

August 25, 2023

Request for Proposals

for

Regional Demographic, Housing, and Employment Forecast

from the

Tulare County Association of Governments (TCAG)

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Visalia, California 93291



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I. Introduction to the Request for Proposals (RFP)

The Tulare County Association of Governments (TCAG), as the Metropolitan Planning Organization and the Regional Transportation Planning Agency (RTPA) for Tulare County, is requesting proposals from qualified consultants for the preparation of a Regional Demographic, Housing, and Employment Forecast. The objective of this RFP is to select a qualified consultant to enter into an agreement to perform the work described below. A joint venture of firms or a single firm for all or part of the tasks described is acceptable to accomplish the anticipated Scope of Services outlined in Attachment A.

The attached preliminary scope of work is intended to provide a framework for an evaluation of regional workers' travel choices and patterns, and future trends in employment, and housing location choice. TCAG is seeking proposers' insights on how best to achieve the purpose. Proposals must present the proposers' current thinking in sufficient detail to demonstrate their understanding of the issues and the soundness of their approach for accomplishing the project purpose. The proposers' effort should address the tasks presented in the preliminary scope and suggest other tasks the proposer deems critical and/or identify alternate approaches to tasks defined in this RFP to achieve the study's purpose.

TCAG and the region's local jurisdictions are interested in learning more about the breadth and scale of recent changes brought on by the pandemic and the wide expansion of WFH upon the region's workers, population, and economy. We also want to gain insight into what post-pandemic trends in employment and housing location choice might look like, to better understand how these changes may affect the future population and employment growth patterns across the region. The consultant will explain the results and implications of the trend analyses and provide guidance describing how they can be incorporated into the forecasting process.

We estimate the project to take approximately six months to complete but are open to scheduling alternatives based upon consultant review of the scope. A budget of \$8 ,000 is estimated. The forecast, and supporting documents, produced by this study will be used in development of the RTP/SCS update targeted for adoption in mid-2026 and to update the regional travel model inputs used in scenario planning and analysis for the plan update.

II. Scope of Services

Attachment A identifies the Scope of Services (preliminary).

III. Selection Timeline

August 25, 2023	Distribution of Request for Proposals
September 7, 2023	Deadline for Written inquiries/questions
By September 11, 2023	Response to Inquiries
September 18, 2023	Proposals Due to TCAG by 5:00 PM
September 26, 2023	Interviews (if needed)
October 16, 2023	Consultant selection by TCAG Board (estimated)
November 15, 2023	Finalize Contract (estimated)
November 16, 2023	Work begins (estimated)

IV. Budget & Consultant Administration Responsibilities

1. **Working meetings:** Schedule and coordinate all necessary working meetings with TCAG project manager and staff.
2. **Budget:** The project is budgeted for the Fiscal Year 2023/2024. The total amount budgeted for is \$80,000. A ten-percent retention will be held for the preparation of the reports and released at contract completion. Three contract extensions totaling up to one year may be permitted upon written agreement between TCAG and Consultant
3. **Invoices and progress reports:** Invoices and accompanying progress reports shall be submitted monthly. All invoices shall include a description of work completed, including the percent completed for each project task, and the hourly rate and expenditures for each employee or subcontractor. Direct expenses shall include receipts or an acceptable form of backup.

V. Proposal Requirements

1. **Firm experience and qualifications:** Prospective consultants shall provide a summary description of the firm's overall qualifications for this project and previous experience on similar or related engagements. Qualifications and examples of previous related experience/projects should be included for the project manager and each of the key project staff proposed for the project. For each employee that works on this project (except support or clerical), the proposal must list the location of the office where that employee works (or if the employee works remotely). Failure to provide the requested information may disqualify a proposal. (15 page maximum)
2. **Understanding of the Project:** Prospective consultants shall include a narrative introducing the consultant's understanding of the project requirements. The contents of this section are to be determined by the respondent but should demonstrate a familiarity with the objectives of the RFP. Prospective consultants should identify in the proposal any additional types of information needed to complete the Scope of Services. (20 pages maximum)
3. **Project Management:** Prospective consultants shall designate by name the project manager to be employed. The selected consultant shall not replace the project manager without prior approval by the TCAG Executive Director. (3 page maximum)
4. **Project Personnel:** Prospective consultants shall describe the qualifications of all professional personnel assigned to this project, including a summary of similar work or studies each member has performed and a resume of each professional. Project personnel changes require that TCAG is notified by the Project Manager. (10 page maximum)
5. **References:** Prospective consultants shall provide names and contact information for three clients for whom the prospective consultant has performed technical and management assignments of similar complexity to that proposed in this request. At least two references shall be provided for projects on which the proposed and named project manager has worked. Up to one may exclusively include a project on which the proposed professional personnel for this project with the most hours assigned participated in. Full points cannot be awarded for past projects in which the proposed project manager or primary professional assigned did not participate. This could necessitate projects references outside

of the work of the proposing firm. A brief summary statement for each assignment shall be provided. (5 page maximum)

6. Subcontracting: If subcontractors are used, prospective consultants must submit a description of each person, firm, and the work to be done by each subcontractor. The TCAG Executive Director must approve all subcontractors and no work may be subcontracted nor the subcontractor changed without the prior approval of the TCAG Executive Director.
7. Methodology: Prospective consultants shall describe the approach to the project, specific techniques that will be used, what the reports will include, and the specific administrative and operational management expertise that will be employed. (10 page maximum)
8. Conflict of Interest: Prospective consultants shall disclose any financial, business or other relationship with TCAG, any of the eight incorporated cities in Tulare County, the County of Tulare, or any of their officers or officials that may have an impact on the outcome of the project. The prospective consultant shall also list current clients who may have a financial interest in the outcome of the project.
9. Project Costs: Prospective consultants shall include a cost proposal section or exhibit demonstrating the total cost of the work solicited under this RFP, by task. For each task, estimated costs should be broken down. Cost proposals shall detail all direct and indirect costs to be incurred for the project, broken down by task, and shall include the labor rates.
10. Signature: The proposal and accompanying certifications shall be signed by an official (or officials, as applicable) authorized to bind the consultant and shall contain a statement to the effect that the proposal is a firm offer for a 90-day period. The proposal shall also provide the following information: type of business entity (i.e., corporation, California limited partnership, etc.) and whether the business entity is registered to do business in California; and name, title, address, and telephone number of individuals with authority to negotiate and contractually bind the company.
11. Insurance Requirements: TCAG will require the selected consultant to obtain and maintain, at the consultant's sole cost and expense, insurance coverage as outlined in the attached Sample Consultant Services Contract (Attachment D).

The selected consultant shall maintain said insurance policies in effect during the term of the contract and shall cause all parties supplying services, labor, or materials to maintain insurance in amounts and coverage not less than those specified in the attached Sample Consultant Services Contract.

The selected consultant shall file certifications of this insurance, including all applicable endorsements, with TCAG prior to commencement of its performance under this agreement. Consultant must maintain adequate levels of insurance throughout the duration of the agreement.

12. Indemnity and Harmless Clause: TCAG will require the selected consultant to hold harmless, defend and indemnify TCAG, their officers, employees and agents from any liability, claims, actions, costs, damages or losses, for injury, including death to any person, or damage to any property arising out of the consultant's services, in accordance with the indemnity language included in the Sample Consultant Services Contract (Attachment D).

13. Ineligible Bidders: Each consultant must certify that it is not included on the U.S. Comptroller General's Consolidated List of Persons or Firms Currently Debarred for Violations of Various Public Contracts Incorporating Labor Standards Provisions. Attachment B must be properly completed and submitted with the proposal.

14. Disadvantaged Business Enterprise (DBE): It is the policy of the U.S. Department of Transportation that minority and women-owned business enterprises (herein referred to as DBEs) shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with federal funds under this agreement.

The proposal must list the percentage of work, by cost expended, to be completed by DBE-certified consulting firms, prime or sub-consultants. Proof of DBE certification for qualified firms is required to be submitted with the proposal. If the percentage is less than 13.5% an explanation of the attempt and failure to meet this goal must be provided. Failure to provide the requested information may disqualify the proposal.

15. Title VI of the Civil Rights Act of 1964: The contractor agrees to comply with all the requirements imposed by Title VI of the Civil Rights Act of 1964 (49 USC 2000d) and the regulations of the U.S. Department of Transportation issued there under in 49 CFR Part 21.

16. Equal Employment Opportunity: In connection with the performance of this contract, the contractor shall not discriminate against any employee or applicant for employment because of race, color, age, creed, sex, or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

17. Attachments: Attachments A through E are attached herein. Consultants must complete attachments B and C and include them at the end of the proposal.

- Attachment A Scope of Services
- Attachment B Debarment and Suspension Notification
- Attachment C Workers' Compensation Insurance
- Attachment D Insurance Requirements
- Attachment E Sample Consultant Services Contract General Terms and Conditions

VI. Scoring Criteria, Submission, and Selection

1. Selection of Successful Consultant: Selection of the successful consultant will be based on information provided in response to the Request for Proposals, information provided by former clients of the consultant for whom work of a similar scope has been done, interviews, if conducted, and consideration of any exceptions taken to the RFP or taken to the proposed contract terms and conditions. Proposals submitted by each consultant will be evaluated separately based on how well each proposal meets the scoring criteria listed below. If a high number of proposals is received, TCAG reserves the right to interview consultant teams with the higher proposal scores.

Scoring Criteria	Points
The Proposal	
Comprehension of Project	15
Thoroughness of Proposal	10
Meeting the Project Objectives	25
Project Delivery Time	5
Consultant Qualifications	
Qualifications and Experience	25
References	15
Cost	
Reasonableness of Cost	5
Subtotal	
Subtotal	100
Local Firm ¹	5
Total Possible Points (RFP)	105
Total Possible Points (Interview)	
<i>Total Possible Points (Interview)</i>	<i>100</i>
¹ Local firms are required to meet both of the following: - Have a local business office in Tulare County; and - At least 51% of the work to be conducted by employees in the local office	

2. **Contract Award:** The selected consultant will execute a contract with TCAG after consultant selection approval. The official selection of the consultant, if any, is anticipated to be made by TCAG at its **Monday, October 16, 2023**, meeting. Unsuccessful proposals will be notified in writing.
3. **Modification or Withdrawal of Proposals:** Any proposal received prior to the due date and time specified may be withdrawn or modified by written request of the consultant. However, to be considered, the final modified proposal must be received by the date and time specified above. All verbal modifications of these conditions or provisions are void and ineffective for proposal evaluation purposes. Only written changes issued to consultants by the TCAG Executive Director are authorized and binding.
4. **Selection Process:** All proposals submitted in response to this request will be screened by a selection committee using the provided scoring criteria. Proposal opening does not constitute the awarding of a contract. The contract is not in force until it is awarded by the TCAG Board and executed by TCAG.
 - a. TCAG may, during the evaluation process, request from any applicant additional information that TCAG deems necessary to determine the applicant's ability to perform the required services. If such information is requested, the applicant shall be permitted three (3) working days to submit the information requested.
 - b. TCAG reserves the right to select the applicant(s) that in its sole judgment best meets the needs of TCAG. The lowest proposed cost is not the sole criterion for recommending a contract award. TCAG reserves the right to reject any and all proposals and/or negotiate with another party or any other party directly.

c. TCAG reserves the right to conduct interviews. Consultants who will be interviewed will be notified by **September 21, 2023** for interviews on **September 26, 2023**. TCAG conduct the interview via Zoom or another electronic medium.

5. Rejection of Proposals: Failure to meet the requirements of the Request for Proposals will be cause for rejection of the proposal. TCAG may reject any proposal if it is conditional, incomplete, contains irregularities, or has inordinately high or low costs. TCAG reserves the right to reject any and all proposals without cause. TCAG may waive an immaterial deviation in a proposal when it determines that waiving a requirement is in the best interest of TCAG. The waiver of an immaterial deviation shall in no way modify the Request for Proposals documents or excuse the applicant from full compliance with the contract requirements, if the applicant is awarded the contract.
6. Public Record: All proposals submitted in response to this RFP shall become the exclusive property of TCAG. At such time as the selection committee recommends a proposal to the TCAG Board and such recommendation appears on the TCAG Board agenda, all proposals submitted in response to this RFP shall become a matter of public record and shall be regarded as public records. If there are any trade or proprietary secrets included by the consultant, the consultant may provide a different copy of the proposal that would be acceptable to release to the public.
7. Method of Payment: Payment to the selected consultant will be made upon successful completion of project tasks as invoiced by the consultant. Pre-award expenses shall not be allowed. Cash advances will not be available.

VII. Other Conditions

1. Reservation of Right to Withdraw RFP and/or Not Award Contract: TCAG reserves the right to amend or withdraw this RFP at any time without prior notice. Revisions to the RFP, if any, will be emailed to all consultants to whom the original RFP was distributed in addition to posting online with the notice of the RFP. Furthermore, TCAG makes no representations that any agreement will be awarded to any consultant responding to this RFP. TCAG expressly reserves the right to reject any and all proposals in response to this RFP without indicating any reasons for such rejection.
2. TCAG Property: All data, documents and other information provided to TCAG by the Contractor shall become the property of TCAG.
3. Pre-Contractual Expenses Not Allowed: TCAG shall not, in any event, be liable for any pre-contractual expenses incurred by any consultant. Pre-contractual expenses are defined as expenses incurred by prospective consultants such as:
 - a. Preparing and submitting a proposal in response to this RFP.
 - b. Negotiating with TCAG on any matter related to this RFP, proposal and/or contractual agreement.
 - c. Any other expenses incurred by the consultant prior to the date of a Notice to Proceed.

VIII. Proposal Submittal

Proposals must be received electronically no later than **5:00 PM on September 18, 2023**. It is recommended that a submittal email is sent without an attachment, as attachments may be too large, and access be granted for TCAG to download your document. This could be done via FTP, Dropbox, Hightail, or another service as provided by prospective consultants. Please submit proposal to Kasia Poleszczuk, at kpoleszczuk@tularecag.ca.gov.

IX. Questions

Questions should be directed to Kasia Poleszczuk at kpoleszczuk@tularecag.ca.gov. All questions must be submitted in writing by **5:00 p.m. on September 7, 2023**. Questions and responses will be posted in writing on the TCAG website. Please check www.tularecog.org/tcag/rfps-contracts/rfps regularly for amendments or additional information on this RFP. Consultants that are considering responding to this RFP are forbidden from contacting members of the Tulare County Association of Governments to discuss their proposal. Failure to comply with this requirement may cause your proposal to be denied without review.

Attachment A

I. Introduction to the Request for Proposals (RFP)

As the Metropolitan Planning Organization (MPO) for Tulare County, Tulare County Association of Governments (TCAG) prepares a Sustainable Communities Strategy (SCS) as part of each Regional Transportation Plan (RTP) update. TCAG also prepares and regularly updates its growth forecast for the region. TCAG has issued this Request for Proposals (RFP) for regional growth forecast services. A detailed scope of work is outlined below.

II. Scope of Services

The following provides details of the scope of services sought under this RFP. Respondents should build on this general description by proposing a scope of work with specific sub-tasks as deemed appropriate. Respondents should also refer to the Proposal Requirements, and Evaluation and Selection Process sections for additional requirements.

Additional tasks and work elements may be added or deleted during contract negotiations. Upon conclusion of the negotiation process, the selected consultant will be required to prepare a final work plan, schedule, and budget for inclusion into a final contract. If additional tasks are identified, the contract may be amended in the future. We estimate the project to take approximately six months to complete but are open to scheduling alternatives based upon consultant review of the scope. A budget of \$80,000 is estimated.

PART A

Task 1: Develop a high-quality demographic Growth Forecast to 2050 for the Tulare County region

The consultant will work with TCAG staff and certain advisory committees to update the demographic forecast. Base information should incorporate the latest available data from:

- 2020 Census,
- American Community Surveys,
- California Department of Finance's estimates and projections,
- State of California Employment Development Department's employment data,
- Employment data purchased by TCAG,
- Central California Travel Survey (2023),
- Remote work surveys by other valley MPOs (Kern, Fresno, others if available)
- and/or other sources identified in the final scope of work or by the consultant.

The growth forecast should also reflect local, regional and state planning and economic assumptions. The output worksheets shall include January 1, and July 1 forecast data for all future forecast years.

The growth forecast should also include school enrollment estimates and projections for grades: PreK-8, 9-12, College/University/Trade School.

TCAG's travel forecast model uses future employment, population and housing growth including the following data items/groups :

- a. Age Group:
 - 0-4 years
 - 5-13 years
 - 14-17 years
 - 18-24 years
 - 25-54 years
 - 55-64 years
 - 65-74 years
 - 75 years and older

- b. Housing type:
 - Single family
 - Multiple family (including accessory dwelling units)
 - Mobile home
 - Other (motor home, recreational vehicle, etc.)

- c. Average household size by:
 - Single family
 - Multiple family (including accessory dwelling units)
 - Mobile home
 - Other (motor home, recreational vehicle, etc.)

- d. Age of head of household:
 - 15-24 years
 - 25-64 years
 - 65-74 years
 - 75 years and older

- e. Income:
 - \$0-9,999
 - \$10,000-14,999
 - \$15,000-24,999
 - \$25,000-34,999
 - \$35,000-49,999
 - \$50,000-74,999

- \$75,000-99,999
 - \$100,000-149,999
 - \$150,000-199,999
 - \$200,000 and over
- f. Vacancy Rate:
- Single family
 - Multiple family (including accessory dwelling units)
 - Mobile home
 - Other (motor home, recreational vehicle, etc.)
- g. Housing type:
- Single family
 - Multiple family (including accessory dwelling units)
 - Mobile home
 - Other (motor home, recreational vehicle, etc.)
- h. Ethnicity:
Currently available Office of Management and Budget (OMB) and/or Census Bureau standard groupings
- i. Group Quarters:
- Institutionalized (prisons)
 - Non-institutionalized
- j. Employment: By 2022 NAICS two-digit sector categories, self-employed, and work at home

School enrollment growth forecast should also include estimates and projections for grades: PreK-8, 9-12, College/University/Trade School.

Task 2. Update Forecasting Methodology

Provide detailed methodology for forecasts and, where forecasts differ from the State of California Department of Finance (DOF) most current projections, provide detailed explanations and analysis to how the new forecast is superior. Forecast methodology should include an analysis of net migration rates and detailed analysis of how Tulare County's location to the Bay Area, Sacramento, and Southern California will affect future net migration. The consultant should confer with local, regional and state planning agencies to gather input for the updated regional growth forecast.

Task 3. Regional Demographic, Housing, and Employment Forecast Report

Consultant will prepare a draft demographic update report and spreadsheet data to be circulated among the RTP Roundtable Subcommittee members for review and comment. After comments have

been either addressed or incorporated into the draft report, the consultant will prepare the final report. The consultant will be responsible for preparing digital copies of the final report, the preparation of a final presentation, and presenting the report to the TCAG Governing Board.

PART B

Future Trends: Employment, Demographics, and Housing Location Choice

TCAG and the region's local jurisdictions are interested in learning more about the breadth and scale of recent changes brought on by the pandemic and the wide expansion of WFH upon the region's workers, population, and economy. We also want to gain insight into what post-pandemic trends in employment and housing location choice might look like, in order to better understand how these changes may affect the future population and employment growth patterns across the region. The consultant will explain the results and implications of the trend analyses and provide guidance describing how they can be incorporated into the forecasting process.

The following project task outline is intended to provide a framework for an evaluation of regional workers' travel choices and patterns, and future trends in employment, and housing location choice. TCAG is seeking proposers' insights on how best to achieve the purpose. Proposals must present the proposers' current thinking in sufficient detail to demonstrate their understanding of the problem and the soundness of their approach for accomplishing the project purpose. The proposers' effort should address the tasks presented in the task outline and suggest other tasks the proposer deems critical and/or identify alternate approaches to tasks defined in this RFP to achieve the study's purpose.

Data Acquisition

Beyond the results from literature reviews and interviews with relevant subject matter experts, it is anticipated that much of the data required for the analyses are publicly available from the following sources:

- Bureau of Economic Analysis (employment by county and metropolitan area).
- Bureau of Labor Statistics (Quarterly Census of Employment and Wages, Current Employment Statistics, Current Population Survey).
- Census Bureau (decennial censuses, ACS, Household Pulse Survey, Longitudinal Employer-Household Dynamics).

Additional data sources from private companies may be required as well. Below are a few examples (including data that has or will be obtained by TCAG for this project):

- Lightcast (labor market analytics and economic data).
- Woods & Poole Economics (state, region, and county level trends, estimates, and forecasts of employment by industry and key demographic datapoints).
- Point level establishment data (Data Axle, – TCAG will procure).
- Other sources consultant deems appropriate.

For the purposes of this study, TCAG will make available to the consultant relevant data products that the agency has purchased. The consultant may utilize additional public or fee-based sources as needed.

Task 1: Work from Home Adoption and Changes in Employment and Demographics – Trends and Projections

The consultant will provide historical trend analyses and projections (or projections in ranges) for WFH adoption, regional population, households, and total employment, employment by industry, and labor force participation rates. Cumulatively, these analyses will provide insights into the future of work and the economy in the region. The consultant may suggest and include additional datapoints that would support this task. A written report explaining methods and summarizing the findings and implications will be completed and submitted upon completion of the task.

Subtask A: WFH Adoption - Future Rates and Remote/Hybrid split.

WFH had been increasing (slowly) in the years preceding the pandemic – yet still accounted for only a small share of the working arrangements of workers in the region. An important note on this datapoint is that the ACS definition understates the scale of WFH, as it includes only those that WFH as their usual place of work (thus excluding many hybrid WFH workers).

Estimate where WFH adoption rates may settle in the longer term. While the future of WFH adoption is uncertain, the consultant will identify estimates or ranges for WFH adoption by type, based upon literature review, interviews with subject matter experts, and their own professional knowledge.

- For those that WFH, what is the split between remote and hybrid work?
- If hybrid, how many days per week will be WFH? Which days? Which hours?

Remote work allows for many Tulare County region jobs to be filled by workers in other parts of the country/world, and vice versa. How might this new dynamic affect the region’s job and population growth expectations?

- Identify the characteristics of remote and hybrid WFH workers (industry, occupation, age, sex, race)
- Equity considerations:

What do the results of the demographic analysis indicate about the distribution of WFH opportunity for disadvantaged populations?

Are there ways to promote WFH opportunity more equitably?

Subtask B: Development of a Range of Regional Forecasts.

Given the continued uncertainty surrounding inflation, interest rates, and a tight housing market, consultant guidance is desired to provide a potential “low” “mid” and “high” range of total employment, household, and population forecasts at the regional level through year 2050. Forecasts should be provided with a definition of employment that is consistent with that utilized by the TCAG regional travel model.

Average household size is utilized by many member agencies in the development of population forecasts. Consultant assistance is requested to develop projections of future average household size by broad housing type (single-family , multi-family, group quarters) and geography (county, cities and subareas as defined in the TCAG travel model (Figure 1)).

Subtask C: Employment by Industry - Trends and Post-pandemic Projections.

While the pandemic affected employment levels in all industry sectors in the Tulare County region, the direction and scale of change was not uniform. Of those industries experiencing decline over that time-period, some were harder hit than others. For example, the Arts, Entertainment, and Recreation industry saw a 34.0% decline in jobs from 2019 to 2020 while the Professional, Scientific, and Technical Services industry had job loss of only 0.7% (Lightcast 2023.1).

- Develop / analyze region level employment projections by 2-digit NAICS.
- What are the implications of the projected changes to industry mix upon WFH adoption rates and commercial real estate utilization and occupancy?
- Equity considerations: Analyze and report on the demographic characteristics of workers in the industries most heavily affected by the pandemic.

Subtask D: Labor Force Participation Rates (LFPR) - Trends and Post-pandemic Projections.

The LFPR is the percentage of the civilian non-institutional population 16 years and older that is in the labor force (those that are working or actively seeking work). It is a key economic metric as it helps provide an understanding of the relative amount of labor available to fill estimated and forecasted jobs. Labor force participation rates dropped precipitously with the onset of the pandemic. Most, but not all, LFPRs for the nation have trended toward recovery.

- Develop county and region level estimates and projections of LFPRs.
- Identify segments of the population that are driving the changes (age/sex/race).
- Explain differences in the direction of LFPR trends between Tulare County and the nation.

Task 2: Changes in Home Location Choice

For those that can WFH, the reduction in frequency of work commute may lead some to consider living farther from their traditional work location. Utilizing the analysis of recent county level migration patterns, and interviews with local real estate experts, the consultant will address the potential impact of WFH adoption upon home location choice – highlighting the spatial location preferences of WFH workers. The consultant may suggest and include additional sources and datapoints that would support this task. A written report detailing the findings of the analyses and describing the implications will be completed and submitted upon completion of the task.

- Specify the potential impacts of WFH adoption upon home location choice in the short/mid/long term (timing/location/scale). Does WFH influence home location choice at all?
- For the purposes of small area employment allocation in the forecasting process, develop a method to distribute WFH workers to TAZ.

Task 3: Final Report and Presentation

Upon completion of all tasks, the consultant will develop a cohesive and comprehensive final report. The report will tie together the written reports from Part A and Part B and describe the findings, implications, and recommendations. In the report, the consultant will explain the potential application of the findings to local land-use and comprehensive planning efforts, and describe how the analyses of WFH adoption, commercial real estate, and home location choice can inform planning and forecast assumptions.

The report will include appendices or a separate document providing a detailed explanation of the methodology used to develop the analyses contained in the report. Consultant presentations of the findings to the TCAG Governing Board, RTP Roundtable, and to-be-determined advisory committees are expected.

Project Management

The successful bidder shall coordinate with the TCAG Project Manager to schedule and facilitate an initial meeting to launch the work program for the project and clarify roles, project schedule, scope of work, deliverables and project approach. The emphasis of this meeting will be on the Consultant's planned management and technical approach as described in their Work Program. The kickoff meeting will also provide the Consultant with a forum to solicit input from TCAG staff on the individual elements of the project approach and refine the work program as applicable.

The Consultant shall commence work and communicate progress monthly with the TCAG Project Manager, through short (30-60 minute) phone calls or virtual meetings that are scheduled approximately every month throughout the project; coordinate reviews of deliverables; and provide updates to the project manager and TCAG at key milestones (at meetings or through e-mail correspondence). The consultant will prepare documentation (minutes) for all check-in calls and meetings.

Invoices should be prepared and submitted to the TCAG project manager monthly and include a summary of each task or subtask on which progress was made in the billing period.

Attachment B

TITLE 49, CODE OF FEDERAL REGULATIONS, PART 29
DEBARMENT AND SUSPENSION CERTIFICATION

The Consultant, under penalty of perjury, certifies that, except as noted below, he/she or any person associated therewith in the capacity of owner, partner, director, officer, manager:

Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency;

has not been suspended debarred, voluntarily excluded or determined ineligible by any federal agency within the past 3 years;

does not have a proposed debarment pending; and

has not been indicated, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

If there are any exceptions to this certification, insert the exceptions in the following space.

For any exception noted above, indicate below to whom it applies, initiating agency, and dates of actions.

Consultant

Date

EXHIBIT C
PROFESSIONAL SERVICES CONTRACTS
INSURANCE REQUIREMENTS

CONTRACTOR shall provide and maintain insurance for the duration of this Agreement against claims for injuries to persons and damage to property which may arise from, or in connection with, performance under the Agreement by the CONTRACTOR, his agents, representatives, employees and subcontractors, if applicable.

A. Minimum Scope & Limits of Insurance

1. Coverage at least as broad as Commercial General Liability, insurance Services Office Commercial General Liability coverage occurrence form GC 00 01, with limits no less than \$1,000,000 per occurrence including products and completed operations, property damage, bodily injury and personal & advertising injury. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.
2. Insurance Services Office Form Number CA 00 01 covering Automobile Liability of \$1,000,000 per occurrence including any auto or, if the CONTRACTOR has no owned autos, hired and non-owned auto coverage. If an annual aggregate applies it must be no less than \$2,000,000.
3. Workers' Compensation insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.
4. Professional Liability (Errors and Omissions) insurance appropriate to the CONTRACTOR's profession, with limit no less than \$1,000,000 per occurrence or claim, \$2,000,000 aggregate.

B. Specific Provisions of the Certificate

1. If the required insurance is written on a claims made form, the retroactive date must be before the date of the contract or the beginning of the contract work and must be maintained and evidence of insurance must be provided for at least three (3) years after completion of the contract work.
2. CONTRACTOR must submit endorsements to the General Liability reflecting the following provisions:
 - a. *TCAG and the COUNTY OF TULARE, their officers, agents, officials, employees and volunteers are to be covered as additional insureds as respects; liability arising out of work or operations performed by or on behalf of the CONTRACTOR including material, parts, or equipment furnished in connection with such work or operations.*
 - b. *For any claims related to this project, the CONTRACTOR's insurance coverage shall be primary insurance as respects TCAG and the COUNTY OF TULARE, their officers, agents, officials, employees and volunteers. Any insurance or self-insurance maintained by TCAG or THE COUNTY OF TULARE, their officers, agents, officials, employees or volunteers shall be excess of the CONTRACTOR's insurance and shall not contribute with it.*
 - c. *CONTRACTOR hereby grants to TCAG and the COUNTY a waiver of any right to subrogation which any insurer of CONTRACTOR may acquire against the county by virtue of the payment of any loss under such insurance. CONTRACTOR agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the TCAG or the COUNTY has received a waiver of subrogation endorsement from the insurer.*

d. Each insurance policy required by this agreement shall be endorsed to state that coverage shall not be canceled, except after written notice has been provided to TCAG.

3. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of TCAG and the COUNTY OF TULARE for all work performed by the CONTRACTOR, its employees, agents and subcontractors. CONTRACTOR waives all rights against TCAG and the COUNTY, their officers, agents, officials, employees and volunteers for recovery of damages to the extent these damages are covered by the workers compensation and employers liability.

C. Deductibles and Self-Insured Retentions

Deductibles and Self-insured retentions must be declared and any deductible or self-insured retention that exceeds \$100,000 will be reviewed by the TULARE COUNTY Risk Manager for approval.

D. Acceptability of Insurance

Insurance must be placed with insurers with a current rating given by A.M. Best and Company of no less than A-:VII and a Standard & Poor's Rating (if rated) of at least BBB and from a company approved by the Department of Insurance to conduct business in California. Any waiver of these standards is subject to approval by the County Risk Manager.

E. Verification of Coverage

Prior to approval of this Agreement by the TCAG, the CONTRACTOR shall file with the submitting department, certificates of insurance with original endorsements effecting coverage in a form acceptable to TULARE COUNTY. Endorsements must be signed by persons authorized to bind coverage on behalf of the insurer. TCAG and the COUNTY reserve the right to require certified copies of all required insurance policies at any time.

**TULARE COUNTY ASSOCIATION OF GOVERNMENTS
SERVICES AGREEMENT**

[ADD description as desired]

THIS AGREEMENT (“Agreement”) is entered into as of _____, between the **TULARE COUNTY ASSOCIATION OF GOVERNMENTS**, a joint powers authority established under the laws of the State of California (“TCAG”), and _____, [INSERT TYPE OF ENTITY, e.g. a California or other state corporation (see Instructions for more examples)] (“CONTRACTOR”). TCAG and CONTRACTOR are each a “Party” and together are the “Parties” to this Agreement, which is made with reference to the following:

- A.
- B.
- C.

THE PARTIES AGREE AS FOLLOWS:

1. **TERM:** This Agreement becomes effective as of _____ and expires at 11:59 PM on _____ unless earlier terminated as provided below, or unless the Parties extend the term by a written amendment to this Agreement.
2. **SERVICES:** See attached **Exhibits A, A-1, A-2, . . .**
3. **PAYMENT FOR SERVICES:** See attached **Exhibits B, B-1, B-2, . . .**
4. **INSURANCE:** Before approval of this Agreement by TCAG, CONTRACTOR must file with the Clerk of the Board of Supervisors evidence of the required insurance as set forth in the attached **Exhibit C**.
5. **SCHEDULE:** See attached **Exhibit D**
6. **PROJECT STAFF:** add information applicable. Additional project staff are included in **Exhibit E**.
7. **GENERAL AGREEMENT TERMS AND CONDITIONS:** TCAG’S “General Agreement Terms and Conditions” are hereby incorporated by reference and made a part of this Agreement as if fully set forth herein. TCAG’S “General Agreement Terms and Conditions” are in the attached **Exhibit F**.
8. **ADDITIONAL EXHIBITS:** CONTRACTOR shall comply with the terms and conditions of the Exhibits listed below and identified with a checked box, which are by this reference made a part of this Agreement.

<input type="checkbox"/>	Exhibit D	Additional terms and conditions for federally-funded contracts. This Exhibit can be viewed at http://tularecountycounsel.org/default/index.cfm/public-information/
<input type="checkbox"/>	Exhibit 	[Insert name of any other exhibit needed and attach]

9. **NOTICES:** (a) Except as may be otherwise required by law, any notice to be given must be written and must be either personally delivered, sent by facsimile transmission or sent by first class mail, postage prepaid and addressed as follows:

**TULARE COUNTY ASSOCIATION OF GOVERNMENTS
SERVICES AGREEMENT**

[ADD description as desired]

TCAG:

Attn: Ted Smalley
210 N. Church Street, Suite B
Visalia, Ca 93291
Phone No.: (559) 623-0450
Fax No.: (559) 733-6720

CONTRACTOR:

[INSERT CONTRACTOR CONTACT INFO]

Phone No.: _____
Fax No.: _____

(b) Notice personally delivered is effective when delivered. Notice sent by facsimile transmission is deemed to be received upon successful transmission. Notice sent by first class mail will be deemed received on the fifth calendar day after the date of mailing. Either Party may change the above address by giving written notice under this section.

10. SUBCONTRACTING: If this box is checked , CONTRACTOR has indicated it will utilize subcontractors to provide certain services related to this Agreement. CONTRACTOR has selected the following subcontractors ("Subcontractors") to provide the goods or services related to the Agreement:

11. AUTHORITY: CONTRACTOR represents and warrants to TCAG that the individual(s) signing this Agreement on its behalf are duly authorized and have legal capacity to sign this Agreement and bind CONTRACTOR to its terms. CONTRACTOR acknowledges that TCAG has relied upon this representation and warranty in entering into this Agreement.

12. COUNTERPARTS: The Parties may sign this Agreement in counterparts, each of which is an original and all of which taken together form one single document.

[THIS SPACE LEFT BLANK INTENTIONALLY; SIGNATURES FOLLOW ON NEXT PAGE]

**TULARE COUNTY ASSOCIATION OF GOVERNMENTS
SERVICES AGREEMENT**

[ADD description as desired]

THE PARTIES, having read and considered the above provisions, indicate their agreement by their authorized signatures below.

[INSERT CONTRACTOR'S FORMAL NAME]

Date: _____

By _____

Print Name _____

Title _____

Date: _____

By _____

Print Name _____

Title _____

[Pursuant to Corporations Code section 313, TCAG policy requires that contracts with a **Corporation** be signed by both (1) the chairman of the Board of Directors, the president or any vice-president (or another officer having general, operational responsibilities), and (2) the secretary, any assistant secretary, the chief financial officer, or any assistant treasurer (or another officer having recordkeeping or financial responsibilities), unless the contract is accompanied by a certified copy of a resolution of the corporation's Board of Directors authorizing the execution of the contract. Similarly, pursuant to California Corporations Code section 17703.01, TCAG policy requires that contracts with a **Limited Liability Company** be signed by at least two managers, unless the contract is accompanied by a certified copy of the articles of organization stating that the LLC is managed by only one manager.]

TULARE COUNTY ASSOCIATION OF GOVERNMENTS

Date: _____

By _____

,Chairman

ATTEST: Ted Smalley
Executive Director

TULARE COUNTY ASSOCIATION OF GOVERNMENTS'
GENERAL AGREEMENT TERMS AND CONDITIONS
(Revised 05/10/2018)

- 1. COMPLIANCE WITH LAW:** CONTRACTOR must provide services in accordance with applicable Federal, State, and local laws, regulations and directives. With respect to CONTRACTOR'S employees, CONTRACTOR must comply with all laws and regulations pertaining to wages and hours, state and federal income tax, unemployment insurance, Social Security, disability insurance, workers' compensation insurance, and discrimination in employment.
- 2. PAYMENT DOES NOT IMPLY ACCEPTANCE OF WORK:** CONTRACTOR is not entitled to any payments under this Agreement until TCAG confirms that services provided, including any furnished deliverables, satisfy all of the requirements of this Agreement. Payments to CONTRACTOR by TCAG shall not excuse CONTRACTOR from its obligation to replace unsatisfactory deliverables, including equipment, components, materials, or services even if the unsatisfactory character of such deliverables, equipment, components, materials, or services may not have been apparent or detected at the time such payment was made. Deliverables, equipment, components, materials and services that do not conform to the requirements of this Agreement may be rejected by TCAG and in such case must be replaced by CONTRACTOR without delay and at no cost to the TCAG.
- 3. DISALLOWANCE:** If CONTRACTOR requests or receives payment from TCAG for services hereunder, reimbursement for which is later disallowed by the State of California or United States Government, CONTRACTOR shall promptly refund the disallowed amount to TCAG upon TCAG'S request. At its option, TCAG may offset the amount disallowed from any payment due or to become due to CONTRACTOR under this Agreement or any other Agreement between CONTRACTOR and TCAG. CONTRACTOR'S obligations under this section 2 will survive the expiration or termination of this Agreement.
- 4. LIABILITY OF TCAG:** TCAG'S payment obligations under this Agreement shall be limited to the payment of the compensation provided for in section 3, "PAYMENT FOR SERVICES," of this Agreement. Notwithstanding any other provision of this Agreement, in no event shall TCAG be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect, or incidental damages, including, but not limited to, lost profits, arising out of or in connection with this Agreement or the services performed in connection with this Agreement.
- 5. QUALIFIED PERSONNEL:** CONTRACTOR shall utilize only competent personnel under the supervision of, and in the employment of, CONTRACTOR (or CONTRACTOR'S authorized subcontractors) to perform the services. CONTRACTOR will comply with TCAG'S reasonable requests regarding assignment and/or removal of personnel, but all personnel, including those assigned at TCAG'S request, must be supervised by CONTRACTOR. CONTRACTOR shall commit adequate resources to allow timely completion within the project schedule specified in this Agreement.
- 6. INDEPENDENT CONTRACTOR STATUS:** The Parties enter into this Agreement with the express understanding that CONTRACTOR will perform all services required under this Agreement as an independent contractor. The Parties agree that CONTRACTOR and any of its agents, employees, or officers cannot be considered agents, employees, or officers of TCAG.

CONTRACTOR agrees to advise everyone it assigns or hires to perform any duty under this Agreement that they are not employees of TCAG. Subject to any performance criteria contained in this Agreement, CONTRACTOR will be solely responsible for determining the means and methods of performing the specified services and TCAG will have no right to control or exercise any supervision over CONTRACTOR as to how CONTRACTOR will perform the services. As CONTRACTOR is not TCAG'S employee, CONTRACTOR is responsible for paying all required state and federal taxes. In particular, TCAG will not:

- (1) Withhold FICA (Social Security) from CONTRACTOR'S payments.

TULARE COUNTY ASSOCIATION OF GOVERNMENTS'
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- (2) Make state or federal unemployment insurance contributions on CONTRACTOR'S behalf.
- (3) Withhold state or federal income tax from payments to CONTRACTOR.
- (4) Make disability insurance contributions on behalf of CONTRACTOR.
- (5) Obtain unemployment compensation insurance on behalf of CONTRACTOR.

Notwithstanding this independent contractor relationship, TCAG will have the right to monitor and evaluate the performance of CONTRACTOR to assure compliance with this Agreement.

7. LICENSES AND PERMITS: CONTRACTOR represents and warrants that it possesses and will maintain during the term of this Agreement all licenses and permits required for its performance of the services required under this Agreement.

8. GOVERNING LAW: The laws of the State of California, without reference to California conflict of laws principles, govern this Agreement and its interpretation. The Parties agree that this Agreement is made in and will be performed in Tulare County, California.

9. RECORDS AND AUDIT: CONTRACTOR must maintain complete and accurate records with respect to the services rendered and the costs incurred under this Agreement. In addition, CONTRACTOR must maintain complete and accurate records with respect to any payments to employees or subcontractors. All of the records must be prepared in accordance with generally accepted accounting procedures, must be clearly identified, and must be kept readily accessible. Upon request, CONTRACTOR must make the records available within Tulare County to the Auditor of Tulare County and to his or her agents and representatives, for the purpose of auditing and/or copying the records for a period of five (5) years from the date of final payment under this Agreement. Additional record-keeping requirements may be located in Exhibit F or G (related to federally-funded contracts generally, or FTA-funded contracts specifically).

10. CONFLICT OF INTEREST:

(a) At all times during the performance of this Agreement, CONTRACTOR must comply with the law of the State of California regarding conflicts of interests and appearance of conflicts of interests, including, but not limited to, Government Code Section 1090 *et seq.*, and the Political Reform Act, Government Code Section 81000 *et seq.*, and regulations promulgated by the California Fair Political Practices Commission. The statutes, regulations, and laws previously referenced include, but are not limited to, prohibitions against any public officer or employee, including CONTRACTOR for this purpose, from making any decision on behalf of TCAG in which the officer, employee, or consultant/contractor has a direct or indirect financial interest. A violation can occur if the public officer, employee, or consultant/contractor participates in or influences any TCAG decision that has the potential to confer any pecuniary benefit on CONTRACTOR or any business firm in which CONTRACTOR has an interest, with certain narrow exceptions.

(b) CONTRACTOR agrees that if any facts come to its attention that raise any questions as to the applicability of conflicts of interests laws, then it will immediately inform TCAG and provide all information needed for resolution of this question.

11. INSURANCE: The attached **Exhibit C** outlines the minimum scope, specifications, and limits of insurance required under this Agreement. Additional insured endorsements required as outlined in **Exhibit C** cannot be used to reduce limits available to TCAG as an additional insured from CONTRACTOR'S full policy limits. Insurance policies cannot be used to limit liability or to limit the indemnification provisions and requirements of this Agreement or

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act in any way to reduce the policy coverage and limits available from the insurer(s). If CONTRACTOR fails to maintain or renew coverage, or to provide evidence of renewal, then TCAG may consider that failure a material breach of this Agreement. TCAG may also withhold any payment otherwise due to CONTRACTOR for failure to provide evidence of renewal until CONTRACTOR provides such evidence.

12. INDEMNIFICATION AND DEFENSE:

(a) To the fullest extent permitted by law, CONTRACTOR must indemnify, defend (at CONTRACTOR'S sole cost and expense and with legal counsel approved by TCAG, which approval may not be unreasonably withheld), protect and hold harmless TCAG, all subsidiaries, divisions, committee, and affiliated agencies of TCAG, and all of their representatives, partners, designees, officers, directors, employees, consultants, agents, successors, and assigns, (each, an "Indemnified Party" and collectively, the "Indemnified Parties"), from and against all claims (including, without limitation, claims for bodily injury, death or damage to property), demands, obligations, damages, actions, causes of action, suits, losses, judgments, fines, penalties, liabilities, costs, and expenses (including, without limitation, attorneys' fees, disbursements, and court costs, and all other professional expert or consultants' fees and costs and TCAG general and administrative expenses) of every kind and nature whatsoever (individually, a "Claim"; collectively, "Claims") which may arise out of, pertain to, or relate (directly or indirectly) to the negligence, recklessness, or misconduct of CONTRACTOR with respect to any work performed or services provided under this Agreement (including, without limitation, the acts, errors, and/or omissions of CONTRACTOR, its principals, officers, agents, employees, vendors, suppliers, consultants, sub-consultants, contractors, and anyone employed directly or indirectly by any of them, or for whose acts they may be liable, or any or all of them). CONTRACTOR'S obligation to indemnify applies unless it is finally adjudicated that the liability was caused by the sole active negligence or sole willful misconduct of an Indemnified Party. If it is finally adjudicated that liability is caused by the comparative active negligence or willful misconduct of an Indemnified Party, then CONTRACTOR'S indemnification obligation shall be reduced in proportion to the established comparative liability.

(b) The duty to defend is a separate and distinct obligation from CONTRACTOR'S duty to indemnify. CONTRACTOR shall be obligated to defend, in all legal, equitable, administrative, or special proceedings, the Indemnified Parties immediately upon tender to CONTRACTOR of the Claim in any form or at any stage of an action or proceeding, whether or not liability is established. Payment to CONTRACTOR by any Indemnified Party or the payment or advance of defense costs by any Indemnified Party cannot be a condition precedent to enforcing the Indemnified Party's rights to indemnification under this Agreement. An allegation or determination that persons other than CONTRACTOR are responsible for the Claim does not relieve CONTRACTOR from its separate and distinct obligation to defend under this section. The obligation to defend extends through final judgment, including exhaustion of any appeals. The defense obligation includes an obligation to provide independent defense counsel if CONTRACTOR asserts that liability is caused in whole or in part by the negligence or willful misconduct of an Indemnified Party. If it is finally adjudicated that liability was caused by the comparative active negligence or willful misconduct of an Indemnified Party, then CONTRACTOR may submit a claim to the TCAG for reimbursement of reasonable attorneys' fees and defense costs in proportion to the established comparative liability of the Indemnified Party. CONTRACTOR'S indemnification obligations under this Agreement will survive the expiration or earlier termination of this Agreement until action against the Indemnified Parties for the matter indemnified is fully and finally barred by the applicable statute of limitations or statute of repose. CONTRACTOR'S liability for indemnification under this Agreement is in addition to any liability CONTRACTOR may have to TCAG for a breach by CONTRACTOR of any of the provisions of this Agreement. Under no circumstances may the insurance requirements and limits set forth in this Agreement be construed to limit CONTRACTOR'S indemnification obligation or other liability under this Agreement. The terms of this Agreement are contractual and the result of negotiation between the Parties.

TULARE COUNTY ASSOCIATION OF GOVERNMENTS'
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(c) CONTRACTOR must indemnify and hold TCAG harmless from all loss and liability, including attorneys' fees, court costs and all other litigation expenses, for any infringement of the patent rights, copyright, trade secret or any other proprietary right or trademark, and all other intellectual property claims of any person or persons in consequence of the use by TCAG, or any of its officers or agents, of articles or services to be supplied in the performance of this Agreement.

13. TERMINATION:

(a) **Without Cause:** TCAG may terminate this Agreement without cause by giving thirty (30) days' prior written notice to CONTRACTOR of its intention to terminate under this provision, specifying the date of termination. TCAG will pay to CONTRACTOR the compensation earned for work satisfactorily performed and not previously paid for to the date of termination. TCAG will not pay lost anticipated profits or other economic loss. The payment of any compensation is subject to the restrictions on payment of compensation otherwise provided in this Agreement, and is conditioned upon receipt from CONTRACTOR of all plans, specifications and estimates, and other documents prepared by CONTRACTOR in accordance with this Agreement. TCAG will not impose sanctions on CONTRACTOR under these circumstances.

(b) **With Cause:** Either Party may terminate this Agreement immediately, by written notice to the other Party, should the other Party:

- (1) Be adjudged a bankrupt, or
- (2) Become insolvent or have a receiver appointed, or
- (3) Make a general assignment for the benefit of creditors, or
- (4) Suffer any judgment that remains unsatisfied for 30 days, and that would substantively impair the ability of the judgment debtor to perform under this Agreement, or
- (5) Materially breach this Agreement.

In addition, TCAG may terminate this Agreement based on:

- (6) Material misrepresentation, either by CONTRACTOR or anyone acting on CONTRACTOR'S behalf, as to any matter related in any way to TCAG'S retention of CONTRACTOR, or
- (7) Other misconduct or circumstances that, in the sole discretion of TCAG, either impairs the ability of CONTRACTOR to competently provide the services under this Agreement, or exposes TCAG to an unreasonable risk of liability.

For any of the occurrences except item (5) above, termination may be effected upon written notice by the terminating Party specifying the date of the termination. If CONTRACTOR fails to perform according to the terms and conditions of this Agreement, then TCAG may, in addition to any other remedy it may have, issue a declaration of default after 10 days' written notice to CONTRACTOR.

Upon a material breach, the Agreement may be terminated after the failure of the defaulting Party to remedy the breach to the satisfaction of the non-defaulting Party within 5 days of written notice specifying the breach. If the breach is not remedied within that 5-day period, then the non-defaulting Party may terminate this Agreement on further written notice specifying the date of termination. If the nature of the breach is such that it cannot be cured within a 5-day period, then the defaulting Party may submit a written proposal within that period which sets forth a specific means to resolve the default. If the non-defaulting Party consents to that proposal in writing, which consent may not be unreasonably withheld, then the defaulting Party must immediately embark on its plan to

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cure the default or breach. If the default or breach is not cured within the time agreed, then the non-defaulting Party may terminate this Agreement upon written notice specifying the date of termination.

TCAG will pay to CONTRACTOR the compensation earned for work satisfactorily performed and not previously paid for to the date of termination. The payment of such compensation is subject to the restrictions on payment of compensation otherwise provided in this Agreement, and is conditioned upon receipt from CONTRACTOR of all plans, specifications and estimates, and other documents prepared by CONTRACTOR by the date of termination in accordance with this Agreement. TCAG will not pay lost anticipated profits or other economic loss, nor will TCAG pay compensation or make reimbursement to cure a breach arising out of or resulting from such termination. If TCAG terminates this Agreement for cause and the expense of finishing CONTRACTOR’S scope of work exceeds the unpaid balance of the Agreement, then CONTRACTOR must pay the difference to TCAG. TCAG may impose sanctions under these circumstances, which may include possible rejection of future proposals based on specific causes of CONTRACTOR’S non-performance.

(c) **Effects of Expiration or Termination:** Expiration or termination of this Agreement will not terminate any obligations to indemnify, to maintain and make available any records pertaining to the Agreement, to cooperate with any audit, to be subject to offset, or to make any reports of pre-termination contract activities. Where TCAG terminates CONTRACTOR’S services, that termination will not affect any rights of TCAG to recover damages against CONTRACTOR.

(d) **Suspension of Performance:** Independent of any right to terminate this Agreement, the Executive Director of TCAG may immediately suspend performance by CONTRACTOR, in whole or in part, in response to health, safety or financial emergency, or a failure or refusal by CONTRACTOR to comply with the provisions of this Agreement, until such time as the cause for suspension is resolved, or a notice of termination becomes effective.

14. LOSS OF FUNDING: It is understood and agreed that if TCAG’S funding is either discontinued or reduced for the services to be provided hereunder, then TCAG will have the right to terminate this Agreement under section 13 (a) (“Termination Without Cause”) as of the end of the term for which funds are appropriated. Such termination shall be without penalty, liability, or expense to TCAG of any kind, provided that TCAG shall pay CONTRACTOR in accordance with section 13 (a) for services satisfactorily performed prior to the date of such termination and to the extent funds have been appropriated for such payment.

15. SUBMITTING FALSE CLAIMS; MONETARY PENALTIES: Under applicable federal and state law, if CONTRACTOR submits a false claim to TCAG under this Agreement, then CONTRACTOR will be liable to TCAG for the statutory penalties set forth in those statutes, including but not limited to statutory fines, treble damages, costs, and attorneys’ fees. CONTRACTOR will be deemed to have submitted a false claim to TCAG if CONTRACTOR:

- (a) Knowingly presents or causes to be presented to TCAG a false claim or request for payment or approval;
- (b) Knowingly makes, uses, or causes to be made or used a false record or statement to get a false claim paid or approved by TCAG;
- (c) Conspires to defraud TCAG by getting a false claim allowed or paid by TCAG;
- (d) Knowingly makes, uses, or causes to be made or used a false record or statement to conceal, avoid, or decrease an obligation to pay or transmit money or property to TCAG; or

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(e) Is a beneficiary of an inadvertent submission of a false claim to TCAG, later discovers the falsity of the claim, and fails to disclose the false claim to TCAG within a reasonable time after discovery of the false claim.

16. FORM DE-542: If CONTRACTOR is an individual, CONTRACTOR acknowledges that this Agreement is subject to filing obligations under Unemployment Insurance Code Section 1088.8. Accordingly, TCAG has an obligation to file a report with the Employment Development Department, which report will include CONTRACTOR'S full name, social security number, address, the date this Agreement was executed, the total amount of the Agreement, its expiration date or whether it is ongoing. CONTRACTOR agrees to cooperate with TCAG to make that information available and to complete Form DE- 542. Failure to provide the required information may, at TCAG'S option, prevent approval of this Agreement, or be grounds for termination by TCAG.

17. WORKS FOR HIRE: CONTRACTOR acknowledges that all work(s) under this Agreement are "work(s) for hire" within the meaning of the United States Copyright Act (Title 17 United States Code) and hereby assigns to TCAG all rights and interests CONTRACTOR may have in the work(s) it prepares under this Agreement, including any right to derivative use of the work(s). All software and related materials developed by CONTRACTOR in performance of this Agreement for TCAG will be the sole property of TCAG, and CONTRACTOR hereby assigns and transfers all its right, title, and interest therein to TCAG. CONTRACTOR will execute all necessary documents to enable TCAG to protect TCAG'S intellectual property rights under this section.

18. WORK PRODUCT: All work product, equipment, or materials created for TCAG or purchased by TCAG under this Agreement belong to TCAG and CONTRACTOR must immediately deliver them to TCAG at TCAG'S request upon termination or completion of this Agreement.

19. TIME OF ESSENCE: The Parties agree that time is of the essence under this Agreement, unless they agree otherwise in writing.

20. CONFIDENTIALITY: CONTRACTOR may not use or disclose any information it receives from TCAG under this Agreement that TCAG has previously identified as confidential or exempt from mandatory public disclosure except as necessary to carry out the purposes of this Agreement or as authorized in advance by TCAG. Unless required to do so by law, including, but not limited to, the Ralph M. Brown Act or the California Public Records Act, TCAG may not disclose to third parties any information it receives from CONTRACTOR that CONTRACTOR has previously identified as confidential. If TCAG determines that it must disclose any information that CONTRACTOR previously identified as confidential, then it shall promptly give CONTRACTOR written notice of its intention to disclose such information and the authority for such disclosure. CONTRACTOR shall have period of five (5) calendar days thereafter within which to seek a protective court order to prevent such disclosure or to notify TCAG that it will not seek such an order. TCAG shall cooperate with CONTRACTOR in any efforts to seek such a court order. TCAG shall not disclose the information until the five (5) day period has expired without a response from CONTRACTOR, or CONTRACTOR has notified TCAG that it will not seek such an order, or CONTRACTOR has sought and a court has declined to issue a protective order for such information. If CONTRACTOR seeks a protective order for such information, CONTRACTOR shall defend and indemnify TCAG from any and all loss, injury, or claim arising from TCAG'S withholding of the information from the requestor. This includes any attorney's fees awarded to the requestor. The duty of TCAG and CONTRACTOR to maintain confidentiality of information under this section continues beyond the term of this Agreement.

21. ASSIGNMENT/SUBCONTRACTING: Unless otherwise provided in this Agreement, TCAG is relying on the personal skill, expertise, training and experience of CONTRACTOR and CONTRACTOR'S employees and no part of this

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Agreement may be assigned or subcontracted by CONTRACTOR without the prior written consent of TCAG, which consent TCAG may grant, delay, deny, or condition in its absolute discretion.

22. DISPUTES AND DISPUTE RESOLUTION: CONTRACTOR shall continue with its responsibilities under this Agreement during any dispute. If a dispute arises out of or relating to this Agreement, or the breach of the Agreement, and if the dispute cannot be settled through negotiation, then the Parties agree first to try in good faith to settle the dispute by non-binding mediation, to be held in Tulare County, California, before resorting to litigation or some other dispute resolution procedure, unless the Parties mutually agree otherwise. The Parties must mutually select the mediator, but in case of disagreement, then the Parties will select the mediator by lot from among two nominations provided by each Party. The Parties will split equally all costs and fees required by the mediator; otherwise each Party will bear its own costs of mediation. If mediation fails to resolve the dispute within 30 days, then either Party may pursue litigation to resolve the dispute.

23. PROPERTY TAXES: Under the terms of California Revenue and Taxation Code section 107.6 (possessory interest tax), CONTRACTOR’S possession or use of any TCAG-owned real property under this Agreement may create a “possessory interest” in the real property. If a possessory interest is created, then it may be subject to property taxation and CONTRACTOR may be subject to the payment of property taxes on that possessory interest.

24. FURTHER ASSURANCES: Each Party will execute any additional documents and perform any further acts that may be reasonably required to effect the purposes of this Agreement.

25. CONSTRUCTION: This Agreement reflects the contributions of all Parties and so the provisions of Civil Code section 1654 will not apply to address and interpret any alleged uncertainty or ambiguity.

26. HEADINGS: Section headings are provided for organizational purposes only and do not in any manner affect the scope, meaning, or intent of the provisions under the headings.

27. NO THIRD-PARTY BENEFICIARIES INTENDED: Unless specifically set forth, the Parties to this Agreement do not intend to provide any other party with any benefit or enforceable legal or equitable right or remedy.

28. WAIVERS: The failure of either Party to insist on strict compliance with any provision of this Agreement will not be considered a waiver of any right to do so, whether for that breach or any later breach. The acceptance by either Party of either performance or payment will not be considered a waiver of any preceding breach of the Agreement by the other Party.

29. ORDER OF PRECEDENCE: In the event of any conflict or inconsistency between or among the body of the Agreement (which includes these “General Agreement Terms and Conditions”) and any Exhibit, Schedule, or Attachment, then the terms and conditions of the body of the Agreement shall prevail.

30. CONFLICT WITH LAWS OR REGULATIONS/ SEVERABILITY: This Agreement is subject to all applicable laws and regulations. If any provision of this Agreement is found by any court or other legal authority, or is agreed by the Parties to be, in conflict with any code or regulation governing its subject matter, only the conflicting provision will be considered null and void. If the effect of nullifying any conflicting provision is such that a material benefit of the Agreement to either Party is lost, then the Agreement may be terminated at the option of the affected Party. In all other cases, the remainder of the Agreement will continue in full force and effect.

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31. ENTIRE AGREEMENT: This Agreement represents the entire agreement between CONTRACTOR and TCAG as to its subject matter and no prior oral or written understanding will be of any force or effect. No part of this Agreement may be modified without the written consent of both Parties.

32. ASSURANCES OF NON-DISCRIMINATION: CONTRACTOR must not discriminate in employment or in the provision of services based any characteristic or condition upon which discrimination is prohibited by state or federal law or regulation. The Parties recognize that both CONTRACTOR and TCAG have the responsibility to protect TCAG employees and clients from unlawful activities, including discrimination and sexual harassment in the workplace. Accordingly, CONTRACTOR agrees to provide appropriate training to its employees regarding discrimination and sexual harassment issues, and to promptly and appropriately investigate any allegations that any of its employees may have engaged in improper discrimination or harassment activities. TCAG, in its sole discretion, has the right to require CONTRACTOR to replace any employee who provides services of any kind to TCAG under this Agreement with other employees where TCAG is concerned that its employees or clients may have been or may be the subjects of discrimination or harassment by such employees. TCAG'S right to require replacement of employees under this section does not preclude TCAG from terminating this Agreement with or without cause as provided for under this Agreement. Additional nondiscrimination requirements may be located in Exhibit F or G (related to federally-funded contracts generally, or FTA-funded contracts specifically).

33. DRUG-FREE WORKPLACE POLICY: CONTRACTOR acknowledges that under the Federal Drug-Free Workplace Act of 1989 and the California Drug-Free Workplace Act of 1990, the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited on TCAG premises. CONTRACTOR agrees that any violation of this prohibition by CONTRACTOR, its employees, agents, or assigns will be deemed a material breach of this Agreement.

34. RECYCLED PAPER CONTENT: To the extent CONTRACTOR'S services under this Agreement include printing services, pursuant to Public Contract Code section 22153, CONTRACTOR shall use paper that meets the recycled content requirements of Public Contract Code section 12209.