

RFP-2024-0822
Exhibit F- Scope of Work

DEFINITIONS:

- **“Climate Commitment Act (CCA)”** The Climate Commitment Act (CCA) caps and reduces greenhouse gas emissions from Washington’s largest emitting sources and industries, allowing businesses to find the most efficient path to lower carbon emissions. This powerful program works alongside other critical climate policies to help Washington achieve its commitment to reducing greenhouse gas emissions by 95% by 2050.
- **“E-Bike”** shall mean an electric-assist bicycle as defined by [RCW 46.04.169](#) but does not include mountain bikes
- **“Qualifying equipment and services”** shall mean a bicycle helmet, safety vest, bicycle light or bicycle lock and any maintenance or other services agreed upon by the qualifying retailer and qualifying individual at the time of the purchase. Qualifying equipment and services must be purchased as part of the same transaction as the e-bike.
- **“Qualifying retailer”** shall mean a retail business establishment with one or more physical retail locations in Washington state that provides on-site e-bike sales, service, and repair and has entered into an agreement with the vendor to participate in the E-bike rebate program on behalf of WSDOT.
- **“Rebate”** shall mean the amount paid to the participating bike shop for accepting the voucher.
- **“Rebate recipient”** shall mean a qualifying bike retailer.
- **“Voucher”** shall mean proof of eligible program participation with maximum dollar amount that a bike shop can accept as payment during a transaction for an eligible E-bike and eligible accessories. No more than one voucher may be awarded per household.
- **“Voucher recipient”** means an individual who resides in Washington state, is at least 16 years of age, and has applied correctly through the vendor’s website and has been allocated a voucher to redeem against the cost of an E-bike and qualifying equipment and services through a qualifying retailer.
- **“Vendor”** shall mean the ASB, its employees and agents. Vendor also includes any firm, provider, organization, individual, or other entity performing the business activities under this Contract. It shall also include any Subcontractor retained by Vendor as permitted under the terms of this Contract.

As this is a Pilot Project, this Scope of Work is subject to change. The State of Washington reserves the right to deconstruct, separate, remove, modify, or add different sections of this work for the purposes of cost, time, efficiency, and overall project goals.

DUTIES AND REQUIREMENTS:

1. Washington State Department of Transportation (WSDOT) is responsible for the following:
 - a. Selecting the Contractor
 - b. Hosting a Kick-Off Meeting with Project Team and relevant WSDOT staff to clarify roles and responsibilities, discuss timeline, and outline expectations for Project deliverables and procedures.

- c. Providing policy direction and reviewing proposed drafts of the implementation manual in consultation with the Contractor
- d. Providing security design reviews regarding use of personal identification data, and digital tools
- e. Providing communications direction on Climate Commitment Act (“CCA”) branding guidelines.
- f. Participating in regular meetings with the Contractor to discuss Project refinement and guide Project implementation.
- g. Reviewing and approving Project elements provided by the Contractor, such as the implementation manual, WE-Bike rebate program webpage, voucher verification methods and progress reports.
- h. Reviewing, approving, or returning all invoices for program costs and rebate requests
- i. Distributing program funds to the vendor
- j. Providing Project oversight and accountability (in conjunction with the grantee)
- k. Coordinating with the University of Washington and Contractor on reporting and impacts of the program.

2. The Contractor is responsible for the following:

- a. Implementation of WE-Bike rebate program as approved by the legislator in ESHB 1125. The Contractor’s responsibilities encompass three phases to ensure the efficient and proper distribution of incentives for eligible electric bicycles: Project development, Project implementation, and Project reporting. These phases are to be completed in a manner directed by WSDOT and on a timeframe as stated in the grant agreement. Any external documents produced with these funds must adhere to Climate Commitment Act (“CCA”) branding guidelines.
- b. Paying bike shops within 30 days of a voucher being redeemed.
- c. Ensuring the platform hosting the website and rebate applications has sufficient bandwidth to receive high volumes of traffic from launch day and throughout.
- d. Beta testing the software and platform capabilities prior to going live and mitigating any technical issues to ensure a successful launch.
- e. The Contractors’ tasks include, but are not limited to:

A. Program Planning and Development

1. Participate in a kickoff meeting with WSDOT.
2. Consistent with legislative proviso ESHB 1125 Section 310.16, and in consultation with WSDOT, assist with program design, including performance metrics and systems for establishing eligibility and associated voucher/rebate amounts as required under the legislative proviso establishing the program and equity approaches for program launch and implementation.
3. Throughout the contract term and in consultation with WSDOT, develop, update, and finalize both the WE-Bike program Terms and Conditions and the Implementation Manual.
4. Design and implement a voucher mechanism that provides the qualifying individual with the correct voucher amount in a format that can be redeemed at the time of purchase at a qualifying retailer.

5. Coordinate with WSDOT as necessary to ensure streamlined implementation of all processes in a way that is easy for consumers and bike shop retailers to understand.
6. Identify and qualify electric bicycle retailers authorized to submit rebate requests and receive WE-Bike rebate payments.
7. Develop verification systems and processes for qualified retailers to ensure that bicycles and batteries purchased with a WE-Bike voucher are UL 2849 and UL 2271 approved; bicycle, battery and components carry a one-year warranty; and the consumer receives a fully assembled bicycle.
8. Participate in WSDOT approved events (e.g. press events, conferences, forums, symposiums etc.) to represent WE-Bike program.
9. Provide information to WSDOT upon request including, but not limited to, the following:
 - a) Barriers and potential solutions for program implementation.
 - b) Recommendations to improve the effectiveness of WE-Bike program investments.
 - c) Document findings and report to WSDOT.
10. Meet all applicable requirements of the following: any applicable statutes including HB1125 section 310.16 RCW 46.04.169 all applicable Funding Plans; this competitive solicitation: Sample Contract; the final Contract; and the WE-Bike program Implementation Manual, including any future updates and/or revisions issued during the Contract term. The successful bidder must also ensure any subcontractors meet all the aforementioned requirements, as applicable.
11. WSDOT reserves the right to request participation from voucher recipients in ongoing research efforts that support the WE-Bike rebate program efforts. The Contractor shall work with the University of Washington or other designated entities for research activities that may include surveys for e-bike owners and unsuccessful applicants, voluntary participation in mobile tracking, and/or travel diaries for voucher recipients to collect bicycle use data and other information. WSDOT will coordinate with the Contractor and the research institution to identify survey parameters and determine the most effective mechanism(s) for obtaining information and maintaining protection of participant personally identifying information.
12. Develop and implement the technological infrastructure to support application processes for vouchers. Required elements of the process include:
 - a) Sufficient bandwidth of the technology platform to support high traffic from launch day and throughout.
 - b) Clear and user-friendly explanation of application process.
 - c) Collection from all applicants of contact and demographic information required under the proviso establishing the program for purposes of research and evaluation, in a form that is safe and suitable for transmittal to a research activity approved by WSDOT.
 - d) Processes for verification of Washington state residency and household income to confirm eligibility for income-based vouchers.
 - e) Acknowledgement to applicant of successful completion and submission of the application, in a format they can download and save.
 - f) Process for distribution of uniquely identified vouchers that can be verified online by bike retailers, including a provision for vouchers to expire within a time span to be agreed upon with WSDOT if they go unused so the value can pass to another applicant.
 - g) System for distribution of follow-up emails to applicants to provide them with

information concerning selection and safe operation of e-bikes, Washington state bicycling laws, and other relevant information developed or approved by WSDOT, as well as the outcome of their individual application.

B. Education and Outreach

1. Develop/collaborate on / maintain a user-friendly public website that may be hosted by the Consultant, WSDOT, or by a WSDOT approved third party. The website and all content posted thereto must be ADA-compliant, in accordance with the Web Content Accessibility Guidelines 2.0 or a subsequent version, published by the Web Accessibility Initiative of the World Wide Web Consortium at a minimum Level AA success criterion. The website must include, at a minimum:
 - a) General Project information and instructions on how to participate.
 - b) Lists of participating retailers, their locations and contact information.
 - c) Details of any outreach or education efforts.
 - d) Program statistics including but not limited to a visual representation of where vouchers are being requested and/or disbursed with a mapping tool.
 - e) A definition of eligible electric bicycles and related equipment.
 - f) Information about eligibility, voucher amounts and how they are determined.
 - g) Applicable documents and forms related to the Project.
2. Provide translations of public-facing information in languages to be identified by WSDOT under the agency's Language Access Plan. These materials must include, but are not limited to, the following:
 - a) Website.
 - b) Eligibility guidelines.
 - c) Application process.
 - d) Terms and conditions
 - e) Agreement forms.
 - f) Frequently asked questions
 - g) Contact information.
3. Coordinate with WSDOT to enable prompt response to legislative and public requests regarding the WE-Bike program.
4. Train and approve electric bicycle retailers for participation in the WE-Bike rebate program based upon eligibility criteria identified in the Implementation Manual.
5. Provide WSDOT with data results including:
 - a) Program statistics to be defined by WSDOT, which may include rebate statistics, including rebates requested and redeemed; available and expended funds; participating bike shops; and other statistics.
 - b) A visual representation of where rebates are being requested and/or disbursed with a mapping tool.
 - c) User survey data to display selected information upon request by WSDOT

C. Rebate Distribution and Processing

1. Ensure participating electric bicycle manufacturers, electric bicycle retailers, and electric bicycle purchasers meet all applicable WE-Bike program requirements.
 - a. Contractor will develop a process, in collaboration with WSDOT, to certify

- participating bike shops.
 - b. Contractor will enter into agreements with bike shops eligible for certification.
 - c. Contractor will ensure bike shops provide point of sale voucher redemption for eligible participants and report voucher redemption promptly for payment.
2. Ensure retailers are reviewing required documentation prior to voucher redemption. Documents include, but are not limited to, the following:
 - a) Signed Final Purchase Agreement – must show the final purchase price less the voucher amount. It must also provide line items listing:
 - i. Electric bicycle or equipment base price.
 - ii. Sale price of any other equipment supported by WE-Bike program.
 - iii. Voucher discount, including all qualifying equipment and services.
 - iv. All applicable taxes and fees.
 3. Ensure bike shops submit vouchers for reimbursement to vendor within 36 hours.
 4. Use the criteria in the Implementation Manual to review and approve or disapprove rebate requests and document this process in each Project file.
 5. Require the purchaser and electric bicycle retailer to sign and date the WE-Bike program Request Form in an acceptable form, which may include electronic signatures.
 6. Establish and implement safeguards to ensure WE-Bike program participants (i.e., electric bicycle purchasers and electric bicycle retailers) conform to all applicable terms and conditions set forth in the Implementation Manual.
 7. Distribute rebate payments to electric bicycle retailers within 30 days of rebate being redeemed, for eligible electric bicycle and equipment purchases on receipt of a completed Rebate Request Form.
 8. Develop and maintain accounting procedures to track funding expenditures and reservation by month, quarter, and fiscal year.
 9. Establish and implement a process for returned voucher funds because of prorated returns, cancellations, etc., that will allow for e-bike awards of new vouchers to other applicants.
 10. Establish and implement a waiting list if the Project becomes oversubscribed and WSDOT determines a waiting list is appropriate.
 11. If appropriate, report to WSDOT concerning rebate and voucher recipients at risk of not meeting the WE-Bike program requirements. Include recommendations for program changes to better ensure that legislative requirements, including one rebate per household, are met.

D. Recordkeeping and Reporting

1. Establish and maintain incentive and fulfillment tracking systems and records.
2. Utilize security best practices to maintain the confidentiality, integrity, and availability of systems, data, and any physical records. Security controls must meet or exceed requirements identified in WA state laws, WaTech's IT Security Policies ([Policies | WaTech](#)), and WSDOT's Policies and standards. A WSDOT TSD Cybersecurity review will be required.
3. Initiate a security design review with WSDOT IT staff.
4. Develop a systematic process and schedule to back-up WE-Bike program database(s)

each day, at a minimum.

5. Develop and enforce security measures to safeguard systems interacting with the WE-Bike program database(s). Measures must undergo WSDOT TSD Cybersecurity review.
6. Provide data updates to WSDOT upon request, which could include all voucher and rebate records.
7. Following procedures that meet the requirements for WSDOT as a public agency for records disclosure, provide information, upon request, to individuals or organizations that wish to request that WSDOT review an application denial.
8. If necessary, the Consultant shall support WSDOT's program stewardship efforts, including the recapturing of funds, by providing WSDOT with any purchaser information, documents, data, or other material needed to investigate or carry out such efforts.
9. Provide periodic data summaries for reporting to the public via a method approved by WSDOT.
10. Accurately track key project metrics and report to WSDOT (on a monthly basis) including (at a minimum)
 - Number of each class of e-bike purchased (Class 1, Class 2, or Class 3)
 - Manufacturer of e-bikes purchased.
 - Number of voucher applications received.
 - Number of vouchers:
 - issued to low-income community residents
 - redeemed by low-income community residents
 - issued to non-low-income community residents
 - redeemed by non-low-income community residents
 - redeemed for additional incentives (if applicable), e.g. for e-cargo bikes, and/or equipment
 - Total dollar amount of vouchers
 - issued to low-income community residents
 - redeemed by low-income community residents
 - issued to non-low-income community residents
 - redeemed by non-low-income community residents
 - redeemed for additional incentives (if applicable), e.g. for e-cargo bikes, and/or equipment

E. Transition

1. Once the term of the WE-Bike rebate program Contract has ended, the Consultant shall deliver all Project data to WSDOT or the subsequent Consultant in a format approved by WSDOT.
2. Develop and execute a Project transfer plan, as part of the Consultant's closeout duties, to ensure a complete and timely transfer of data and website to the next administrator on a timely basis. The Project transfer plan, which will be approved by WSDOT, includes at a minimum the following tasks:
 - a.) Process all incentives for the time frame covered by the Contract then in effect.
 - b.) Complete all tasks associated with the WE-Bike rebate program closeout.
 - c.) Ensure a system to process all outstanding vouchers/rebates up to the end of the Contract term or until the subsequent Consultant is selected and prepared to process vouchers/rebates; and

- d.) If applicable, transfer WE-Bike program systems, data and website to a new Consultant selected by WSDOT according to the agreed upon transfer plan.
- e.) Provide WSDOT with a Final Report that summarizes and evaluates total fund expenditures, electric bicycles funded, outreach efforts, and implementation challenges per source of funding and recommends potential program improvements.
- f.) Provide WSDOT with all webpages, databases, software or other intellectual property developed or purchased by the Consultant for the purposes of administering or implementing WE-Bike program, if requested.

F. BIDDER QUALIFICATIONS

Please review and respond to these, in Exhibit B - Performance Requirements. Include a copy of any applicable required licenses or verification documentation (e.g. for nonprofits a copy of your IRS determination letter).

1. **REQUIRED**

- a. Experience working with government and/or research institutions on data gathering.
- b. Experience writing and implementing Project plans.
- c. Capable of delivering equitable programming and has experience adhering to relevant legislation and policy.
- d. Demonstrated successful past performance bringing Projects in on time, through submittal of documentation of relevant qualifications and experience.
- e. Demonstrated resources and capacity to execute this Project successfully.
- f. Ability to reimburse bike shop partners within 30 days of rebate being redeemed.
- g. Submit references from a minimum of three organizations that were provided services within the past five years that are alike in type and scope to the services within the solicitation. References shall include the organization's name, point of contact, telephone number, and dates services were performed. The response may be disqualified if WSDOT is unable to verify qualification and experience requirements from the respondent's references. The response may be disqualified if WSDOT receives negative responses, as solely determined by WSDOT.
- h. Submit resumes and references for staff and Contractors who will provide services under the WE-Bike rebate program contract. This should include the person's name and title, qualifications including the number of years' experience performing duties similar to those in the WE-Bike rebate program.
- i. Submit a comprehensive implementation plan.
- j. Submit a detailed contingency plan for risks and mitigation.

2. **DESIRABLE**

- a. Experience developing IT systems to meet Project needs and high traffic.
- b. Experience working with E-bike manufacturers, and/ or bike retailers (or equivalent) and / or other key Project related interested parties.
- c. Experience with E-bikes and /or commute trip reduction goals.

- d. Development of incentive Projects (such as developing tools, processes, materials etc.)
- e. Day-to-Day implementation of rebate Projects.

G. OVERVIEW OF KEY DELIVERABLES

Phase 1

1. Implementation manual
2. Website established to inform public and receive and respond to enquiries.
3. Terms and conditions established.
4. All associated forms and information sources designed and translated.
5. Develop IT software/systems for verifying eligibility, voucher amount and voucher delivery.
6. Statewide bike shop vendor outreach.
7. Register and establish MOUs with certified bike shop vendors.
8. Train Bike Shop vendors in verifying voucher linked to buyer identity.
9. Establish sustainable mechanisms for bike shop vendors to report on voucher use and receive timely payments, within 30 days of rebate being redeemed.

Phase 2

10. Initiate rebate process and receive applications within 100 days of contract signing.
11. Provide vouchers to eligible applicants.
12. Collect data on applications, rebates received, and rebates used.
13. Collaborate with and support UW on data collection.
14. Submit monthly invoices to WSDOT for reimbursement.
15. Provide monthly updates to WSDOT.
16. Provide all requested data for the purposes of reporting to WSDOT, the legislature and the public.