

## Scope of Work Checklist

The Scope of Work is the official description of the work that is to be completed during the contract. **The Scope of Work must be consistent with the Project Timeline. Applications with missing components will be at a competitive disadvantage.** Please use this checklist to make sure your Scope of Work is complete.

The Scope of Work must:

- Use the Fiscal Year 2018-19 template provided and in Microsoft Word format
- List all tasks and sub-tasks using the same title as stated in the project timeline
- Include task and sub-task numbers in accurate and proper sequencing; consistent with the project timeline
- List the responsible party for each task and subtask and ensure that it is consistent with the project timeline (i.e. applicant, sub-applicant, or consultant)
- Include a thorough Introduction to describe the project and project area demographics, including a description of the disadvantaged community involved with the project, if applicable
- Include a thorough and accurate narrative description of each task and sub-task
- Include a task for a kick-off meeting with Caltrans at the start of the grant
- Include a task for procurement of consultants, if consultants are needed
- Include a task for invoicing
- Include a task for quarterly reporting to Caltrans
- Include detailed public participation and services to diverse communities
- Include project implementation/next steps
- List the project deliverable for each task in a table following each task and ensure that it is consistent with the project timeline
- EXCLUDE environmental, complex design, engineering work, and other ineligible activities

## **SCOPE OF WORK: Coordinated Public Transit Human Services Transportation Plan Updates for Calaveras, Amador, and Tuolumne Counties**

**INTRODUCTION:** The scope of work outlined below reflects anticipated tasks and deliverables to complete the updates for the 2019 Coordinated Public Transit-Human Services Transportation Plans for Calaveras, Amador, and Tuolumne Counties; hereafter referred to as the “coordinated plans”. The final deliverables will be an inventory of available transportation services, assessment of transportation needs for transportation disadvantaged populations, list of prioritized strategies, activities and/or projects to address the identified needs and gaps, and an implementation plan. The coordinated plans will directly lead to project eligibility for Federal Transit Administration grant funding.

**RESPONSIBLE PARTIES:** The Amador County Transportation Commission will administer this grant with the Calaveras Council of Governments (CCOG) and Tuolumne County Transportation Council (TCTC) participating as sub-applicants. All three agencies will jointly seek a private consulting firm to conduct all three agencies plans concurrently and contribute staff time. The consultant will be selected through a competitive bid process and will assist with completing the following scope of work. Minor changes to the scope may be necessary to integrate innovative approaches or recommendations by the consulting firm.

**OVERALL PROJECT OBJECTIVES:** The overall project objective is to identify prioritized strategies eligible for funding that will improve the mobility of persons with disabilities, elderly individuals, or low-income individuals. These strategies could include: consolidation of transportation information (e.g., mobility management center), expansion and/or consolidation of existing volunteer programs, introduction of new or expanded specialized transportation service, or public education and training programs. The project will ultimately achieve enhanced transportation accessibility, minimize duplication of services, and facilitate the most appropriate cost-effective transportation possible with available resources.

### **1. Project Kick off Meeting**

#### **Task 1.1 Kick off Meeting**

- ACTC will hold a kick off meeting with Caltrans, CCOG, and TCTC to review grant procedures, project expectations including invoicing, quarterly reporting, and all other relevant project information and objectives.
- **Responsible Party:** ACTC/CCOG/TCTC

<b>Task</b>	<b>Deliverable</b>
<i>1.1</i>	<i>Kick Off Meeting Notes</i>

### **2. Task Title: Consultant Procurement**

#### **Task 2.1 RFP/RFQ**

- Complete RFQ/RFP process for selection of a consultant using the proper procurement policies and procedures.
- **Responsible Party:** ACTC

#### **Task 2.2 Consultant interviews**

- Interview the consultants once proposals have been received.

- **Responsible Party:** ACTC/CCOG/TCTC

**Task 2.3 Consultant selection**

- ACTC/CCOG/TCTC will meet and decide with consultant best fits with the needs and wants for the Coordinated Plan.

- **Responsible Party:** ACTC/CCOG/TCTC

**Task 2.4 Develop and execute Consultant Contract**

- Develop executed consultant contract with chosen consultant.
- **Responsible Party:** ACTC

<b>Task</b>	<b>Deliverable</b>
2.1	<i>Copy of Procurement Policy/Procedures &amp; RFP/RFQ</i>
2.2	<i>Consultant Interviews</i>
2.3	<i>Review scoring and select consultant</i>
2.4	<i>Executed Consultant Contract</i>

**3. Staff Coordination**

**Task 3.1 Project Team Meetings**

- Monthly face to face project team meetings with consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to project team meetings.
- **Responsible Party:** ACTC/CCOG/TCTC

<b>Task</b>	<b>Deliverable</b>
3.1	<i>Meeting Notes/Minutes</i>

**4. Kick off Meeting with SSTAC and List of Stakeholders**

**Task 4.1 SSTAC Kick-off Meetings**

- Convene a kick-off meeting with each County’s Social Services Transportation Advisory Council (SSTAC) to introduce SSTAC members to the project and obtain their feedback on project activities and outreach.
- **Responsible Party:** Consultant

**Task 4.2 Develop Stakeholder List**

- Stakeholder involvement is an important element to this project and required by statute. Develop a list of project stakeholders specific for each County including social and human service agencies, public transit providers, and other community organizations and members of the public that represent the target populations. Other stakeholders could include private and other transportation providers. Use the most recent coordinated plans as a starting point for developing this list. Consult with each SSTAC to further refine the list during the project kick-off meeting.
- **Responsible Party:** Consultant

<b>Task</b>	<b>Deliverable</b>
4.1	<i>Meeting Notes</i>

## 5. Existing Conditions Analysis

### Task 5.1 Review Existing Planning Documents

- Review existing and relevant planning documents specific to each County including previous Coordinated Public Transit-Human Services Transportation Plans Short Range Transit Plans, Transit Development Plans, previous Unmet Transit Needs Findings Reports and other documents deemed relevant to the development of the study.
- **Responsible Party:** Consultant

### Task 5.2 Develop inventory of available services

- Review the inventory from the most recent coordinated plans and update through Stakeholder input and other reliable sources. Services in the inventory will include publicly operated fixed-route and demand response services, transportation services provided or sponsored by social and human service agencies and other community organizations, as well as private transportation services. The inventory will be comprehensive and serve as the building block for identifying coordination strategies and transportation gaps.
- **Responsible Party:** Consultant

### Task 5.3 Geographic Service Area

- Document geographic service area and schedules of all transportation services; as well as capacity and/or number of vehicles for each service. Examine current coordination efforts and document.
- **Responsible Party:** Consultant

Task	Deliverable
5.1	<i>Summary of Relevant Research and Planning Documents</i>
5.2	<i>Existing Services Report</i>
5.3	<i>Geographic Services Report</i>

## 6. Analysis of Transportation Disadvantaged Populations and Demographic Profile

### Task 6.1 Demographic Profile

- Develop a demographic profile of each County using data from sources such as the US Census Bureau, California Department of Finance, and local data from each jurisdiction. The demographic profile will focus on the three target populations: persons with disabilities, older adults, and low-income individuals. Incorporate other economic and social characteristics such as income, employment, and vehicle access to develop a clear picture of transportation needs throughout each county.
- **Responsible Party:** Consultant

Task	Deliverable
6.1	<i>Demographic Profile Report</i>

## 7. Public Outreach

### Task 7.1 Project Initiation Workshops

- Schedule, coordinate, publicize and facilitate public meetings to present background information about the project and solicit oral and written input about the needs and service gaps of the target populations. At least three meetings should be scheduled, one in each County, at locations where accessible transportation services can be made available. The public and identified Stakeholders will be invited (including SSTAC members) via public notices and other avenues. If deemed necessary, Spanish translators will be present at the workshops.
- **Responsible Party:** Consultant

### Task 7.2 Interviews, Focus Groups, and Surveys

- Develop a survey to distribute to stakeholder agencies who either provide transportation and/or serve clients needing transportation. The survey will solicit detailed information regarding the type and capacity of transportation services provided, interest and/or need in coordination, and level of clientele needing assistance with transportation.
- Schedule and coordinate focus group meetings and in-person or telephone interviews for each County with identified project Stakeholders and/or representatives from social and human service agencies and community organizations. The purpose of these meetings and interviews is to identify populations served by these agencies, services provide including transportation, client mobility needs and challenges, and any transportation services currently provided.
- **Responsible Party:** Consultant

### Task 7.3 Draft Plan Review Public Workshops

- Schedule, coordinate, publicize and facilitate at least three public workshops, one in each County, to present a summary of the draft plan and receive comments and recommendations about the identified strategies and implementation plan. The workshops should be located where accessible transportation services can be made available. The public, project Stakeholders, and SSTAC members will be invited via public notices and other avenues. If deemed necessary, Spanish translators will be present at the workshops.
- **Responsible Party:** Consultant

<b>Task</b>	<b>Deliverable</b>
7.1	<i>PowerPoint Presentation, Workshop Summaries, and Photos</i>
7.2	<i>Interview and Meeting Notes</i>
7.3	<i>PowerPoint Presentation, Workshop Summaries, and Photos</i>

## 8. Identify Strategies and Implementation Plan

### Task 8.1: Key Findings and Assessment of Transportation Needs

- Quantify current and projected transportation needs in the service area and identify gaps in existing services. Review inefficiencies and duplication in the current transportation system. Compare origins and destinations of transportation providers and the potential for integration. These findings will be derived through completion of Tasks 2 and 3 and will serve as the basis for the development of strategies and implementation priorities.
- **Responsible Party:** Consultant

### Task 8.2: Identify Strategies

- Identify strategies, activities and/or projects to address the identified gaps in service, identification of coordination actions to eliminate or reduce duplication in services, and strategies for more efficient utilization of resources into each plan. Examine coordination opportunities, integrated services, and/or alternative service delivery options or models.
- Develop methodology for prioritizing implementation strategies. The strategies identified will be prioritized based on evaluation criteria such as resources, time, and feasibility for implementing specific strategies and/or activities identified.
- **Responsible Party:** Consultant

### Task 8.3: Implementation Plan

- Develop a detailed implementation plan of the preferred strategies categorized as high, medium, and low priority. Identify responsible agency for implementation, estimated costs and timeframe for implementation, potential funding sources, and other information necessary for program implementation.
- **Responsible Party:** Consultant

Task	Deliverable
8.1	<i>Needs Assessment Report</i>
8.2	<i>Strategies and Evaluation Report</i>
8.3	<i>Implementation Plan</i>

## 9. Final Documentation

### Task 9.1: Prepare Draft Report

- Compile all deliverables to develop a draft of the Coordinated Public Transit-Human Services Transportation Plans for Amador, Calaveras, and Tuolumne Counties. Draft plans will be reviewed by the project team, stakeholders and SSTAC members from each County.
- **Responsible Party:** Consultant

### Task 9.2: Prepare Final Report

- Incorporate feedback/comments and revise draft plans into three administrative drafts. The administrative drafts will be reviewed by the project team and the plans will then be revised and finalized to go before the ACTC, CCOG, and TCTC for adoption.
- **Responsible Party:** Consultant

### Task 9.3: Present Final Plans to Councils

- Present the final coordinated plans for each county to the respective transportation boards at a regularly scheduled meeting.
- **Responsible Party:** Consultant

Task	Deliverable
9.1	<i>Draft Plan</i>
9.2	<i>Administrative Draft and Final Plan</i>

**10. Project Management & Administration****Task 10.1: Fiscal Administration**

- Submit complete invoice packages to Caltrans District 10 staff based on milestone completion – at least quarterly, but no more frequently than monthly.
- **Responsible Party:** ACTC

**Task 10.2: Quarterly Reports**

- Submit quarterly reports to Caltrans District 10 staff providing a summary of project progress and grant/local match expenditures.
- **Responsible Party:** ACTC

<b>Task</b>	<b>Deliverable</b>
<i>10.1</i>	<i>Invoice Packages</i>
<i>10.2</i>	<i>Quarterly Reports</i>