scooters (e-scooters), and other small, lightweight, wheeled conveyances. For purposes of this report, the focus is upon powered micromobility devices including e-bikes, e-cargo bikes, and e-scooters, weighing 100 pounds or less. (Price, Blackshear, Blount, & Sandt, 2021) (Legislature, 2022)

E-bikes (including e-cargo bikes) and e-scooters are presently widely available throughout the United States for sale from retailers, in both brick-and-mortar as well as online stores. Between 2018 and 2021, the number of e-bikes sold annually in the U.S. increased from less than 300,000 to over 1 million. Much of this growth was due to the COVID pandemic “bike boom”, yet e-bike growth continued through 2021, while conventional bicycle sales returned to historic rates. E-scooter sales figures are hard to estimate, but most estimates indicate e-scooter sales are between 5-10% of e-bike sales. (Bennett, MacArthur, Cherry, & Jones, 2022)

E-bikes and e-scooters are also available for loan through shared service operated by private entities and local governments in dozens of regions across North America. Often jurisdictions where the shared services operate have requirements for that service operator to provide low-income residents free or reduced-fare rides. These details are handled by the jurisdiction and shared service provider through contracts. Shared service ridership on e-bikes and e-scooters has grown consistently since 2010, with 65 million trips in 2020 and 112 million trips in 2021. (North American Bikeshare and Scootershare Association (NABSA), 2023) (National Association of City Transportation Officials (NACTO), 2022)

Lending Libraries

In recent decades, the definition of a lending library has expanded beyond books. Traditional book lending libraries in cities throughout the US now loan tools, craft supplies, electronics, cooking implements, artwork, toys, telescopes, and other rare and/or expensive items. Additionally, non-profits have developed lending libraries that serve their communities. (Williamson, 2014)

Powered Micromobility Device Lending Libraries (PMDLL)

Powered micromobility device lending libraries (PMDLL) are most often a program of a non-profit with a biking focus. These PMDLL are mainly funded by non-profits, utility companies, and state and local governments. PMDLL, though not widespread, have been established throughout the United States. In recent years, public funding that can be utilized for PMDLL has become available through low-carbon grant programs, many of which have been funded by taxation of carbon emissions. PMDLL are often an eligible recipient category for these grant programs. (Transportation Research and Education Center, Portland State University, 2022)

The Portland State University Transportation Research and Education Center maintains the E-Bike Incentive Programs of North America Tracker which has vast information on powered micromobility programs throughout the U.S. and Canada, including details on e-bike lending libraries.

PMDLL in Washington State

Included in the 2023-25 biennial transportation budget (chapter 472, Laws of 2023 (ESHB 1125)) is funding for the Washington State Department of Transportation (the department) to: “...establish an e-bike lending library and ownership grant program. The department may accept grant applications from other state entities, local governments, and tribes that administer or plan to administer an e-bike lending library or ownership program for their employees for commute trip reduction purposes. The department may also accept grant applications from nonprofit organizations or tribal governments that serve persons who are low-income or reside in overburdened communities and that administer or plan to administer an e-bike lending library or ownership program for qualifying persons.² Grant recipients must report program information and participation data to the University of Washington...”

FRAMEWORK FOR A STATE PROGRAM

Research through interviews and print resources for this study provided the opportunity to find common success attributes in a variety of program types and models that are utilizing powered micromobility devices. At present, there is not a state with a state-run grant program specific to PMDLL. Washington State will be the first. In addition, grant program attributes of existing Washington State WSDOT Active Transportation grant programs and grant programs in other parts of the country related to powered micromobility were evaluated. Three overarching categories of recommendations and considerations for a state grant program are explored below.

1. Supportive administration

Interviews with people from all types of program models indicated that effective PMDLL programs begin with clear expectations and roles for the participants, the host organization (grantee), and funder (grantor). This clarity should be reflected in the master grant application and its supporting documents created by the grantor. Those documents generally outline which components and at what level of detail the grantor requests the potential PMDLL program should be explained within the application. Requesting specific details rather than broad ideas is ideal. In addition, the grantor should provide technical support (through a bidders’ conference, one-on-one consults, etc.) to review potential options for the various program categories (noted in the next section). This technical support helps ensure the proposed program is viable before the application is submitted. Outreach to organizations that could be well suited to establishing a PMDLL is also something to consider. Scoring categories for the application should be clearly laid out in a rubric and be available to potential grantees at the time of application. A scoring category (or categories) related to program benefits for vulnerable populations and overburdened communities, including tribes, seniors, low-income populations, and communities with high environmental burdens should help prioritize these

² Article VII, section 5 of the Washington state constitution prohibits a gift of public funds. The purpose of the prohibition is to “prevent [public] funds from being used to benefit private interests where the public interest is not primarily served.” *Japan Line, Ltd. V. McCafree*, 88 Wn.2d 93, 98 (1977). In determining whether an expenditure amounts to a gift of state funds, courts utilize a two-step approach. First they examine (1) whether the expenditure carries out a fundamental purpose of the government and if not, (2) the court focuses on the consideration and donative intent. The support of Commute Trip Reduction programs and the support of low-income persons are areas where the state currently provides public support to private individuals.

applications for funding. A state grant program should also avoid setting requirements that create high burdens that may prevent potential applicants from being viable (for example, requiring small non-profits to hold large amounts of liability insurance), to the extent practicable.

2. Community centered

Successful programs with strong utilization begin with setting community centered goals to identify the appropriate program model and to construct a detailed implementation plan. Categories within the scoring rubric of a grant application should consider several aspects to ensure it is a community centered proposed program. Attributes such as collaboration, demonstrated need, population served, and local support could be scored. For example, an applicant that has both community-based expertise and bike know-how combined with serving an area with high density where parking is a problem and the availability of other transportation options is low, and a local business partner that has a secure building/location to house the e-bikes and host the PMDLL site would rank high.

3. Flexibility

There is not a one-size-fits-all model for successful PMDLL programs, and most encounter challenges along the way to implementation. However, several program operators indicated those grantors that allow the grantee to be nimble, recover from “failure” or a “dead end”, and have a moveable end date (if applicable) will also allow the grantee to be innovative in problem solving as the program gets underway. This should be paired with a hard deadline for the initial program launch, to ensure the grant funds are being utilized for the intended purpose.

CHARACTERISTICS OF SUCCESSFUL POWERED MICROMOBILITY PROGRAMS

This section aims to provide promising practices for PMDLL grantees and grantors to consider.

Potential grantees considered for the purposes of this study are community nonprofit organizations, local governments, higher education institutions, school districts, or federally recognized tribal governments. The information in this section was gathered from interviews conducted with currently operating and closed PMDLL programs.

I. Program models

Program goals will help determine the program model that may be most effective. Program goals typically center around serving one of three purposes:

- a) Provide an opportunity for people in a community to test ride a powered micromobility device (device) for a set duration, with the intention of reducing barriers to purchasing a device
- b) Create community access to a low/no cost form of transportation
- c) Offer an extended lending period or create an “earn-a-bike” device program so that devices are utilized ongoing as an alternative to cars, for work and other transportation needs

In addition, operating a PMDLL with goals that center around job training or providing an internship can provide additional benefit. Defining the program goals and program model at the outset of the

project is important to inform the initial set-up and ongoing administration of the PMDLL. More details are explored below.

II. Initial Set-up

Key elements of PMDLL programs include the following:

- Establish a goal and choose a program model (see Section I above)
- Liability insurance
- Device purchase
- Device maintenance & repair
- Clear parameters for participation
- Tracking of metrics and data
- User agreement
- Staff time dedicated to operations

1. Liability insurance

Identifying the owner of the devices is important at the outset of the project. PMDLLs are often grouped in with e-bike and e-scooter shared services for purposes of liability insurance, which is quite costly. For this reason, it is important to consider ownership of the devices upfront - whether it is the funding entity, the organization operating the program, or the individual using the device (especially in an “earn-a-bike” program model). Once ownership is established, it is helpful to have the funding entity or organization operating the program utilize an existing insurance provider to see if bundling with its existing liability insurance is feasible in reducing costs, and to get quotes from other providers to use for comparison.

2. Device Purchase

When purchasing devices for the PMDLL, the grantee should consider best value over initial purchase price. Ease of maintenance and repair should be at the forefront of any purchase decision. Additionally, the type of device best suited to the target population, ease of removing the battery, locking mechanism for the battery, location of the battery (to assist with centering weight), and longevity of the equipment should all be evaluated. Whether or not these devices would also be available for ultimate purchase and/or ownership is also a factor in choosing the type and manufacturer. For example, while most bike shops now offer repair on e-bikes, they are not guaranteed to fix all makes and models or be able to acquire parts for all makes and models. To ensure a long lifecycle of the device, this limitation should be thoroughly investigated at the start of the project. An additional lifecycle consideration is the potential future home of the device (and how that would need to be facilitated) as it approaches end-of-life, or if the program has a known limited duration (for example, a pilot project for a period of only a year or two).

3. Device maintenance & repair

The entity purchasing the devices should establish a plan for maintenance and repair at the time of device purchase. This could include establishing a contract with a local bike shop, engaging a non-profit or job training program that provides this service, or purchasing a maintenance and repair contract

from the retailer that is selling the device. It is also critical to consider and establish parameters for the maintenance and repair plan. For example, will the technician go to where the bike is, or require the bike be transported to a shop; will the user or the program operator request the maintenance or repair; what is the promised turn-around on maintenance and repairs, etc.?

4. Clear parameters for participation

Indicating the parameters for participation is helpful to communicate with potential users upfront. These categories may include, and are not limited to: age; affiliation/residence; income; cost/security deposit; storage requirements; required data collection and surveys; smartphone access/utilization (for data collection); experience riding bicycles; and mandatory orientation.

If there is an eligibility requirement, state that and how the applicant can prove their eligibility. For example, if they must live in a certain jurisdiction, indicate the types of address verification that is accepted (utility bill in their name, rental agreement in their name, etc.). If they must meet an income threshold, identify the types of programs they may already be qualified for that could be utilized to verify income (i.e. Apple health, SNAP benefits, etc.).

5. Tracking of metrics and data

Defining the data and metrics that would be valuable for any research component of the program is critical to identify before opening it up to users. Some data considerations are: requiring users to upload travel data when utilizing the device (and addressing any privacy considerations); committing to a series of surveys while they utilize the device (at initial checkout, during loan period, at return); and tracking mileage (if not engaging a geographical tracking application). Make certain these meet the reporting requirements for the grantor. These requirements should also be included in the User Agreement.

6. User agreement

The User Agreement should provide clear written parameters for participating in the program. This includes, but is not limited to: any security deposit required and when and under what circumstances it will be refunded; details on the information that will be collected from the user while using the device; the requirements for storage of the device (type of lock(s), removal of battery, secure space, etc.); expectations for maintenance and repairs (who should these be performed by and who is responsible for the cost); duration of lending period; and any check-ins required during the lending period (with or without the device present). In programs that offer an ownership component, there may be so much demand that an application process should also be engaged, and a lottery for selection of users/owners.

7. Staff time dedicated to operations

Identify staff or volunteers that are needed to administer the program according to the parameters set. For example, if the PMDLL devices will be available for check-out only once each week, volunteers could staff that type of PMDLL. If the PMDLL will be open for 7-day/week check-outs/check-ins, a full or half-time paid staff is likely required. In addition to the check-in/check-out function, there is: the logistics of set-up at that site; consideration of training the user on that particular device; fielding

questions that come up while the device is with the user; arranging maintenance and repairs (both planned and unexpected); collecting and entering of data; as well as meeting the reporting requirements for the funder.

III. Ongoing Operations & Administration

The basic operations for a PMDLL are noted above in Section II, item 7. In addition, ongoing success also depends upon having a program that the community is excited about and has use for during the duration of the program. One of the ways to achieve this is through marketing of the program. It is an often overlooked and enormously successful way to ensure the program is reaching the target audience. Calling upon community partners is the most effective, simplest, and often least expensive way to go about getting the word out about the program. That said, hiring staff to work as an ambassador for the program is also effective and can maximize utilization to create broader program success.

IV. Approaches to reach vulnerable populations and overburdened communities

Those that already serve and have established relationships within a community are a good choice generally for hosting a PMDLL. Programs administered by community-based organizations (CBO) are often very effective in reaching vulnerable populations and overburdened communities. The CBO having or developing bike knowledge or partnering with a bike focused entity on the program maximizes success. The bike focused entity could be another non-profit, transit agency with bike program focus, or a bike shop. Key support these biking entities provide include biking know-how and instruction, bike maintenance and repair (either performed for free, a fee, or through teaching participants bike maintenance and repair), and organizing rides.

Reaching vulnerable populations and overburdened communities is often best achieved through engaging a local community based organization (CBO).

Partnership with a bike focused organization maximizes benefits.

To encourage successful partnerships, a scoring category (explored also in the Framework For A State Program section) that addresses this in grant applications is a way of supporting and counting this benefit to the potential program. To ensure the program is serving the intended population, grantees and the grantor should consult the resources provided by the [Environmental Justice Council](#), the [Washington State Health Disparities Map](#), and the [Washington State Overburdened Communities Map](#). Census data could also be utilized.

V. Purchase Incentives

Purchase incentives are currently offered by utility companies/power districts, local and state governments, nonprofits, private entities, and air quality management authorities. In May 2022, a White Paper was published by the Portland State University Transportation Research and Education Center (TREC) with significant resources and details on strategies to reach a broad population and maximize benefits for targeted purchasers. A summary is noted below and additional tools from the White Paper are included in the Resources section at the end of the report. Additional research

utilizing a public survey to identify optimal thresholds for incentives is envisioned but has not yet been completed.

The TREC study identified 75 e-bike incentive programs (including pilot, active, and closed) in the U.S. and Canada to evaluate. It was discovered that purchase incentives are most often provided as cash incentives either as post-purchase rebates or point-of-sale discounts. Incentive amounts range from \$100 to \$1,365 for the general public, and the majority of incentive program benefits fall within the \$200-600 range. Many programs offer a higher incentive amount for income-qualified applicants.

Interviews were conducted with program managers, industry leaders, and academics to develop a set of recommended practices and considerations for program design. Major recommendations were:

- Include as wide a variety of e-bike model choices as possible;
- Consider higher incentives for those that are income-qualified and for higher cost bikes (e.g., cargo e-bikes);
- Include online retailers as an option for purchase within the program;
- Encourage strategic partnerships, which are likely a catalyst for success; and
- A focus on evaluation at the outset of the program will help ensure the ability to later assess operations and the effectiveness of the program, compared to initial goals

(Bennett, MacArthur, Cherry, & Jones, 2022)

DEFINITIONS

Lending Library a library from which materials are lent (Merriam-Webster Dictionary)

Micromobility Device small, low-speed, human- or electric-powered transportation device, including bicycles, scooters, electric-assist bicycles, electric scooters (e-scooters), and other small, lightweight, wheeled conveyances. (USDOT definition)

Overburdened Community means a geographic area where vulnerable populations face combined, multiple environmental harms and health impacts, and includes, but is not limited to, highly impacted communities as defined in RCW 19.405.020. ([RCW 70A.02.010](#) (11))

Powered Micromobility Device includes electric bicycles, electric cargo bicycles, and electric standing scooters weighing 100 pounds or less that do not use fossil fuels. The other category of powered micromobility device identified in the study proviso (“other mobility devices under 50 pounds in weight that do not use fossil fuels”) was not discovered in research related to Powered Micromobility Device Lending Libraries or incentive programs. (study definition)

Promising Practices are defined as having been used successfully in at least one program to establish, meet, or exceed the goals initially set by the program (similar to U.S. federal agency program guidelines)

ACKNOWLEDGEMENTS

Special thanks to the following people (noted in alphabetical order) for lending their expertise to this study:

Barb Chamberlin, Director, Active Transportation Division, Washington State Department of Transportation (WSDOT)

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Michael Galligano, CEO, Shared Mobility, Inc.

Beth Hartsoch, Associate Director of Western Washington University's (WWU) Office of Institutional Effectiveness (formerly faculty advisor to WWU's PMDLL pilot project, which concluded in 2018)

Hayden Harvey, Senior Manager, Government Relations PNW, Lime

Neil Larsen, Executive Director, Waterside Workshops

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Douglas Shinkle, Associate Director, Environment, Energy & Transportation, National Conference of State Legislatures (NCSL)

Brian Wood, Active Transportation Programs Specialist, Active Transportation Division, Washington State Department of Transportation (WSDOT)

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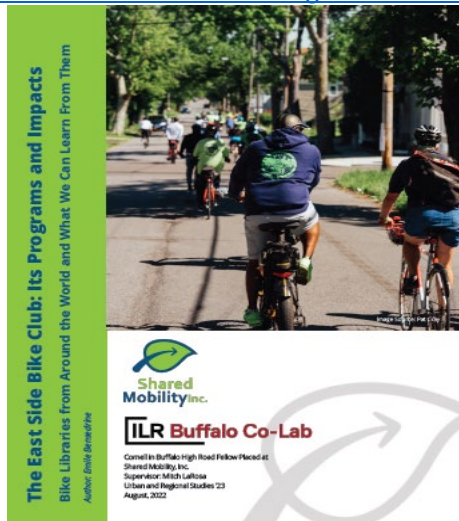
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RESOURCES

Thank you to the programs and people that shared a wide variety of resources that may be useful to those exploring PMDLL. The resources noted below are organized into three categories: research; templates; and articles and websites of interest.

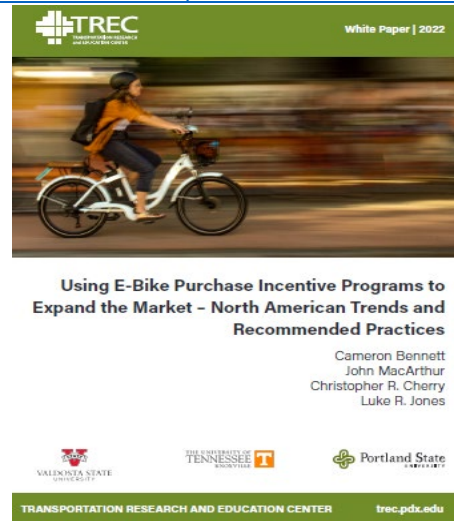
RESEARCH

[Shared Mobility Inc. IRL Buffalo Co-Lab report on The East Side Bike Club: Its Programs and Impacts](#)



Report published August 2022

[E-Bike Research, Transportation Resource and Education Center, Portland State University](#)



Report published May 2022

[USDOT FHWA Shared Micromobility and Equity Primer](#)

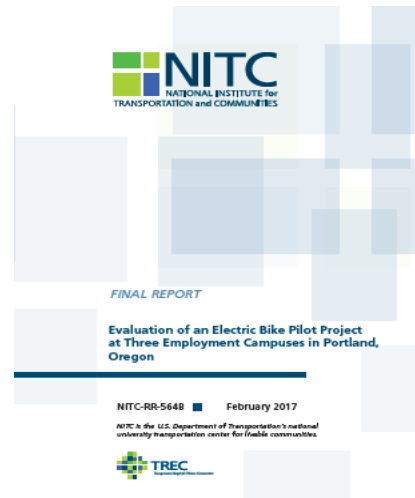


Shared Micromobility and Equity Primer



Last updated May 2022

[National Institute for Transportation and Communities – Evaluation of an Electric Bike Pilot Project at Three Employment Campuses in Portland, OR](#)



Report published February 2017

[E-bike Incentive Programs of North America Tracker](#)

TEMPLATES

Western Washington University (WWU) E-bike lending library pilot project examples –

- [E-bike training ideas](#)
- [E-bike orientation](#)
- [E-bike demo how-to](#)
- [Frequently Asked Questions \(FAQ\)](#)
- [How You Can Ride](#)

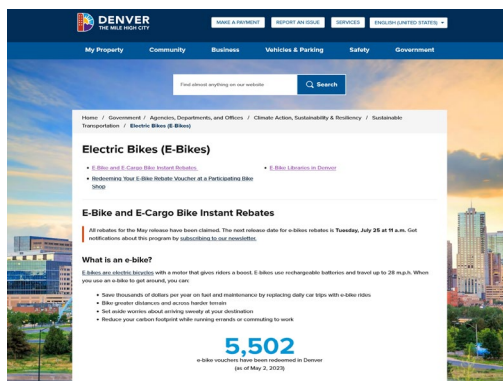
Application prioritization equity scoring example from Washington State Department of Transportation (WSDOT): SAMPLE – Grant Program Equity Consideration - **see Appendix**

City of Berkeley Pilot Climate Equity Fund Programs: SAMPLES – Request for Proposals (RFP) and Contract for micromobility equity project – **see Appendix**

[TREC PSU Recommended Practice for Incentive Program Design](#) – see pages 4-6 of the *Using E-Bike Purchase Incentive Programs to Expand the Market – North American Trends and Recommended Practices* report

ARTICLES & WEBSITES OF INTEREST

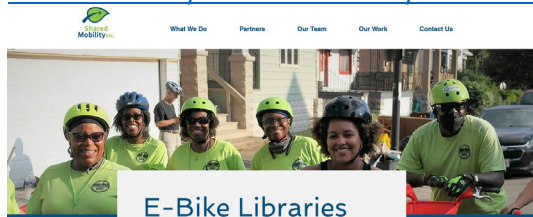
[Denver Electric Bike Incentive and Libraries program](#)



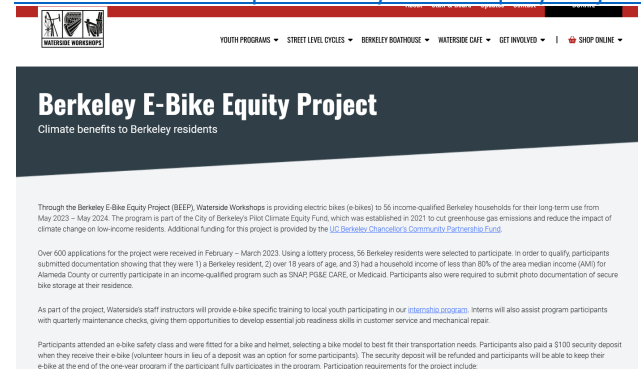
[Western Washington University Viking E-Bike Data and findings from the two-year pilot project](#)



[Shared Mobility Inc. E-Bike Library Initiatives](#)



[Waterside Workshops Berkeley E-bike Equity Project](#)



[City of Oakland Electric Bike Lending Pilot Program – Community Engagement Report](#)

City of Oakland Electric Bike Program: Community Engagement for Program Design: Results 2022



Better Bike Share Partnership [Community Ambassadors Make a Difference](#)



[Madison BCycle Community Pass Program](#)

Madison BCycle Community Pass Program

Madison BCycle Community Passes are back! Stop by your local Madison Public Library to check out a pass and a bike helmet.

The program, in partnership with the Madison Public Library Foundation, enables riders to use their Madison Public Library card to access one of over 350 electric bikes.



Left to right: Library Director Greg Nickola, Madison BCycle General Manager Helen Bradley, Library Board President Eve Galanter, Foundation Executive Director Jenni Jeffress.

[Local Motion E-bike Lending Libraries](#)

HOME / PROGRAMS / E-BIKE LENDING LIBRARIES

E-Bike Lending Libraries



BIKE RENTALS ▾ BIKE FERRY RESOURCES ▾ PROGRAM:



[Shared scooter services in Seattle, WA - Seattle Times](#)

Business | Health | Local News | Northwest | Traffic Lab

What Seattle learned from one year of electric scooters

April 26, 2022 at 6:00 am | Updated April 21, 2022 at 3:30 pm



1 of 3 | A rider waits for the signal to change after renting a scooter April 12 in front of the Space Needle. SDOOT released a one-year evaluation of its scooter pilot. (Ben M. Brannen / The Seattle Times)

[People for Bikes, electric-bikes: Electric Bicycles Meet Equity in Upstate New York](#)

Electric Bicycles Meet Equity in Upstate New York

By: Kiran Herbert, PeopleForBikes' content manager



NOTE: All resource links are active at the time of publishing (June 2023). If they are not active at a later date, please contact staff at the JTC for electronic file copies of these resources.

Pedestrian and Bicycle Program and Safe Routes to School Program
2022 Review Equity Criteria Weighting Consideration

Equity Up to 20% Consideration

For PBP projects – Equity was evaluated based on socioeconomic and disability ranking data from Washington Tracking Network for the census tracts the projects were in (in part or whole, and using the data from tracts showing the highest equity concerns when the project spanned census tracts)

The socioeconomic factors ranking was a compilation of seven subfactors and disability represented a single subfactor, so a weighted total was used. Based on the 1 to 7 ratio, the socioeconomic factors ranking was weighted 87.5% and disability was weighted 12.5%. Quintiles were then computed from the weighted totals of all the projects:

- Quintiles 1 and 2 received 1 point of consideration.
- Quintile 3 received 10 points of consideration.
- Quintile 4 received 15 points of consideration.
- Quintile 5 received 20 points of consideration.
- Projects on tribal land receive the maximum consideration of 20 points

For SRTS projects using OSPI Report Card data, consideration would be given in the following way. Set quintile values based on the percent of the population that are:

- Students of color
- Students with a Hispanic heritage
- Low Income
- Students with disabilities
 - 20 pts consideration for top quintile for any category, 3 of 4 categories that are in the second highest quintile, second highest quintile for students with disabilities or on tribal land,
 - 15 pts consideration for 2 of 4 categories in second highest quintile,
 - 10 pts consideration for 1 of 4 categories in second highest quintile,
 - 1 pt consideration for all others

Note: Consideration will be given to equity information provided by the applicant in the open-ended question. WSDOT staff will conduct site visits with the top-ranking applicants before the prioritized list is finalized. During that time, they reserve the ability to adjust the equity score based on what they find at the site visits. This will be a subjective call and only 4 points up or down would be added or subtracted based on the site visit. This is especially important where the census track or school data do not adequately represent the project location.



Finance Department
General Services Division

REQUEST FOR PROPOSALS (RFP)
Specification No. 22-11488-C
FOR
Berkeley Pilot Climate Equity Fund Programs
PROPOSALS WILL NOT BE OPENED AND READ PUBLICLY

Dear Proposer:

The City of Berkeley is soliciting written proposals from qualified firms or individuals for one (1) or more of the Pilot Climate Equity Fund programs for low-income community members related to resilient retrofits for homes, increased access to electric bikes or other forms of electric micro-mobility, and providing access to resilience measures and electrification engagement. Budgets are requested as part of the proposal, but price is not included in the selection criteria for this Request for Proposal (RFP) (Section IV).

The project scope, content of proposal, and vendor selection process are summarized in the RFP (attached).

Proposals must be received no later than 2:00 pm, on Tuesday, January 25, 2022. Proposals are to be sent via email with the subject “**Berkeley Pilot Climate Equity Fund Programs**” and **Specification No. 22-11488-C** clearly indicated in the subject line of the email. Please submit one (1) PDF of Attachment J - Proposal Application, and all other required attachments.

Email Proposals to:

City of Berkeley
Finance Department/General Services Division
purchasing@cityofberkeley.info

Proposals will not be accepted after the date and time stated above. Incomplete proposal or proposals that do not conform to the requirements specified herein will not be considered. Issuance of the RFP does not obligate the City to award a contract, nor is the City liable for any costs incurred by the proposer in the preparation and submittal of proposals for the subject work. The City retains the right to award all or parts of this contract to several bidders, to not select any bidders, and/or to re-solicit proposals. The act of submitting a proposal is a declaration that the proposer has read the RFP and understands all the requirements and conditions.

For questions concerning the anticipated work, or scope of the project, please **contact Billi Romain, Manager, Office of Energy & Sustainable Development**, via email at electric@cityofberkeley.info no later than **January 7, 2022**. Answers to questions will **not** be provided by telephone or email. Answers to all questions or any addenda will be **posted** on the City of Berkeley’s site at <http://www.cityofberkeley.info/ContentDisplay.aspx?id=7128>. It is the vendor’s responsibility to check this site. For general questions concerning the submittal process, contact purchasing at 510-981-7320.

We look forward to receiving and reviewing your proposal.

Sincerely,

Darryl Sweet
General Services Manager

I. INTRODUCTION

The City of Berkeley (the City) established a Pilot Climate Equity Fund to provide climate and resilience benefits to low-income residents in Berkeley through programs that support building and transportation electrification. While low-income households typically have low greenhouse gas (GHG) emissions, they often bear the greatest burdens of a changing climate. The purpose of this funding is to maximize equitable GHG emissions reductions and climate adaptation and resilience benefits for income qualified households. The City seeks a qualified organization(s) or team(s) to deliver climate equity programs that provide meaningful benefits to low-income residents in Berkeley in one (1) or multiple of the Program Areas defined within the Scope of Services. Proposals should be consistent with the goals of the Equity Guardrails developed as part of Berkeley's Existing Buildings Electrification Strategy¹ (BEBE Strategy), described below.

- **Maximize Access to Health, Safety & Mobility Benefits:** Proposed projects should prioritize the benefits of building and transportation electrification including health, safety, and comfort to those most impacted by climate change.
- **Maximize Access to Economic Benefits:** Proposed projects should leverage incentives and financing, reduce costs when possible, and support high-road job opportunities when possible.
- **Maximize Ease of Participation:** Proposed projects should be easy for all community members to access, and should be integrated with other programs and services when possible.
- **Promote Housing Affordability & Anti-Displacement:** Proposed programs should support housing preservation and tenant protections, and not displace renters or homeowners.

II. SCOPE OF SERVICES

Projects and proposals within the Program Areas below should be designed to enhance community resilience, reduce GHG emissions, and address the Equity Guardrails. Proposers may respond to one or more of the scope of services programs outlined below by completing *Attachment J – Berkeley Pilot Climate Equity Fund Proposal Application*. The intent of this solicitation is to award at least one project in each Program Area. The City reserves the right to modify the scope of the projects and may award more or less funding than specified in the Program Areas. The term for these programs is two years from contract execution.

The goal of the Pilot Climate Equity Fund Programs is to support building decarbonization and transportation modal shifts that enhance community resilience. Proposed projects should seek to maximize the number of community members actively engaged and households served.

Program Areas:

The three Program Areas can be found below with relevant eligibility requirements for each category. Eligibility requirements vary for each Program Area.

1. Resilient Home Retrofit Pilot

The Resilient Home Retrofit Pilot seeks to support building decarbonization that enhances resilience, supports occupants and reduces GHG emissions. The BEBE Strategy identified home repair and maintenance needs that accompany building electrification as a major challenge to decarbonizing existing residential buildings in Berkeley. While there are some resources to support these repairs for income-qualified homes, it is difficult for low-income residents to access multiple programs that have different application processes and eligibility requirements. This program area seeks to demonstrate how retrofit funding available to income-qualified households can be combined with other programs to leverage greater benefits.

¹ The Equity Guardrails, a concept developed as part of Berkeley's Existing Buildings Electrification Strategy, act as minimum standards that must be met for any proposed electrification policy to be considered. See report for more information: https://www.cityofberkeley.info/uploadedFiles/Planning_and_Development/Level_3_-_Commissions/Commission_for_Energy/EC2021-10-27_Item%208_Berkeley%20Existing%20Building%20Electrification%20Strategy.pdf

Proposed projects should integrate electrification and energy efficiency measures with other income-qualified housing improvement programs serving low-income households in single family and/or multifamily buildings. Homes being served must be in Berkeley. Examples of eligible expense for this program area include labor and equipment for building envelope improvements, solar photovoltaic systems, induction ranges, heat pump water heaters, and/or heat pump air space heating/cooling, and related work for buildings with income-qualified residents.

Selected proposers will request funding based on specific scopes of work, which will be reviewed by the City. Once approved, projects may receive partial funding in advance with the balance reimbursed upon completion. Funding for approved projects will be drawn down from the total amount of dedicated funding for this program area. Total funding available for Program Area #1 is \$250,000.

Eligible applicants for Program Area #1: Resilient Home Retrofit Pilot include organizations that provide rehabilitation, capital improvements, weatherization, and/or energy services for income-qualified single and/or multifamily housing.

2. *Electric Mobility Access Pilot*

The Electric Mobility Access Pilot seeks to enhance mobility for low-income community members in ways that reflect community priorities and support modal shifts. Goals for this program area are consistent with those of the *Berkeley Electric Mobility Roadmap*²:

- Ensure equity in access to electric mobility
- Improve alternatives to driving
- Achieve zero carbon emissions

Proposed projects should demonstrate how increased access to bicycles, electric bicycles, electric scooters, or other forms of micromobility can support low-income residents in Berkeley. Examples of eligible expenses for this program area include costs related to community engagement and partnership, equipment purchases, operating costs, printing materials, community events, and/or staff time for program design and implementation.

Total funding for Program Area #2 is \$250,000. Budgets must be itemized.

Eligible applicants for Program Area #2: Electric Mobility Access Pilot include community-based organizations serving income-qualified community members.

3. *Community Access to Resilience Measures and Electrification Engagement Pilot*

Communities of color and other historically marginalized people continue to suffer harms from racism and other forms of oppression, including increased risks of experiencing the impacts of climate change first and worst. The objective of the Community Access to Resilience Measures and Electrification Engagement Pilot is to meaningfully engage low-income community members in Berkeley to amplify their voices, elevate their experiences and build their capacity to collaborate as partners in developing and implementing climate change and resilience solutions.

Proposed projects should demonstrate ways to build capacity and resilience in low-income communities, and provide access to measures and resources that address priorities that they have identified. Examples of eligible expenses in this program area include:

- Providing access to resilience measures through the purchase and distribution of electrification and resilience resources and equipment such as induction cooktop hobs, portable batteries, air purifiers, transit passes, shared electric mobility memberships, etc.
- Conducting outreach, education and community engagement to build relationships and identify community priorities around health, transportation, air quality, etc.
- Building capacity for organizations and individuals representing low-income communities to

² Berkeley's *Electric Mobility Roadmap* was adopted by the Berkeley City Council on July 21, 2020.
https://www.cityofberkeley.info/uploadedFiles/Planning_and_Development/Level_3_-_Energy_and_Sustainable_Development/City%20of%20Berkeley%20Electric%20Mobility%20Roadmap_2020.pdf

engage around climate and resilience by providing mini-grants or stipends.

Total funding for Program Area #3 is \$100,000. Budgets must be itemized.

Eligible applicants for Program Area #3: Community Access to Resilience Measures and Electrification Engagement Pilot include community-based organizations serving income-qualified community members in Berkeley.

Optional Virtual Bidders' Conference:

The City will hold at least one optional virtual bidders' conference prior to the proposal submission due date to answer questions. All questions and answers will be provided publicly on the City's website. For more information on the virtual bidders' conference, see <https://www.cityofberkeley.info/RFP/>, and scroll to RFP 22-11488-C. The first virtual bidders' conference will take place on December 13, 2021 at 4 PM.

Join Zoom Meeting: <https://us06web.zoom.us/j/89300657612>

Meeting ID: 819 7118 3833

One tap mobile

+16699006833,,81971183833# US (San Jose)

+13462487799,,81971183833# US (Houston)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 346 248 7799 US (Houston)

+1 253 215 8782 US (Tacoma)

+1 929 205 6099 US (New York)

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

888 788 0099 US Toll-free

833 548 0276 US Toll-free

833 548 0282 US Toll-free

877 853 5247 US Toll-free

Meeting ID: 819 7118 3833

Find your local number: <https://us06web.zoom.us/j/89300657612>

If another bidders' conference is deemed necessary, the City will amend the RFP to provide notice of another meeting prior to the proposal submission due date.

The anticipated timeline for this RFP and program implementation can be found below. Please note these dates are subject to change.

Timeline

	2021		2022				2023/24
	Nov	Dec	Q-1	Q-2	Q-3	Q-4	
Issue Request for Proposals		Issued 12/3/2021	Due 1/25/22				
Bidders' Conference		12/13/21					
Select projects				City Council			
Execute contracts							
Implement programs							

III. SUBMISSION REQUIREMENTS

All proposals shall provide information in *Attachment J: Berkeley Pilot Climate Equity Fund Proposal Form*. A proposal in any other format or document other than *Attachment J* will not be accepted. All proposers shall complete Section A - Mandatory Questions, and complete any applicable program area(s) in Sections B, C, and/or D of *Attachment J*. The proposal should be concise. Please see *Appendix A* to this RFP for the checklist of items for proposal submission.

IV. SELECTION CRITERIA

Proposals will be evaluated according to the criteria below:

- 1. Organization or Team's Capacity and Readiness to Proceed** **Up to 23 points**
 - Organization/team has successful track record collaborating with and providing services to low-income and other marginalized communities
 - Organization/team has experience with building and/or transportation electrification
 - Organization/team has the staffing capacity necessary to complete the project
- 2. Program Feasibility** **Up to 26 points**
 - Proposed program can reasonably be completed within the two-year program term
 - Proposed program integrates with existing programs serving income-qualified communities
 - Proposed program leverages other funding sources (e.g. state, federal, or regionally-funded programs)
 - Proposed program demonstrates effective solutions and may be replicated at a larger scale
- 3. Engaging Communities** **Up to 23 points**
 - Proposed program addresses priorities and needs identified by low-income community members
 - Proposed program builds capacity in low-income communities to engage in climate program development and implementation
- 4. Community Benefits** **Up to 23 points**
 - Number of low-income community members served by proposed program (programs with a broad reach are preferred)
 - Proposed program provides climate adaptation, health, safety, and resilience benefits, such as:
 - Economic benefits
 - Mobility benefits
 - Housing protection
 - Lasting positive impacts for low-income communities
 - Reduced greenhouse gas emissions
- 5. Local Vendor Preference Policy** **Up to 5 points**
 - The City of Berkeley applies a local vendor preference for scoring RFQ submissions (City Council Resolution No. 69,890-N.S.). See Section VII of this RFP, Paragraph F for more information.

V. PAYMENT

Invoices: Invoices must be fully itemized, and provide sufficient information for approving payment and audit. Invoices must be accompanied by receipt for services in order for payment to be processed. **Email invoices to Accounts Payable;** (List on invoice, Attn: Billi Romain/Planning Department, Office of Energy & Sustainable Development) and reference the contract number.

City of Berkeley
Accounts Payable
P.O. Box 700
Berkeley, CA 94710-700
Attn: Billi Romain, Planning, Office of Energy and Sustainable Development
Email: **AccountsPayable@cityofberkeley.info**
Phone: 510-981-7310

Payments: The City will make payment to the vendor within 30 days of receipt of a correct, approved and complete invoice.

VI. CITY REQUIREMENTS

A. Non-Discrimination Requirements:

Ordinance No. 5876-N.S. codified in B.M.C. Chapter 13.26 states that, for contracts worth more than \$3,000 bids for supplies or bids or proposals for services shall include a completed Workforce Composition Form. Businesses with fewer than five employees are exempt from submitting this form. (See B.M.C. 13.26.030)

Under B.M.C. section 13.26.060, the City may require any bidder or vendor it believes may have discriminated to submit a Non-Discrimination Program. The Contract Compliance Officer will make this determination. This applies to all contracts and all consultants (contractors). Berkeley Municipal Code section 13.26.070 requires that all contracts with the City contain a non-discrimination clause, in which the contractor agrees not to discriminate and allows the City access to records necessary to monitor compliance. This section also applies to all contracts and all consultants. **Bidders must submit the attached Non-Discrimination Disclosure Form with their proposal.**

B. Nuclear Free Berkeley Disclosure Form:

Berkeley Municipal Code section 12.90.070 prohibits the City from granting contracts to companies that knowingly engage in work for nuclear weapons. This contracting prohibition may be waived if the City Council determines that no reasonable alternative exists to doing business with a company that engages in nuclear weapons work. If your company engages in work for nuclear weapons, explain on the Disclosure Form the nature of such work. **Bidders must submit the attached Nuclear Free Disclosure Form with their proposal.**

C. Oppressive States:

The City of Berkeley prohibits granting of contracts to firms that knowingly provide personal services to specified Countries. This contracting prohibition may be waived if the City Council determines that no reasonable alternative exists to doing business with a company that is covered by City Council Resolution No. 59,853-N.S. If your company or any subsidiary is covered, explain on the Disclosure Form the nature of such work. **Bidders must submit the attached Oppressive States Disclosure Form with their proposal.**

D. Sanctuary City Contracting Ordinance:

Chapter 13.105 of the Berkeley Municipal Code prohibits the City from granting and or retaining contracts with any person or entity that provides Data Broker or Extreme Vetting services to the U.S. Immigration and Customs Enforcement Division of the United States Department of Homeland Security ("ICE"). **Bidders must submit the attached Sanctuary City Compliance Statement with their proposal.**

E. Conflict of Interest:

In the sole judgment of the City, any and all proposals are subject to disqualification on the basis of a conflict of interest. The City may not contract with a vendor if the vendor or an employee, officer or director of the proposer's firm, or any immediate family member of the preceding, has served as an elected official, employee, board or commission member of the City who influences the making of the contract or has a direct or indirect interest in the contract.

Furthermore, the City may not contract with any vendor whose income, investment, or real property interest may be affected by the contract. The City, at its sole option, may disqualify any proposal on the basis of such a conflict of interest. **Please identify any person associated with the firm that has a potential conflict of interest.**

F. Berkeley Living Wage Ordinance:

Chapter 13.27 of the Berkeley Municipal Code requires that contractors offer all eligible employees with City mandated minimum compensation during the term of any contract that may be awarded by the City. If the Contractor is not currently subject to the Living Wage Ordinance, cumulative contracts with the City within a one-year period may subject Contractor to the requirements under B.M.C. Chapter 13.27. A certification of compliance with this ordinance will be required upon execution of a contract. The current Living Wage rate can be found here: https://www.cityofberkeley.info/Finance/Home/Vendors_Living_Wage_Ordinance.aspx. The Living Wage rate is adjusted automatically effective June 30th of each year commensurate with the corresponding increase in the Consumer Price Index published in April of each year. If the Living Wage rate is adjusted during the term of your agreement, you must pay the new adjusted rate to all eligible employees, regardless of what the rate was when the contract was executed.

G. Berkeley Equal Benefits Ordinance:

Chapter 13.29 of the Berkeley Municipal Code requires that contractors offer domestic partners the same access to benefits that are available to spouses. A certification of compliance with this ordinance will be required upon execution of a contract.

H. Statement of Economic Interest:

The City's Conflict of Interest Code designates "consultants" as a category of persons who must complete Form 700, Statement of Economic Interest, at the beginning of the contract period and again at the termination of the contract. The selected contractor will be required to complete the Form 700 before work may begin.

VII. OTHER REQUIREMENTS

A. Insurance

The selected contractor will be required to maintain general liability insurance in the minimum amount of \$2,000,000, automobile liability insurance in the minimum amount of \$1,000,000 and a professional liability insurance policy in the amount of \$2,000,000 to cover any claims arising out of the performance of the contract. The general liability and automobile insurance must name the City, its officers, agents, volunteers and employees as additional insured.

B. Worker's Compensation Insurance:

A selected contractor who employs any person shall maintain workers' compensation insurance in accordance with state requirements. Sole proprietors with no employees are not required to carry Worker's Compensation Insurance.

C. Business License

Virtually every contractor that does business with the City must obtain a City business license as mandated by B.M.C. Ch. 9.04. The business license requirement applies whether or not the contractor has an office within the City limits. However, a "casual" or "isolated" business transaction (B.M.C. section 9.04.010) does not subject the contractor to the license tax. Warehousing businesses and charitable organizations are the only entities specifically exempted in the code from the license requirement (see B.M.C. sections, 9.04.295 and 9.04.300). Non-profit organizations are granted partial exemptions (see B.M.C. section 9.04.305). Persons who, by reason of physical infirmity, unavoidable misfortune, or unavoidable poverty, may be granted an exemption of one annual free license at the discretion of the Director of Finance. (See B.M.C. sections 9.04.290).

Vendor must apply for a City business license and show proof of application to Purchasing Manager within seven days of being selected as intended contractor.

The Customer Service Division of the Finance Department located at 1947 Center Street, Berkeley, CA 94704, issues business licenses. Contractors should contact this division for questions and/or information on obtaining a City business license, in person, or by calling 510-981-7200.

D. Recycled Paper

Any printed reports for the City required during the performance of the work shall be on 100% recycled paper, and shall be *printed on both sides of the page* whenever practical.

E. State Prevailing Wage:

Certain labor categories under this project may be subject to prevailing wages as identified in the State of California Labor Code commencing in Section 1770 et seq. These labor categories, when employed for any "work performed during the design and preconstruction phases of construction including, but not limited to, inspection and land surveying work," constitute a "Public Work" within the definition of Section 1720(a)(1) of the California Labor Code requiring payment of prevailing wages.

Wage information is available through the California Division of Industrial Relations web site at:
http://www.dir.ca.gov/OPRL/statistics_and_databases.html

F. Local Vendor Preference

City of Berkeley applies a local vendor preference for scoring RFQ submissions (City Council Resolution No. 69,890-N.S.)

A **local business** is defined as "a business firm with fixed offices or distribution points located within the City of Berkeley boundaries and listed in the Permits and License Tax paid file, with a Berkeley business street address."

Pricing is not considered while reviewing competitive responses for professional services. When evaluating a technical response for professional services, local Berkeley business can earn an additional five (5) points by meeting the following years as a local Berkeley-based business:

Years as a Local Business	
Years in Berkeley	Additional Points
0 - 5	1
6 - 10	2
11 - 15	3
16 - 20	4
20 +	5

As an example, if a firm is evaluated and their score is 85/100, and they have been a (verifiable) Berkeley business for 25 years, five (5) points would be added to their score under the heading of “local vendor preference”, and their adjusted score would be 90/100.

VIII. SCHEDULE (Dates are subject to change)

<input type="checkbox"/> Issue RFP to Potential Bidders	December 3, 2021
<input type="checkbox"/> Pre-Bid Workshop/Webinar	December 13, 2021
<input type="checkbox"/> Questions Due	January 7, 2022
<input type="checkbox"/> Proposals Due from Potential Bidders	January 25 2022
<input type="checkbox"/> Complete Selection Process	March 1, 2022
<input type="checkbox"/> Council Approval of Contract (over \$50k)	May 31, 2022
<input type="checkbox"/> Award of Contract	June 1, 2022
<input type="checkbox"/> Sign and Process Contract	July 26, 2022
<input type="checkbox"/> Notice to Proceed	July 27, 2022

Thank you for your interest in working with the City of Berkeley for this service. We look forward to receiving your proposal.

Attachments:

• Check List of Required items for Submittal	Attachment A
• Non-Discrimination/Workforce Composition Form	Attachment B
• Nuclear Free Disclosure Form	Attachment C
• Oppressive States Form	Attachment D
• Sanctuary City Compliance Statement	Attachment E
• Living Wage Form	Attachment F
• Equal Benefits Certification of Compliance	Attachment G
• Right to Audit Form	Attachment H
• Insurance Endorsement	Attachment I
• Berkeley Pilot Climate Equity Fund Proposal Application	Attachment J

ATTACHMENT A

CHECKLIST

- ☐ Attachment J: Berkeley Pilot Climate Equity Fund Proposal Application
- ☐ The following forms, completed and **signed in blue ink** (attached):
 - ☐ Non-Discrimination/Workforce Composition Form Attachment B
 - ☐ Nuclear Free Disclosure Form Attachment C
 - ☐ Oppressive States Form Attachment D
 - ☐ Sanctuary City Compliance Statement Attachment E
 - ☐ Living Wage Form (*may be optional*) Attachment F
 - ☐ Equal Benefits Certification (EBO-1) (*may be optional*) Attachment G

ADDITIONAL SUBMITTALS REQUIRED FROM SELECTED VENDOR AFTER COUNCIL APPROVAL TO AWARD CONTRACT.

- ☐ Provide **original-signed in blue ink** Evidence of Insurance
 - ☐ Auto
 - ☐ Liability
 - ☐ Worker's Compensation
- ☐ Right to Audit Form Attachment H
- ☐ Commercial General & Automobile Liability Endorsement Form Attachment I
- ☐ Berkeley Business License

For informational purposes only: Sample of Personal Services Contract can be found on the City's website on the current bid and proposal page at the top of the page.

NON-DISCRIMINATION/WORKFORCE COMPOSITION FORM FOR NON-CONSTRUCTION CONTRACTS

To assist the City of Berkeley in implementing its Non-Discrimination policy, it is requested that you furnish information regarding your personnel as requested below and return it to the City Department handling your contract:

Organization: _____

Address: _____

Business Lic. #: _____

Occupational Category: (See reverse side for explanation of terms)	Total Employees		White Employees		Black Employees		Asian Employees		Hispanic Employees		Other Employees	
	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
Official/Administrators												
Professionals												
Technicians												
Protective Service Workers												
Para-Professionals												
Office/Clerical												
Skilled Craft Workers												
Service/Maintenance												
Other (specify)												
Totals:												

Is your business MBE/WBE/DBE certified? Yes: _____ No: _____ If yes, by what agency? _____

If yes, please specify: Male: _____ Female: _____ Indicate ethnic identifications: _____

Do you have a Non-Discrimination policy? Yes: _____ No: _____

Signed: _____ Date: _____

Verified by: _____ Date: _____

City of Berkeley Contract Compliance Officer

Attachment B (page 1)

Occupational Categories

Officials and Administrators - Occupations in which employees set broad policies, exercise overall responsibility for execution of these policies, or provide specialized consultation on a regional, district or area basis. Includes: department heads, bureau chiefs, division chiefs, directors, deputy superintendents, unit supervisors and kindred workers.

Professionals - Occupations that require specialized and theoretical knowledge that is usually acquired through college training or through work experience and other training that provides comparable knowledge. Includes: personnel and labor relations workers, social workers, doctors, psychologists, registered nurses, economists, dietitians, lawyers, systems analysts, accountants, engineers, employment and vocational rehabilitation counselors, teachers or instructors, and kindred workers.

Technicians - Occupations that require a combination of basic scientific or technical knowledge and manual skill that can be obtained through specialized post-secondary school education or through equivalent on-the-job training. Includes: computer programmers and operators, technical illustrators, highway technicians, technicians (medical, dental, electronic, physical sciences) and kindred workers.

Protective Service Workers - Occupations in which workers are entrusted with public safety, security and protection from destructive forces. Includes: police officers, fire fighters, guards, sheriffs, bailiffs, correctional officers, detectives, marshals, harbor patrol officers, and kindred workers.

Para-Professionals - Occupations in which workers perform some of the duties of a professional or technician in a supportive role, which usually requires less formal training and/or experience normally required for professional or technical status. Such positions may fall within an identified pattern of a staff development and promotion under a "New Transporters" concept. Includes: library assistants, research assistants, medical aides, child support workers, police auxiliary, welfare service aides, recreation assistants, homemaker aides, home health aides, and kindred workers.

Office and Clerical - Occupations in which workers are responsible for internal and external communication, recording and retrieval of data and/or information and other paperwork required in an office. Includes: bookkeepers, messengers, office machine operators, clerk-typists, stenographers, court transcribers, hearings reporters, statistical clerks, dispatchers, license distributors, payroll clerks, and kindred workers.

Skilled Craft Workers - Occupations in which workers perform jobs which require special manual skill and a thorough and comprehensive knowledge of the processes involved in the work which is acquired through on-the-job training and experience or through apprenticeship or other formal training programs. Includes: mechanics and repairpersons, electricians, heavy equipment operators, stationary engineers, skilled machining occupations, carpenters, compositors and typesetters, and kindred workers.

Service/Maintenance - Occupations in which workers perform duties which result in or contribute to the comfort, convenience, hygiene or safety of the general public or which contribute to the upkeep and care of buildings, facilities or grounds of public property. Workers in this group may operate machinery. Includes: chauffeurs, laundry and dry cleaning operatives, truck drivers, bus drivers, garage laborers, custodial personnel, gardeners and groundskeepers, refuse collectors, and construction laborers.

Attachment B (page 2)

CITY OF BERKELEY
Nuclear Free Zone Disclosure Form

I (we) certify that:

1. I am (we are) fully cognizant of any and all contracts held, products made or otherwise handled by this business entity, and of any such that are anticipated to be entered into, produced or handled for the duration of its contract(s) with the City of Berkeley. (To this end, more than one individual may sign this disclosure form, if a description of which type of contracts each individual is cognizant is attached.)
2. I (we) understand that Section 12.90.070 of the Nuclear Free Berkeley Act (Berkeley Municipal Code Ch. 12.90; Ordinance No. 5784-N.S.) prohibits the City of Berkeley from contracting with any person or business that knowingly engages in work for nuclear weapons.
3. I (we) understand the meaning of the following terms as set forth in Berkeley Municipal Code Section 12.90.130:

"Work for nuclear weapons" is any work the purpose of which is the development, testing, production, maintenance or storage of nuclear weapons or the components of nuclear weapons; or any secret or classified research or evaluation of nuclear weapons; or any operation, management or administration of such work.

"Nuclear weapon" is any device, the intended explosion of which results from the energy released by reactions involving atomic nuclei, either fission or fusion or both. This definition of nuclear weapons includes the means of transporting, guiding, propelling or triggering the weapon if and only if such means is destroyed or rendered useless in the normal propelling, triggering, or detonation of the weapon.

"Component of a nuclear weapon" is any device, radioactive or non-radioactive, the primary intended function of which is to contribute to the operation of a nuclear weapon (or be a part of a nuclear weapon).

4. Neither this business entity nor its parent nor any of its subsidiaries engages in work for nuclear weapons or anticipates entering into such work for the duration of its contract(s) with the City of Berkeley.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Project Name/XX-XXXXX**

Attachment C

CITY OF BERKELEY
Oppressive States Compliance Statement

The undersigned, an authorized agent of _____ (hereafter "Vendor"), has had an opportunity to review the requirements of Berkeley City Council Resolution No. 59,853-N.S. (hereafter "Resolution"). Vendor understands and agrees that the City may choose with whom it will maintain business relations and may refrain from contracting with those Business Entities which maintain business relationships with morally repugnant regimes. Vendor understands the meaning of the following terms used in the Resolution:

"Business Entity" means "any individual, firm, partnership, corporation, association or any other commercial organization, including parent-entities and wholly-owned subsidiaries" (to the extent that their operations are related to the purpose of the contract with the City).

"Oppressive State" means: **Tibet Autonomous Region and the Provinces of Abo, Kham and U-Tsang**

"Personal Services" means "the performance of any work or labor and shall also include acting as an independent contractor or providing any consulting advice or assistance, or otherwise acting as an agent pursuant to a contractual relationship."

Contractor understands that it is not eligible to receive or retain a City contract if at the time the contract is executed, or at any time during the term of the contract it provides Personal Services to:

- a. The governing regime in any Oppressive State.
- b. Any business or corporation organized under the authority of the governing regime of any Oppressive State.
- c. Any person for the express purpose of assisting in business operations or trading with any public or private entity located in any Oppressive State.

Vendor further understands and agrees that Vendor's failure to comply with the Resolution shall constitute a default of the contract and the City Manager may terminate the contract and bar Vendor from bidding on future contracts with the City for five (5) years from the effective date of the contract termination.

The undersigned is familiar with, or has made a reasonable effort to become familiar with, Vendor's business structure and the geographic extent of its operations. By executing the Statement, Vendor certifies that it complies with the requirements of the Resolution and that if any time during the term of the contract it ceases to comply, Vendor will promptly notify the City Manager in writing.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Project Name/XX-XXXXX**

I am unable to execute this Statement; however, Vendor is exempt under Section VII of the Resolution. I have attached a separate statement explaining the reason(s) Vendor cannot comply and the basis for any requested exemption.

Signature: _____ Date: _____

Attachment D

CITY OF BERKELEY
Sanctuary City Compliance Statement

The undersigned, an authorized agent of _____ (hereafter "Contractor"), has had an opportunity to review the requirements of Berkeley Code Chapter 13.105 (hereafter "Sanctuary City Contracting Ordinance" or "SCCO"). Contractor understands and agrees that the City may choose with whom it will maintain business relations and may refrain from contracting with any person or entity that provides Data Broker or Extreme Vetting services to the U.S. Immigration and Customs Enforcement Division of the United States Department of Homeland Security ("ICE"). Contractor understands the meaning of the following terms used in the SCCO:

- a. "Data Broker" means either of the following:
 - i. The collection of information, including personal information about consumers, from a wide variety of sources for the purposes of reselling such information to their customers, which include both private-sector business and government agencies;
 - ii. The aggregation of data that was collected for another purpose from that for which it is ultimately used.
- b. "Extreme Vetting" means data mining, threat modeling, predictive risk analysis, or other similar services." Extreme Vetting does not include:
 - i. The City's computer-network health and performance tools;
 - ii. Cybersecurity capabilities, technologies and systems used by the City of Berkeley Department of Information Technology to predict, monitor for, prevent, and protect technology infrastructure and systems owned and operated by the City of Berkeley from potential cybersecurity events and cyber-forensic based investigations and prosecutions of illegal computer based activity.

Contractor understands that it is not eligible to receive or retain a City contract if at the time the Contract is executed, or at any time during the term of the Contract, it provides Data Broker or Extreme Vetting services to ICE.

Contractor further understands and agrees that Contractor's failure to comply with the SCCO shall constitute a material default of the Contract and the City Manager may terminate the Contract and bar Contractor from bidding on future contracts with the City for five (5) years from the effective date of the contract termination.

By executing this Statement, Contractor certifies that it complies with the requirements of the SCCO and that if any time during the term of the Contract it ceases to comply, Contractor will promptly notify the City Manager in writing. Any person or entity who knowingly or willingly supplies false information in violation of the SCCO shall be guilty of a misdemeanor and up to a \$1,000 fine.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed this _____ day of _____, 20__, at _____, California.

Printed Name: _____ Title: _____

Signed: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Project Name/XX-XXXXX**

CITY OF BERKELEY
Living Wage Certification for Providers of Services

TO BE COMPLETED BY ALL PERSONS OR ENTITIES ENGAGING IN A CONTRACT FOR PERSONAL SERVICES WITH THE CITY OF BERKELEY.

The Berkeley Municipal Code Chapter 13.27, Berkeley's Living Wage Ordinance (LWO), provides that contractors who engage in a specified amount of business with the City (except where specifically exempted) under contracts which furnish services to or for the City in any twelve (12) month period of time shall comply with all provisions of this Ordinance. The LWO requires a City contractor to provide City mandated minimum compensation to all eligible employees, as defined in the Ordinance. In order to determine whether this contract is subject to the terms of the LWO, please respond to the questions below. Please note that the LWO applies to those contracts where the contractor has achieved a cumulative dollar contracting amount with the City. Therefore, even if the LWO is inapplicable to this contract, subsequent contracts may be subject to compliance with the LWO. Furthermore, the contract may become subject to the LWO if the status of the Contractor's employees change (i.e. additional employees are hired) so that Contractor falls within the scope of the Ordinance.

Section I.

1. IF YOU ARE A FOR-PROFIT BUSINESS, PLEASE ANSWER THE FOLLOWING QUESTIONS

- a. During the previous twelve (12) months, have you entered into contracts, including the present contract, bid, or proposal, with the City of Berkeley for a cumulative amount of \$25,000.00 or more?

YES _____ **NO** _____

If **no**, this contract is NOT subject to the requirements of the LWO, and you may continue to Section II. If **yes**, please continue to question **1(b)**.

- b. Do you have six (6) or more employees, including part-time and stipend workers?

YES _____ **NO** _____

If you have answered, "YES" to questions 1(a) and 1(b) this contract **IS** subject to the LWO. If you responded "NO" to 1(b) this contract **IS NOT** subject to the LWO. **Please continue to Section II.**

2. IF YOU ARE A NON-PROFIT BUSINESS, AS DEFINED BY SECTION 501(C) OF THE INTERNAL REVENUE CODE OF 1954, PLEASE ANSWER THE FOLLOWING QUESTIONS.

- a. During the previous twelve (12) months, have you entered into contracts, including the present contract, bid or proposal, with the City of Berkeley for a cumulative amount of \$100,000.00 or more?

YES _____ **NO** _____

If no, this Contract is NOT subject to the requirements of the LWO, and you may continue to Section II. If yes, please continue to question 2(b).

- b. Do you have six (6) or more employees, including part-time and stipend workers?

YES _____ **NO** _____

If you have answered, "YES" to questions 2(a) and 2(b) this contract **IS** subject to the LWO. If you responded "NO" to 2(b) this contract **IS NOT** subject to the LWO. **Please continue to Section II.**

Section II

Please read, complete, and sign the following:

THIS CONTRACT **IS** SUBJECT TO THE LIVING WAGE ORDINANCE. ☐

THIS CONTRACT **IS NOT** SUBJECT TO THE LIVING WAGE ORDINANCE. ☐

Attachment F (page 1)

The undersigned, on behalf of himself or herself individually and on behalf of his or her business or organization, hereby certifies that he or she is fully aware of Berkeley's Living Wage Ordinance, and the applicability of the Living Wage Ordinance, and the applicability of the subject contract, as determined herein. The undersigned further agrees to be bound by all of the terms of the Living Wage Ordinance, as mandated in the Berkeley Municipal Code, Chapter 13.27. If, at any time during the term of the contract, the answers to the questions posed herein change so that Contractor would be subject to the LWO, Contractor will promptly notify the City Manager in writing. Contractor further understands and agrees that the failure to comply with the LWO, this certification, or the terms of the Contract as it applies to the LWO, shall constitute a default of the Contract and the City Manager may terminate the contract and bar Contractor from future contracts with the City for five (5) years from the effective date of the Contract termination. If the contractor is a for-profit business and the LWO is applicable to this contract, the contractor must pay a living wage to all employees who spend 25% or more of their compensated time engaged in work directly related to the contract with the City. If the contractor is a non-profit business and the LWO is applicable to this contract, the contractor must pay a living wage to all employees who spend 50% or more of their compensated time engaged in work directly related to the contract with the City.

These statements are made under penalty of perjury under the laws of the state of California.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Project Name/XX-XXXXX**

Section III

- **** FOR ADMINISTRATIVE USE ONLY -- PLEASE PRINT CLEARLY ****

I have reviewed this Living Wage Certification form, in addition to verifying Contractor's total dollar amount contract commitments with the City in the past twelve (12) months, and determined that this Contract IS / IS NOT (circle one) subject to Berkeley's Living Wage Ordinance.

Department Name

Department Representative

Attachment F (page 2)

To be completed by
Contractor/Vendor



**Form EBO-1
CITY OF BERKELEY**

CERTIFICATION OF COMPLIANCE WITH EQUAL BENEFITS ORDINANCE

If you are a **contractor**, return this form to the originating department/project manager. If you are a **vendor** (supplier of goods), return this form to the Purchasing Division of the Finance Dept.

SECTION 1. CONTRACTOR/VENDOR INFORMATION

Name:		Vendor No.:	
Address:	City:	State:	ZIP:
Contact Person:		Telephone:	
E-mail Address:		Fax No.:	

SECTION 2. COMPLIANCE QUESTIONS

- A. The EBO is inapplicable to this contract because the contractor/vendor has no employees.
☐ Yes ☐ No (If "Yes," proceed to Section 5; if "No," continue to the next question.)
- B. Does your company provide (or make available at the employees' expense) any employee benefits?
☐ Yes ☐ No
If "Yes," continue to Question C.
If "No," proceed to Section 5. (The EBO is not applicable to you.)
- C. Does your company provide (or make available at the employees' expense) any benefits to the spouse of an employee? ☐ Yes ☐ No
- D. Does your company provide (or make available at the employees' expense) any benefits to the domestic partner of an employee? ☐ Yes ☐ No

If you answered "No" to both Questions C and D, proceed to Section 5. (The EBO is not applicable to this contract.) **If you answered "Yes" to both Questions C and D, please continue to Question E.**
If you answered "Yes" to Question C and "No" to Question D, please continue to Section 3.

- E. Are the benefits that are available to the spouse of an employee identical to the benefits that are available to the domestic partner of the employee? ☐ Yes ☐ No

If you answered "Yes," proceed to Section 4. (You are in compliance with the EBO.)
If you answered "No," continue to Section 3.

SECTION 3. PROVISIONAL COMPLIANCE

- A. Contractor/vendor is not in compliance with the EBO now but will comply by the following date:
- ☐ By the first effective date after the first open enrollment process following the contract start date, not to exceed two years, if the Contractor submits evidence of taking reasonable measures to comply with the EBO; or
- ☐ At such time that administrative steps can be taken to incorporate nondiscrimination in benefits in the Contractor's infrastructure, not to exceed three months; or
- ☐ Upon expiration of the contractor's current collective bargaining agreement(s).

Attachment G (page 1)

B. If you have taken all reasonable measures to comply with the EBO but are unable to do so, do you agree to provide employees with a cash equivalent?* ☐ Yes ☐ No

* The cash equivalent is the amount of money your company pays for spousal benefits that are unavailable for domestic partners.

SECTION 4. REQUIRED DOCUMENTATION

At time of issuance of purchase order or contract award, you may be required by the City to provide documentation (copy of employee handbook, eligibility statement from your plans, insurance provider statements, etc.) to verify that you do not discriminate in the provision of benefits.

SECTION 5. CERTIFICATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that I am authorized to bind this entity contractually. By signing this certification, I further agree to comply with all additional obligations of the Equal Benefits Ordinance that are set forth in the Berkeley Municipal Code and in the terms of the contract or purchase order with the City.

Executed this _____ day of _____, in the year _____, at _____, _____
(City) (State)

Name (please print)

Signature

Title

Federal ID or Social Security Number

FOR CITY OF BERKELEY USE ONLY

☐ Non-Compliant (The City may not do business with this contractor/vendor)

☐ One-Person Contractor/Vendor

☐ Full Compliance

☐ Reasonable Measures

☐ Provisional Compliance Category, Full Compliance by Date: _____

Staff Name(Sign and Print): _____ Date: _____

Attachment G (page 2)

CITY OF BERKELEY
Right to Audit Form

The contractor agrees that pursuant to Section 61 of the Berkeley City Charter, the City Auditor's office may conduct an audit of Contractor's financial, performance and compliance records maintained in connection with the operations and services performed under this contract.

In the event of such audit, Contractor agrees to provide the Auditor with reasonable access to Contractor's employees and make all such financial, performance and compliance records available to the Auditor's office. City agrees to provide Contractor an opportunity to discuss and respond to/any findings before a final audit report is filed.

Signed: _____ Date: _____

Print Name & Title: _____

Company: _____

Contract Description/Specification No: **Project Name/XX-XXXXX**

Please direct questions regarding this form to the Auditor's Office, at (510) 981-6750.

Attachment H

CITY OF BERKELEY
Commercial General and Automobile Liability Endorsement

The attached Certificates of Insurance are hereby certified to be a part of the following policies having the following expiration dates:

Policy No.	Company Providing Policy	Expir. Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The scope of the insurance afforded by the policies designated in the attached certificates is not less than that which is afforded by the Insurance Service Organization's or other "Standard Provisions" forms in use by the insurance company in the territory in which coverage is afforded.

Such Policies provide for or are hereby amended to provide for the following:

1. The named insured is _____.
2. CITY OF BERKELEY ("City") is hereby included as an additional insured with respect to liability arising out of the hazards or operations under or in connection with the following agreement:
_____.

The insurance provided applies as though separate policies are in effect for both the named insured and City, but does not increase the limits of liability set forth in said policies.

3. The limits of liability under the policies are not less than those shown on the certificate to which this endorsement is attached.
4. Cancellation or material reduction of this coverage will not be effective until thirty (30) days following written notice to _____, Department of _____, Berkeley, CA.
5. This insurance is primary and insurer is not entitled to any contribution from insurance in effect for City.

The term "City" includes successors and assigns of City and the officers, employees, agents and volunteers.

Insurance Company

Date: _____

By: _____
Signature of Underwriter's
Authorized Representative

Contract Description/Specification No: **Project Name/XX-XXXXX**

Attachment I

EXHIBIT A

SCOPE OF SERVICES

Agency Name: Waterside Workshops
Contract Period: June 23, 2022 – May 31, 2024
Program Title: Pilot Climate Equity Fund Program (Program Area #2, Electric Mobility Access Pilot)

A. Program Description

The City of Berkeley (the City) established a Pilot Climate Equity Fund (CEF) to provide climate and resilience benefits to low-income residents in Berkeley through programs that support building and transportation electrification. While low-income households typically have low greenhouse gas (GHG) emissions, they often bear the greatest burdens of a changing climate. The purpose of this funding is to maximize equitable GHG emissions reductions, climate adaptation, and resilience benefits for income qualified households. Pilots should be consistent with the goals of the Equity Guardrails developed as part of *Berkeley's Existing Buildings Electrification Strategy (BEBE Strategy)*¹:

- **Maximize Access to Health, Safety & Mobility Benefits:** Prioritize the benefits of building and transportation electrification including health, safety, and comfort to those most impacted by climate change.
- **Maximize Access to Economic Benefits:** Leverage incentives and financing, reduce costs when possible, and support high-road job opportunities.
- **Maximize Ease of Participation:** Be easy for all community members to access, and integrate with other programs and services when possible.
- **Promote Housing Affordability & Anti-Displacement:** Support housing preservation and renter protections, and not displace renters or homeowners.

The Electric Mobility Access Pilot (Program Area #2) seeks to enhance mobility for low-income community members in ways that reflect community priorities and support modal shifts. Goals for this program area are consistent with those of the Berkeley Electric Mobility Roadmap:

- Ensure equity in access to electric mobility
- Improve alternatives to driving
- Achieve zero carbon emissions

Projects should demonstrate how increased access to bicycles, electric bicycles, electric scooters, or other forms of micromobility can support low-income residents in Berkeley.

As detailed in this Scope of Services, Waterside Workshops, in partnership with GRID Alternatives Bay Area, will be creating an electric bike (e-bike) access program providing e-bikes to income-qualified Berkeley households, and a youth education and workforce training program on e-bikes that will service the e-bikes and provide training for high-road job opportunities. Waterside Workshop was selected for the Electric Mobility Access Pilot (Program Area #2) for its strong track record in the community, partnership with GRID Alternatives, leveraging of other funding and program aspects, and its proposed scope addressing both mobility and workforce benefits.

¹ <https://berkeleyca.gov/your-government/our-work/adopted-plans/berkeley-existing-buildings-electrification-strategy>

Program Reach

The program aims to deploy approximately 50 e-bikes to income-qualified Berkeley residents for an initial pilot term of up to 12 months and to train approximately 50 low-income, ethnically diverse youth, ages 14-24, from Berkeley and the greater East Bay, to assemble and inspect/service the e-bikes in this program for safety and maintenance on a quarterly basis. The program will target low-income Berkeley residents both to receive e-bikes and to participate in the youth bicycle mechanics internship program, with a preference for those at or below 80% area median income (AMI). Alameda County's AMI for 2022 is \$142,800 (based on a household with 4 persons).² Waterside Workshops will use the following methodology to reach and ensure resources go to low-income residents/households:

If income information is not collected directly, any resources, equipment, or stipends will be given to low-income residents who are income-qualified for other federal, California State, or regional programs that include Berkeley in its jurisdiction, such as the PG&E CARE program, CalFresh Supplemental Nutrition Assistance Program (SNAP), MediCal, Section 8 Housing, etc.

The City will approve of distribution of resources to ensure they are going to low-income residents. Waterside Workshops will maintain records of the income qualifications, and other demographic data, of the e-bike recipients and youth bicycle mechanics internship program participants to provide to the City for review and approval prior to distribution.

B. Program Tasks, Deliverables, Milestones and Timeline

Alterations to specific tasks, deliverables, and timelines may be agreed to, in writing, by both the City and Contractor over the course of the project.

**Note an asterisk denotes a payment deliverable.*

1. Task 1 - Project Management and Collaboration:

- a. Regular, on-going meetings with the City staff project manager throughout the project to coordinate efforts is important. Timely communication with the City project manager regarding emerging issues and concerns about the program and its relationship with the larger Berkeley community is expected. The contractor will coordinate with City staff to keep staff informed about the status of the project, will manage the budget and schedule, submit requests for disbursement, and other project management activities such as any issues and proposed resolutions.
- b. Collaboration with the other Climate Equity Fund (CEF) Program partners will also be necessary to coordinate outreach and recruitment, share ideas, and build capacity to strengthen the combined outcomes of the CEF Program.
- c. Contractor will provide feedback on program implementation in order to help the City improve the program.
- d. City and contractor will review and provide feedback on deliverables within two (2) weeks.

² <https://www.hcd.ca.gov/docs/grants-and-funding/inc2k22.pdf>

Proposed timeline: June 2022-May 2024 (2 years)

Deliverables:

- i. **Kickoff meeting with City (and potentially CEF Program partners)*
- ii. Regular, on-going meetings with City, with an agenda shared in advance (approximately every 2 weeks)
- iii. Collaboration meetings with CEF Program partners
- iv. Invoices (monthly or less frequent; can be combined with quarterly progress reports)
- v. **Quarterly progress reports (assume 7 total; the final evaluation report is a separate task)*

Budget: \$23,000

2. Task 2 – Develop Program Evaluation Plan

- a. Waterside Workshops will work with the City to develop a Program Evaluation Plan that includes a methodology for how they will identify and measure data metrics to report and track throughout the project in order to measure impact of the program, and a list of relevant metrics to be monitored and evaluated. Metrics should include targeted number of residents to be reached, target populations, and include both qualitative and quantitative measures. Anticipated metrics include miles traveled, changes in household vehicle use and/or ownership, as well as evaluation results and stories from the community. Metrics developed in the program evaluation plan will be included as part of the final report (see Task 7).
- b. **Proposed timeline:** June 2022-September 2022
- c. **Deliverables:**
 - i. Draft Program Evaluation Plan
 - ii. **Final Program Evaluation Plan*
- d. **Budget:** \$2,000

3. Task 3 – Community Engagement Plan and Implementation

- a. Waterside Workshops will develop a plan, to be approved by the City, of how it plans to engage with the community to co-develop the project structure and solicit input on community transportation needs. Engagement methods are anticipated to include a mix of virtual workshops and in-person events (safely gathering), and targeted outreach to organizations such as those involved in the Berkeley Electric Mobility Roadmap, organizations that provide direct services to income-qualified Berkeley residents (food banks, health services, etc.), email outreach, opportunities through CEF Program partners, and in-person outreach at existing community events.
- b. Implementation of the community engagement plan will include digital outreach, virtual workshops, in-person events, and leveraging outreach network, as detailed in the Engagement Plan.
- c. As appropriate, community engagement will include education and support with connecting to other mobility programs.

- d. Results of engagement efforts which includes recommended participant selection process and criteria, and type(s) of e-bike(s) to procure based on identified transportation needs will be created and shared with the City.

Proposed timeline: June 2022-November 2022

Deliverables

- i. List of stakeholders
- ii. Draft Community Engagement Plan
- iii. ****Final Community Engagement Plan***
- iv. Community Engagement Meetings and Other Outreach
- v. ****Summary of Engagement and Recommendations***

Budget: \$25,000

4. Task 4 – E-Bike Procurement and Pilot Participant Selection

- a. Waterside Workshops will procure approximately 50 e-bikes (final number dependent bike availability, cost per bike, and final project design based on community input collected in Task 3), sets of essential accessories (helmets, lights, locks), and e-bike parts for repairs.
- b. Develop a system for bike safety training and regular bike maintenance for pilot participants, leveraging existing programming wherever possible.
- c. Develop a draft and final participant user agreement. Include language that will allow for collection of quantitate and qualitative information on use and experience, to inform metrics and program evaluation.
- d. Conduct participant outreach and application process through channels used in Task 3 to identify potential initial pilot participants.

Proposed timeline: June 2022-March 2023

Deliverables

- i. Procurement contracts
- ii. ****E-bikes, parts, and essential accessory purchases (approximately 50)***
- iii. System for bike safety training and regular bike maintenance for pilot participants
- iv. ****Final Participant User Agreement, including Safety Training and Bike Maintenance***
- v. ****Project Marketing Materials for Pilot Participants***

Budget: \$115,000

5. Task 5 – Develop and Integrate E-Bike Training into Internship Program, E-bike Delivery and Assembly

- a. Create and integrate industry-standard e-bike curriculum into Waterside Workshops' existing bicycle mechanics internship program.
- b. Utilize curriculum and youth interns to assemble and safety-check the approximately 50 bikes to be deployed in this project.

Proposed timeline: June 2022-March 2023

Deliverables

- i. **E-bike curriculum (integrated into bicycle mechanics internship program)*
- ii. Assembled e-bikes

Budget: \$30,000

6. Task 6 – Deployment and Pilot Operations

- a. Deploy approximately 50 e-bikes and associated essential accessories to income-qualified Berkeley residents for an initial pilot term of up to 12 months to evaluate and iterate programming, and determine whether/how the model can be sustained over the long term.
- b. Conduct initial safety training session(s) with participants, schedule quarterly bike maintenance and participant check-ins.
- c. Administer quarterly surveys to participants.

Proposed timeline: March 2023-March 2024

Deliverables

- i. E-bike distribution
- ii. **Conduct e-bike safety training sessions for participants at start of bike deployment to participants*
- iii. Draft surveys for participants
- iv. Quarterly participant check-ins, bike maintenance, and surveys (assume 3-4 per participant)
- v. **Survey/check-in/bike maintenance summaries (assume 3-4 total)*

Budget: \$45,000

7. Task 7 – Final Report

- a. Contractor will analyze data collected over the course of the project and provide a final report with as much of the following information that is available and relevant, to be agreed upon with the City Project Manager:
 - i. Resulting performance metrics detailed in Task 2
 - ii. Success in meeting climate mitigation, climate adaptation, health, safety, and resilience community benefits program goals, including:
 1. Number of low-income community members served
 2. Economic impacts
 3. Mobility impacts including e-bike miles traveled and changes in household vehicle use and/or ownership
 4. Lasting positive impacts for low-income communities
 5. Capacity building achievements
 6. Partnership building achievements
 7. Greenhouse gas reduction benefits to the extent possible (e.g. tons avoided CO₂, and/or automobile VMT reduced)

- 8. Qualitative results, including narratives/stories/qualitative data from feedback of participants, pictures/videos
- 9. Other resources/funds leveraged (program/name, dollar amount)
- 10. Demographic data of households/individuals served
- iii. Lessons learned (including material to help inform the long-term development of the CEF)

Proposed timeline: March 2024-May 2024

Deliverables

- i. Draft Project Evaluation Report
- ii. **Final Project Evaluation Report*

Budget: \$10,000

EXHIBIT B

PAYMENT

Agency Name: Waterside Workshops
Contract Period: June 23, 2022 – May 31, 2024
Program Title: Pilot Climate Equity Fund Program (Program Area #2, Electric Mobility Access Pilot)

Eligible costs

Program Area 2: Examples of eligible expenses for this program area include costs related to community engagement and partnership, equipment purchases and loans, operating costs, printing materials, community events, and/or staff time for program design and implementation.

1. Personnel Expenses

Name	Organization	Staff Position/Role	Hourly Salary
Neil Larsen	Waterside Workshops	Executive Director/Project lead	\$40
Daniel McNaughton	Waterside Workshops	Street Level Cycles Program Director/E-bike procurement, assembly, job training	\$35
Hannah Otto	Waterside Workshops	Street Level Cycles Program Manager/Participant selection & coordination	\$30
Edgar Arellano	GRID Alternatives	Micromobility Program Manager/Outreach, evaluation, and final report	\$38
Cynthia Ibarra	GRID Alternatives	Clean Mobility Manager/Outreach, evaluation, and final report	\$40
TBD	GRID Alternatives	Clean Mobility Coordinator/Outreach, evaluation, and final report	\$29

2. Total Proposed Budget

Cost Type	Cost Per Unit/Hour (Optional)	Number of Units/Hours (Optional)	Dollar Amount	% of Total Budget
Personnel Expenses				
Staff			\$113,000	
Subcontractors			\$37,000	
<i>Subtotal Personnel Expenses</i>			<i>\$150,000</i>	60%

Other Expenses				
Equipment (ebikes, essential accessories, tools, parts)			\$100,000	
Transportation				
Community Stipends				
Insurance				
Print Engagement Materials				
Other Direct Costs				
<i>Subtotal Other Expenses</i>			<i>\$100,000</i>	40%
Total Expenses			\$250,000	100%

3. Deliverable payment schedule

Payment Deliverable	Dollar Amount	% of Total Budget	Anticipated Delivery
Task 1 – Kickoff Meeting	\$2,000	0.8%	7/22
Task 1 – Quarterly Reports (assume 7 total; \$3,000 each)	\$21,000	8.4%	9/22, 12/22, 03/23, 6/23, 9/23, 12/23, 3/24
Task 2 – Final Program Evaluation Plan	\$2,000	0.8%	9/22
Task 3 – Final Community Engagement Plan	\$10,000	4.0%	8/22
Task 3 – Summary of Engagement and Recommendations	\$15,000	6.0%	11/22
Task 4 – E-bikes, parts, and essential accessory purchases (total for approximately 50 e-bikes)	\$100,000	40.0%	2/23
Task 4 – Final Participant User Agreement	\$10,000	4.0%	3/23
Task 4 – Project Marketing Materials	\$5,000	2.0%	3/23
Task 5 – E-bike curriculum	\$30,000	12.0%	3/23
Task 6 – Initial e-bike safety training sessions at start of bike deployment to participants	\$10,000	4.0%	3/23
Task 6 – Survey/check-in/bike maintenance summaries (assume 3-4 total)	\$35,000	14.0%	9/23, 12/23, 3/24
Task 7 – Final Project Evaluation Report	\$10,000	4.0%	5/24
Total	\$250,000	100.0%	

All payment deliverables must be reviewed and approved by the City before payment.

Advanced payments, may be requested for consideration and approval by the City. A request for advance payment must include equipment descriptions, quotes, terms, and a justification for why the advance is needed. Advances will only be considered if program reporting and invoices have been clear, complete, and timely.

Invoices, not to be submitted more frequently than one time per month, must be fully itemized, referencing work by deliverable, described in Exhibit A, Scope of Services, and provide sufficient information for approving payment and examination by audit.

The City will make payments to the vendor within 30 days of correct, approved and complete invoice.

Email invoices to Accounts Payable, AccountsPayable@cityofberkeley.info, with email copies to the Project Manager, Sarah Moore, smoore@cityofberkeley.info, and Billi Romain, bromain@cityofberkeley.info.

Invoices must include the contract number and as well as this information for reference:

City of Berkeley
Accounts Payable
P.O. Box 700
Berkeley, CA 94710-700
ATTN: Billi Romain, Office of Energy and Sustainable Development
Email: AccountsPayable@cityofberkeley.info,
Phone: 510-981-7310