

## Project Scope of Work

### Task 1 Project Team Meetings

- Monthly face to face project team meetings with consultant(s) 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

Task	Deliverable
1.1	<i>Meeting Notes/Minutes</i>

### Task 2 Kick off Meeting with SSTAC and List of Stakeholders

#### Task 2.1 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 2.2 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

Task	Deliverable
2.1	<i>Meeting Notes</i>
2.2	<i>List of Stakeholders</i>

### Task 3 Existing Conditions Analysis

#### Task 3.1 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 3.2 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 3.3 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
3.1	<i>Summary of Relevant Research and Planning Documents</i>
3.2	<i>Existing Services Report</i>
3.3	<i>Geographic Services Report</i>

### Task 4 Analysis of Transportation Disadvantaged Populations and Demographic Profile

#### Task 4.1 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
4.1	<i>Demographic Profile Report</i>

### Task 5 Public Outreach

#### Task 5.1 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 5.2 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 5.3 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>
5.1	<i>PowerPoint Presentation, Workshop Summaries, and Photos</i>
5.2	<i>Interview and Meeting Notes</i>
5.3	<i>PowerPoint Presentation, Workshop Summaries, and Photos</i>

**Task 6 Identify Strategies and Implementation Plan**

**Task 6.1: 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 serve as the basis for the development of strategies and implementation priorities.

- **Responsible Party:** Consultant

**Task 6.2: 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 6.3: 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

<b>Task</b>	<b>Deliverable</b>
6.1	<i>Needs Assessment Report</i>
6.2	<i>Strategies and Evaluation Report</i>
6.3	<i>Implementation Plan</i>

**Task 7 Final Documentation**

**Task 7.1: 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 7.2: 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 7.3: 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/Each Regional Agency

<b>Task</b>	<b>Deliverable</b>
7.1	<i>Draft Plan</i>
7.2	<i>Administrative Draft and Final Plan</i>
7.3	<i>Council PowerPoint Presentations</i>

**Optional Tasks to be bid separately**

The Calaveras Council of Governments (CCOG) and Tuolumne County Transportation Council (TCTC) are interested in contracting with the selected firm to also receive a Short Range Transit Plan (Optional Tasks 8-11, below). The Amador County Transportation Commission (ACTC) desires a new route analysis (Optional Task 13, below). There is heavy overlap between these projects and this is seen as a great opportunity to contract for the additional deliverables.

The participating agencies request that any additional work that needs to be done as part of the existing Coordinated Plan tasks be identified separately, although they will be accomplished in concert with the task in support of the Coordinated Plan.

There is a need to separate the accounting for each of the deliverables (Coordinated Plan vs SRTP) for grant administration purposes.

Please provide a separate cost proposal to prepare the Short Range Transit Plans (for CCOG and TCTC).

Please provide a separate cost proposal to prepare new route analysis for ACTC.

If accepted, the agencies will contract for these deliverables separately.

In addition to adding small components to existing Coordinated Plan tasks (if necessary), the CCOG and TCTC have identified the following additional tasks in support of the Short Range Transit Plan:

**Task 8 Develop Service Alternatives**

- Evaluate Under-utilized routes or route sections; major origin-destinations not currently being served (or under-served); candidate areas for new service
- Develop inter-connectivity strategies with other regional transit providers (out of County service analysis), including between Calaveras and Tuolumne; Calaveras/Tuolumne and Oakdale, Manteca or Modesto

- a. (for TCTC this should also include coordination with and outreach to Yosemite Area Regional Transportation System (YARTS) and Veterans Affairs transportation program, which has daily service to Sonora)
- Identify alternative service or funding strategies to increase overall system ridership (e.g., increased weekday or weekend service frequencies, fare fee system, etc.);
- Identify technologies that will help improve overall system performance, customer service, reduce operational costs
- Ensure that service alternatives are consistent with findings and strategies developed in the Coordinated Plan
- Implementation Plan (if necessary)

*Deliverable: Draft Service Alternatives*

### **Task 9 Onboard Customer Survey**

Conduct a passenger survey consisting of a sample from each of Calaveras and Tuolumne fixed routes, conduct select cross tabulated analysis of the data collected, and prepare a report to summarize the findings and conclusions. The purpose of the survey is to assist the Agencies in assessing how the transit system is used in the different areas in which the Systems operate, at different times of the day and days of the week, and by different socioeconomic groups of riders.

*Deliverable: On Board Survey, Report summarizing findings and conclusions*

### **Task 10 Develop Capital and Financial Plans**

The Consultant shall develop a ten-year Capital Improvement Program to include a five-year Financial Plan. The Capital Improvement Program will address the operating and capital needs for vehicles, customer facilities and amenities Information Technology Service (ITS) infrastructure changes, and capital equipment needs. The Financial Plan shall address a five-year period and shall discuss the need for possible service alternatives including a vehicle replacement schedule for fixed route and demand response revenue vehicles, customer facilities and amenities (bus stop/bus shelters, and transit hubs), fare collection system upgrades, system security enhancements, and back office systems for a period of five years.

The Capital Improvement Program should be reconciled with the Financial Plan so that expected capital expenditures do not exceed anticipated revenues, and do not preclude expected operation and maintenance needs. The Capital Improvement Plan should also consider future funding needed to help offset, leverage, or support the costs associated with transit supportive infrastructure.

The Consultant shall develop a five-year financial plan that considers operating and capital costs as well as revenue. Information regarding Agencies past revenues and expenditures, formula grants, and other federal and local sources of funding will be provided to the Consultant. The

financial plan will provide an estimate of anticipated revenue from the farebox, local contributions, and federal sources and identify potential needed increases and/or expected shortfalls from these funding sources.

*Deliverables: Capital and Financial Plans*

**Task 11          Draft/Final Short Range Transit Plan**

Compile all deliverables to develop a draft SRTP for Calaveras and Tuolumne Counties. Draft plans will be reviewed by the project team, stakeholders and SSTAC members from each County. One set of consolidated comments will be presented to consultant for revisions.

Electronic copies of the report shall be provided in an editable format (Word) and in PDF format suitable for posting on the CCOG and TCTC websites. All exhibits, drawings, spreadsheets, shape-files, or other data files specifically developed for the analysis shall be provided in original document file format.

*Deliverables: Draft plan; administrative draft and final plans; PowerPoint Presentations.*

**Task 12          Address Zero-Emission Bus (ZEB) Rollout Plan fleet requirements for Calaveras Transit and Tuolumne County Transit pertinent to Capital expenditures, Financial Plan, facilities and investments beginning in 2023**

This section should address at minimum:

1. Identify the planned schedule for purchase or lease of zero-emission and conventional buses.
2. Identify needed funding and potential funding sources.

*Deliverable: ZEB targets for purchases and requirements identified in the Capital and Financial sections of the SRTP*

**Task 13          ACTC Route Analysis**

Evaluate service alternatives for the City of Lone and the Buena Vista Casino property. Service should include Amador Transit Facility-Lone-Buena Vista Casino-(potentially) Valley Springs

*Deliverable: Route Analysis for Amador Transit*