

# Lewis Clark Valley Metropolitan Planning Organization (LCVMPO)



## SCOPE OF WORK FOR TRANSIT MASTER PLAN UPDATE

Revision	Date	Prepared by	Reviewed by	Approved by	Comments
0	04/11/15	V. Owens	S. Grow	MPO TAC	Issued for bid

## Table of Contents

- 1 Project Initiation, Project Management and Internal Review
- 2 Jurisdiction and Public Outreach and Engagement
- 3 Plan and Policy Review
- 4 Vision/Goals/Objectives/Policies/Marketing Strategy
- 5 Analyze Existing Conditions
- 6 Conduct Modal and Corridor Analysis
- 7 Review and Validate Transit Regionalization Study
- 8 Develop 2040 Transit System Plan

## **Task 1: Project Initiation, Project Management, and Internal Review**

Immediately upon approval of the Contract by the Lewis Clark Valley Metropolitan Planning Organization (LCVMPO) Policy Board the Consultant shall meet with the LCVMPO Transit Master Plan Update Steering Committee (“The Steering Committee”) to:

- Consultant shall be aware that it is the preference of the LCVMPO to keep the Transit Plan short and to the point containing only the essential information. Additional information shall be included as appendices; however a detailed review of the appendices shall not be required to fundamentally understand the content of the Plan
- Ensure cover sheet formatting requirements are clear for interim work papers and other transmitted documentation:
  - Cover sheet required on all documentation
  - Cover sheet shall include the LCVMPO logo (“Follow the Rivers”), and may include Consultant and Sub-Consultant logo(s) at the discretion of the Consultant
  - Document title
  - Revision block including revision number, revision date, prepared by, reviewed by, approved by and comments/purpose
  - Consultant may propose a revision numbering system or use a system specified by the LCVMPO
- Ensure electronically transmitted documents shall use a file naming convention that incorporates the document title, date, and revision number
- Ensure the Consultant has a clear understanding of the various elements that makeup Transit in the LC Valley including connections to surrounding communities:
  - Lewiston Transit System – City of Lewiston, ID
  - Asotin County Public Transportation Benefit Area (PTBA) including Vanpool– Asotin County, WA
  - Appaloosa Express Transit – Lapwai, ID
  - Regional Public Transportation, Inc. (RPT) doing business as SMART Transit – Moscow, ID
  - COAST, Colfax, WA
  - Medicaid Providers (Idaho County Rideshare, Emzee Transportation)
  - Volunteer Organizations (Interlink)
- Develop objectives of the Plan (i.e. what shall the end product look like?)
- Identify available data and published materials
- Establish communication channels

- Establish a plan for coordinating with local governments and agencies (i.e. communication channels)
- Agree on a process for periodic work development submittal for interim review and approval
- Agree on specific Task by Task work deliverables
- Agree on a final plan outline
- Determine the format for the project web page and how it will be served and managed (refer to Task No. 2)
- Discuss/identify project stakeholders
- Identify determining criteria and comparison cities for Task 3
- Finalize the Public Participation Plan including the Public Comment period at the end of the project
- Develop a Steering Committee and other required meeting schedule(s) envisioned to be no less than one every 4-6 weeks over the entire duration of the project. Meetings shall be scheduled to coincide with other activities such as public outreach events, etc. when possible to conserve costs.

Working with the Lewis Clark Valley Metropolitan Planning Organization (LCVMPO) Project Manager, the Consultant shall regularly report the status of the project budget, work effort progress, and project schedule in accordance with a mutually agreed to calendar. Reports shall be straightforward, easy to read and understand, logically organized and structured to provide the relevant and important information, and include early identification of challenging issues and their effective resolution. The intent is that the project control system is “integrated” in that all elements are always consistent. Specific Project Control requirements are as follows:

- Consultant shall use its standard project controls systems (i.e. systems that the Consultant owns or has in place that meet the intent of the following requirements), methods and procedures to perform the Work subject to the requirements set forth in this section. The LCVMPO may offer, recommend or impose additional or alternative systems to be used by Consultant to the extent that Consultant’s existing systems are not adequate to achieve the requirements of this section.
- Requirements set forth herein apply to Consultant and all Sub-Consultants. Consultant shall ensure and enforce compliance of such requirements by all their Sub-Consultants.
- Consultant shall create a clear and obvious ongoing link between the project budget, the project schedule, the work progressing system, the cost reporting system, and the payment system (i.e. invoices).
- Consultant and the LCVMPO Project Manager shall agree on a project controls calendar for the duration of the project.

- The current schedule, project progress documents, and cost report shall be updated monthly all on the same cut-off date.
- Consultant shall use a critical path method (CPM) based scheduling platform (e.g. Microsoft Project or equivalent).
- Consultant shall follow best industry practices in developing and maintaining the required schedules.
- Schedules shall contain sound, thorough logic that consistently reflects the true status of the Work (i.e. schedules that depict the work as it is being executed).
- The baseline schedule (i.e. the schedule that is reflective of the original approved execution plan) shall be consistent with the contract schedule (i.e. the schedule provided with RFP response before baseline is established).
- Baseline schedule shall not be revised without LCVMPO Project Manager approval.
- The project's schedule development process shall take into account a general slow-down in work progress over the holiday period from the week of Thanksgiving through the first week in January.
- Consultant's progress measurement system shall be based on physical percent completion of deliverables. Progress measurement milestones for each deliverable shall be established and agreed with the LCVMPO Project Manager in order to credit partial completion progress for deliverables (e.g. a work product could be broken down into progress elements such as AA% for starting work, BB% for delivery of a draft, CC% for comment resolution and incorporation, DD% for delivery of final work product, and EE% for final Steering Committee approval).
- Once rules of progress credit for deliverables have been established and approved by the LCVMPO Project Manager, they shall remain fixed.
- Progress measurement curve ("S-Curve") shall be linked to the baseline schedule.
- Consultant shall submit the schedule of values for review and approval by the LCVMPO Project Manager.
- Consultant shall establish and maintain a cost tracking system to track, calculate and register all earned costs. Such cost tracking system shall be able to provide accurate reporting of the earned cost of Work performed. These costs will originate from the agreed to schedule of values.
- Consultant's cost report shall include by deliverable:
  - Deliverable Description
  - Scheduled Fee
  - Percent Complete

- Planned Percent of Total Fee
- Total Percent Earned
- Total Fee Earned
- Fee Previously Billed
- Most Recent Billing
- Total Billed to Date
- Total Forecasted Fee
- Consultant's invoices shall mirror the cost report
- Consultant shall institute a change management process that includes steps to ensure the early identification and prompt reporting to the LCVMPPO Project Manager of potential changes.
- Project controls reports shall be a short form format consisting of:
  - Cover sheet containing sections for work completed in the last period, work forecasted for the coming period, problems and concerns, needs, and potential changes.
  - Updated current schedule
  - Updated progress measurement S-curve
  - Updated cost report
- A separate one page project controls report shall be produced containing key information from above to be posted on the LCVMPPO's website. The content of this report shall be mutually agreed upon between the LCVMPPO Project Manager and the Consultant.

The Consultant shall work with the LCVMPPO Project Manager to respond to input from the policy and technical reviewers (i.e., LCVMPPO Steering Committee, LCVMPPO Technical Advisory Committee, and LCVMPPO Policy Board) and the general public assembled to help guide the project to completion. All work products shall be produced to facilitate development of the Transit Master Plan as a web-based document in addition to a hard-copy printed document.

Consultant Responsibilities/Deliverables:

- Ongoing progress reports throughout the life of the project
- Project baseline and current schedule
- Project baseline and current budget
- Monthly invoices
- Project Manager to attend management and review meetings in person unless granted approval for remote attendance in advance by the LCVMPPO Project Manager

- All monthly meeting materials exclusive of agendas.
- Copies of color maps and exhibits, production of presentation materials
- All materials required to effect all public input
- Respond in writing to all comments

LCVMPO Responsibilities:

- Assemble policy/technical teams
- Schedule meetings
- Meeting agendas
- Prepare meeting minutes (i.e. key decisions and action item focused)
- Collect and summarize all written and verbal comments from policy/technical reviewers, and the general public

**Task 2: Jurisdiction and Public Outreach and Engagement**

*Jurisdiction staff and community endorsement of the Transit Master Plan is critical to the long-term success of the Lewis Clark Valley transit systems, and to the ability of governing agencies to implement the Plan. We have found that jurisdiction staff, community leaders and local residents respond best to an outreach process that focuses on personal and consistent communications. We also understand the importance of documenting concerns and recommendations provided by jurisdictions and community members during the planning process.*

Consultant shall work with the LCVMPPO Project Manager to develop a jurisdiction staff engagement plan that employs an open communication process through which detailed information around the inner workings of all transit systems can be freely solicited and provided.

Consultant shall implement a comprehensive “take it to the public” engagement strategy that will result in meaningful input on transit in the LCVMPPO from a range of stakeholders including residents, businesses, major institutions, agencies, policy makers, transit agency employees, and others. Special attention will be required to enlist the participation of “under-represented” communities such as low income and Limited English Proficiency (LEP) individuals. It will be very important for the Consultant to devise a method for gaining input from residents that are not currently transit riders, but might be with changes or information. All methods shall be adequately planned for in the project schedule. The Consultant shall analyze all input received and must present analytical methods and technical findings in ways that can be clearly understood by the Steering Committee and the general public.

Methods to be employed to solicit public input shall include, but are not necessarily limited to:

- Surveys (both hard copy and online) – Consultant shall develop a survey in sufficient detail to gather information from LCVMPPO staff, the project team, decision-makers, stakeholders and the public that will allow a thorough

understanding of transit users and would be users demographics, needs, desires, system shortcomings, etc.

- Listening Stations - These are attended events and locations to encourage and solicit direct public input. The number and location to be determined jointly with the LCVMPO Steering Committee. For initial planning purposes the number should include ten (10) different locations. One of the first will be a four day event at the Nez Perce County (NPC) Fair on September 24-27, 2015. The Consultant shall prepare the booth the day prior to Fair opening (i.e. furnishings, decorations, all set-up, etc. to produce an attractive attention getting display), provide all necessary materials (i.e. maps, surveys, office supplies, etc.), and shall man the booth reserved by the LCVMPO for Transit Plan interaction each day from daily fair opening until closing with no gaps in coverage (**NOTE: This is a NPC Fair requirement**).
- Project Web Page – The LCVMPO will utilize its “Current Projects” page to post periodic information regarding project status (e.g. simplified project controls reports noted earlier.) *The LCVMPO has found that web pages specifically constructed for projects designed to solicit public input and inform the public are of low value. Should the Consultant view this opinion and approach differently they may propose an alternative methodology for discussion and approval by the LCVMPO Project Manager.*
- Online Mapping Tool – If the posting of maps and other information is deemed appropriate or useful the Consultant shall work with the LCVMPO Project Manager to post such materials on the LCVMPO “Current Projects” web page. *The LCVMPO has found that web pages specifically constructed for projects designed to solicit public input and inform the public are of low value. Should the Consultant view this opinion and approach differently they may propose an alternative methodology for discussion and approval by the LCVMPO Project Manager.*
- Community Workshop/Open House - This will occur following development of the Draft Plan near project completion, and will provide an opportunity for final public review and comment. Generally this is a presentation summarizing Plan recommendations, with supporting maps and display boards highlighting infrastructure and programmatic recommendations.
- Public Comment Period - This will occur following development of the Draft Plan near project completion, and will provide an opportunity for final public review and comment. This is a standard thirty (30) day period as defined by the LCVMPO’s Public Participation Policy. The complete draft plan will be posted on the LCVMPO’s website, or can be delivered in hard copy if requested. Comments can be submitted online, by email or by postal mail. The 30 day period must be closely coordinated to end immediately prior to a LCVMPO Technical Advisory Committee (TAC) meeting (typically the fourth Wednesday of each month). Final plan approval can then be recommended by the LCVMPO TAC for action by the LCVMPO Policy Board approximately 2-3 weeks later (typically the second Wednesday of each month).

### Consultant Responsibilities/Deliverables:

- Detailed public outreach strategy and implementation plan
- Outreach and presentation materials including materials such as surveys, maps, and office supplies required to effect meaningful input.
- All “Listening Station” preparation, set-up, furnishings, materials, decorations, banners, office supplies, and human resources to man and attract the public to stations during the agreed to timeframes.
- Leadership in public meetings and other input gathering methods
- Manpower to conduct all outreach activities
- Translation and interpretation services
- Advertising
- Work Paper1 - Work Paper summary of all engagement techniques employed along with written and verbal input in tabular and graphical forms.

### LCVMPO Responsibilities:

- Mailing lists
- Press releases
- Meeting locations and minor meeting logistics
- Work Paper 1 review and comments

## **Task 3: Plan & Policy Review**

The Consultant shall review all available relevant plans, practices, policies, standards and designs in the Lewis Clark Valley as they relate to the transit environment. Consultant and the LCVMPPO staff will identify documents for review, and the LCVMPPO will provide the Consultant with electronic access or a review copy if the document is not available electronically. Examples include but are not limited to:

- Public Transit Master Plan Lewis Clark Valley Metropolitan Planning Organization dated September 2006
- Lewis Clark Valley Metropolitan Planning Organization Transit Regionalization Study dated April 2009
- Lewis Clark Valley Metropolitan Planning Organization Public ADA Facilities Inventory, December 2012
- Valley Destination 2040, The Long Range Transportation Plan for the Lewis Clark Valley Metropolitan Planning Organization dated September 17, 2013
- Human Services Transportation Coordination Plan, November, 2014

Consultant will also collect information on relevant local, regional, State, and Federal transit-related legislation/policies.

Consultant will take the information collected above and compare the plans, policies, goals, and objectives in tabular form against:

- Plans from nationwide sources (cities of similar size and demographics)
- Plans from trendsetting areas identified as similar to the Lewis Clark Valley in terms of demographics, as well as current and planned transit system(s) usage and needs
- Policies, goals, and objectives from State and National organizations

Consultant Responsibilities/Deliverables:

- Detailed review of all documentation described
- Proposal of comparison trendsetting areas for Steering Committee concurrence
- Work Paper 2 - Work Paper comparative summary of documentation visions, objectives, and goals

LCVMPO Responsibilities:

- Access to plans, practices, policies, standards, and designs
- Concurrence on comparison trendsetting areas
- Work Paper 2 review and comments

#### **Task 4: Vision/Goals/Objectives/Policies/Marketing Strategy**

Building on Task 3, the Consultant will work with the Steering Committee to develop the project vision, goals, and objectives.

- A vision statement outlines what the MPO wants Transit to be. It concentrates on the future and is a source of inspiration.
- The goals help guide the LCVMPPO towards fulfilling the vision.
- Objectives are more specific statements under each goal that further define how the vision will be achieved.

The vision, goals, and objectives will be developed out of existing efforts by the LCVMPPO, and will be supplemented by the Plan and Policy Best Practices Comparison completed in Task 3. The vision, goals, and objectives will be validated by the Steering Committee to ensure they correctly reflect the direction of the LCVMPPO, and to ensure they correctly set the stage in terms of the focus and outcome of the Plan.

The Consultant shall develop a transit Marketing Strategy that is designed to create a decision by the consumer to choose the transit service(s). The marketing strategy shall address:

- Everything that the consumer encounters when it comes to the business of transit, including:

- Advertising (e.g. routes, maps, stops, costs, policies and procedures, etc.)
- What they hear (e.g. in reviews, the media, from other riders, etc.)
- Customer service (e.g. how this is provided, who to call, how they will respond, etc.)
- Follow-up care

Consultant Responsibilities/Deliverables:

- Analysis of Work Paper 2 content
- Work Paper 3 – Work Paper proposal of vision, goals and objectives specific to this Plan
- Marketing Strategy

LCVMPO Responsibilities:

- Work Paper 3 review and comments
- Final agreement on Plan vision, goals and objectives

**Task 5: Analyze Existing Conditions**

The Consultant will produce a snapshot state of the LCVMPPO transit environment Work Paper. The purpose of the Work Paper will be to describe the current conditions of Lewis Clark Valley’s complete transit systems (including surrounding region systems), identifying both positive elements as well as areas of concern (gap analysis). One of the most important aspects of this analysis shall be an in depth look at all aspects of safety and security performance. The Work Paper shall identify core policy and performance principles, examine local, regional, state, and national best practices with special emphasis on the user’s perspective.

Areas identified as potentially problematic shall be scheduled for field investigation if warranted. If field investigation is warranted the level of data collected will vary based on need. Field investigations will be documented using field notes, taking field measurements, and using digital photography. This approach will allow further evaluation of the setting; identify system opportunities and constraints, and record site-specific information such as level of use, facility condition, and key gaps or obstacles.

*Any field investigation will not include a block-by-block inventory of existing transit facilities; rather it will supplement existing data provided by MPO staff and will focus on filling key gaps where data may be missing.*

Consultant Responsibilities/Deliverables:

- Work Paper 4 - State of Transit in the LC Valley and surrounding area existing conditions report

LCVMPO Responsibilities:

- Planned transit system(s) projects by LCVMPPO jurisdiction

- Current transit route maps
- Aerial photos
- Demographic and land use data
- Travel demand modeling data (where available)
- Roadway network
- Traffic volumes (where available)
- Levels of service (where available)
- Work Paper 4 review and comments

### **Task 6: Conduct Modal and Corridor Analysis**

The Consultant will develop evaluation criteria (including sufficient market assessment) and related methods and apply these criteria to define high priority service improvements and assign the most appropriate and environmentally sustainable transit mode by corridor and alignment. Included in this work will be the following analyses:

- An assessment of roadway, signal system and other rights-of-way improvements that could be made to improve existing service levels
- Evaluation of bus sizes and types, route additions/deletions and changes, alternative fuel evaluation methodology, appurtenances such as disabled support systems, bicycle carriers, support infrastructure, etc.
- Evaluation of higher capacity and/or more sustainable transit modes such as reduced headways, bi-directional routes, etc.
- Identification of potential fiscal, operational and policy constraints associated with particular modal assignments

Where appropriate, a phased approach to final modal choice(s) will be indicated. Also anticipated as part of this analysis is a definition and establishment of up to three levels of hierarchy within the existing network of high ridership corridors based on both transportation and land use characteristics.

#### Consultant Responsibilities/Deliverables:

- Work Paper 5 Modal and Corridor Analysis report that includes:
  - Mode definition and application technical report
  - Literature review of previous corridor studies to determine the range of ridership potential and capacity requirements for corridors
  - Evaluation criteria and methodology
  - Modal and corridor assignment maps and descriptions for each of the high ridership corridors
  - Corridor and alignment options maps/graphics

- Evaluation of bus sizes and types, route additions/deletions and changes, alternative fuel evaluation methodology, appurtenances such as disabled support systems, bicycle carriers, transit support infrastructure, etc.

LCVMPO Responsibilities:

- Work Paper 5 review and comments

## **Task 7: Review and Validate Transit Regionalization Study**

Much of the existing information contained in the Lewis Clark Valley Metropolitan Planning Organization Transit Regionalization Study dated April 2009 remains valid and useful. The LCVMPPO desires a review of the content of this study using the following approach:

- Consultant shall thoroughly review the study content, basis, and recommendations
- Areas where the content, basis, or recommendations appear to have changed significantly resulting in invalidation shall be annotated in a standalone Work Paper using a referencing scheme to be developed by the Consultant.
- Recommendations for obvious corrections or areas where further analysis is deemed beneficial shall also be annotated in the above Work Paper.

**The LCVMPPO desires an early completion of this effort. Refer to the RFP proposed schedule for specific timing around this element of the Work.**

Consultant Responsibilities/Deliverables:

- Work Paper 6 Existing Transit Regionalization Study Review containing the results of the review and recommendations for update
- Inclusion of Work Paper 6 as an Appendix to the completed Transit Master Plan update.

LCVMPO Responsibilities:

- Work Paper 6 review and comments

## **Task 8: Develop 2040 Transit Master Plan**

The Consultant will explicitly define and describe the elements of a 2040 integrated transit system plan drawing on all prior Work Papers focusing upon the transit network and system infrastructure and service expansion. The system plan will incorporate the analysis from all previous Tasks and include technologies, vehicle characteristics, new lines of service, capital projects, and operational and roadway design/engineering improvements.

This Task will identify ways to improve the current transit system to be more efficient, effective, and customer friendly. The Consultant will identify ways to address the challenges of changing travel patterns, increasing costs, and operational and physical constraints that affect on-time performance. The breadth of this task will include the following activities:

- Update transit routes and service levels as needed to match current and future travel patterns
- Develop a comprehensive project list (programs and improvements) with planning-level cost opinions. The cost opinions shall include estimated planning, design, engineering, and construction costs, in terms of a plus/minus range of accuracy (to be agreed upon) for the estimates. For example, American Society for Testing and Materials (ASTM) Standard E2620 defines Order of Magnitude as being accurate to within plus 50% or minus 30%. Consultant will use the latest unit costs available from the LCVMPPO and the jurisdictions, together with the most recent figures from comparable communities in Idaho and Washington.
- Develop project sheets for routes that provide clear direction on where to allocate resources first. To better assist the local jurisdictions in securing grants or other funding, Consultant will develop project description sheets for the identified projects (format to be agreed upon based on examples provided by the LCVMPPO Project Manager). Project description sheets shall serve as a tool for future implementation funding applications. Project sheets will describe key characteristics of each proposed including:
  - Need/purpose
  - Relevant background data
  - Short description of improvement
  - Small project area map
  - Photo or cross-section (as needed)
  - Planning-level cost-estimate
  - Priority
  - Other notes
- Identify specific actions to improve non-motorized access to stops and stations, including transit nodes and transfer points, and improve streetscape and urban design
- For a variety of funding scenarios (to be agreed upon) Consultant shall identify potential funding sources for both capital projects and ongoing operations and maintenance of the proposed transit network. Costs of the phased improvements will be compared with funding needs, so that long term programming for local matching funds can be accomplished. Funding sources to be explored include:
  - Program revenues
  - Grant revenues
  - Loan programs
  - Development impact fees

- Park impact fees
- Special tax districts
- Government exactions (e.g. facilities in lieu of funding)
- Public/private partnerships including colleges and universities
- Donations/other funding sources
- Develop a clear implementation strategy for policy and programmatic actions to support the growth and sustainability of transit service in the Lewis Clark Valley and surrounding area. The implementation strategy shall be based on the ranking outcome combined with:
  - Funding availability and requirements
  - Other programmed transportation improvements
  - Eliminating an immediate safety hazard or other system difficulty
  - Ensuring that the system grows rationally rather than as a series of disconnected pieces over time
- Propose a final Transit Plan outline for Steering Committee approval prior to compiling the final plan
- Support final review of the complete Transit Plan by the Steering Committee, the LCVMPO TAC, and the general public

Consultant Responsibilities/Deliverables:

- Proposed final Transit Plan outline including appendix arrangement
- Complete Draft Transit Plan including the elements described above (electronic copy)
- Support final review of the complete Transit Plan
- Complete Final Transit Plan including all of the elements described above and incorporating non-contradictory comments received from the Steering Committee, LCVMPO TAC, and from the general public in the following format:
  - One (1) electronic copy
  - Two (2) bound hard copies

LCVMPO Responsibilities:

- Review and approve Transit Plan draft outline
- Provide example project sheet format
- Review and provide non-contradictory comments to the Draft Transit Plan
- Review and approve Final Transit Plan