



Agenda Item No.	Board Meeting Date	Open/Closed Session	Information/Action Item	Issue Date
23	12/11/17	Open	Action	12/06/17

Subject: Award a Contract Between Sacramento Regional Transit District and Jarrett Walker + Associates for a Route Optimization Study, and Conditionally Delegating Authority to the General Manager/CEO to Award Option Work

responsive proposals on August 24, 2017 from the following firms: Jarrett Walker + Associates (JWA); Steer Davies Gleave; and, Transportation Management & Design, Inc. (TMD).

The qualifying criteria included the Proposer’s understanding of the contract scope, staffing and experience, work plan and price. The Evaluation Committee consisted of: Laura Ham, VP, Planning & Accountability; Alva Carrasco, Deputy Chief Operating Officer; James Boyle, Director, Planning; Wendy Williams, Director, Marketing, Communications, & Public Information; James Drake, Principal Planner; and, Bruce Griesenbeck, Data Modeling Manager, Sacramento Area Council of Governments (SACOG).

The evaluation of written proposals resulted in two firms being invited to oral presentations, JWA and TMD. After oral presentations, the selection committee determined that both JWA and TMD remained in the competitive range and began contract negotiations with each firm.

After contract negotiations concluded, JWA’s proposal was deemed as the most advantageous offer to complete the Route Optimization Study for SacRT. While both firms are highly qualified to perform the work, JWA was selected for the following reasons:

- Mr. Jarrett Walker, a consulting expert in public transit, leads a strong experienced transit team with comprehensive knowledge in the transit industry, including network and service design, GIS analysis, mapmaking, policy guidance and stakeholder involvement.
- Contract Manager, Michelle Poyourow, is a captivating and engaging speaker, specializing in managing large network redesigns. She has managed several JWA projects, including work in Indianapolis (Indiana), Richmond (Virginia), Flagstaff (Arizona), Missoula (Montana), Boulder (Colorado), and Anchorage (Alaska).
- JWA specializes in helping communities understand their transit options through meaningful engagement, as well as the benefits and trade-offs of transit policy decisions.
- JWA demonstrates sensitivity regarding including non-English speakers and non-literate individuals in the outreach process and willingness to coordinate with the local community on a successful outreach plan.
- The JWA team includes skilled technical planning staff who demonstrate excellent communication styles and a customer-oriented approach, with an ability to distill diverse perspectives.
- The JWA outreach subconsultant, AIM Consulting, is a local communication specialist responsible for public involvement that has a great deal of experience in Sacramento, and established relationships with many advocacy groups and stakeholders.
- JWA has led network design, stakeholder outreach, and policy development for many transit plans, including projects in Houston, San Jose, Fresno, Columbus, Indianapolis, Raleigh, and Richmond, Virginia.
- An overall synergetic team that has a proven track record of success.

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## Background

The ROS will be a comprehensive, objective examination of SacRT’s routes, schedules, reliability, and other service characteristics. Project goals include understanding changes in local and regional travel demand patterns, increasing ridership, improving farebox recovery, identifying opportunities and challenges offered by new mobility options, identifying service planning principles to guide SacRT services over time, building strong relationships with customers and stakeholders, providing opportunity for disadvantaged populations, and adhering to a high standard of transparency in decision-making.

## Project Plan

The project plan includes extensive coordination related to public involvement and community engagement, including but not limited to, public and stakeholder workshops, pop-up workshops on the system, and various presentations to the Board of Directors and other stakeholders. The selected consultant will conduct a comprehensive data analysis of existing conditions and trends, develop an alternatives/choices report, conduct additional public engagement on those results, prepare a blank slate route optimization and network design, conduct additional public engagement on the draft network, and present a final plan. It is important to note that this plan represents many hours of staff time and an extensive effort that cannot be fully conducted by in-house SacRT staff in addition to their regular duties. However, SacRT staff will lead the consultant’s efforts and expects that the consultant will draw on knowledge of staff, policy makers, stakeholders and customers with specific awareness of the SacRT system.

## Budget

Although the Board delegated authority for the General Manager/CEO to award and execute a contract for an amount not to exceed \$140,121, during the solicitation period, SacRT received feedback from the Proposing Consultants that the budget for the study was markedly underfunded based on the scope. Staff had indicated that the initial budget would need to be augmented as the project moved forward, and asked potential proposers to submit bids based on the scope as drafted. A more realistic budget for completion of Phase I and Phase II work is in the range of \$400,000. An opportunity arose to partner with The Sacramento Area Council of Governments (SACOG) to apply for a Sustainable Communities Grant to encourage local and regional planning that furthers state goals, including, but not limited to, the goals and best practices cited in the regional transportation plan guidelines adopted by the California Transportation Commission, in the amount of \$260,000. The grant was approved on Dec 3, 2017.

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Option Work - Origin and Destination (O&D) Study, Paratransit Plan, and Fleet Management Plan

An O&D study is required by the Federal Transit Administration (FTA) to be performed once every five years. The last O&D study was completed in 2013 and it is due in 2018. Both JWA and TMD were asked to provide a price quote for an O&D study. Two competitive quotes are required for contracts of value between \$5,000 and \$100,000 under SacRT’s Procurement Ordinance and Standard Operating Procedures. It is not only practical but also prudent to use the same firm for the O&D study as the ROS. Although the funding to perform the O&D study has not been identified at this time, staff requests that the Board provide authorization to the General Manager/CEO to award and execute the Option Work after the funding for it has been secured.

Additional option work includes the draft and final Short Range Transit Plan (SRTP) assistance, an update of the SacRT American with Disabilities Act (ADA) Paratransit Plan, and an update of the SacRT Fleet Management plan, all of which were included in the scope of work in the original request for proposals, but are not funded at this time. Staff will continue to actively pursue additional grant opportunities for this optional work and, if approved, the principal Agreement will be amended as funding becomes available to authorize these additional tasks.

Budget Amendment

In order to accommodate the option work detailed above, the FY 2018 Capital Budget will need to be increased by \$205,000.

Recommended Action

Staff recommends the Board award a Contract to Jarrett Walker + Associates for a for Route Optimization Study; increasing the amount not to exceed by \$259,879, from \$140,121 to \$400,000, (of which \$260,000 is funded by a Caltrans Sustainable Communities Grant) and authorizing and directing the General Manager/CEO to execute said Contract. Staff also recommends that the Board conditionally delegates authority to the General Manager/CEO to award option work to Jarrett Walker + Associates, as funding becomes available for the following tasks: Origin and Destination Study, Draft and Final Short Range Transit Plan (SRTP) Assistance, Updated Paratransit Plan, and Updated Fleet Management Plan; the total consideration for all optional projects may not exceed \$205,000 in the aggregate and the General Manager/CEO may authorize the Consultant to perform the Option Work by individual project, through multiple amendments to the Contract, or all tasks may be authorized in one amendment to the Contract. Staff also recommends amending the FY 2018 capital budget by \$205,000 for the ROS project.

RESOLUTION NO. 17-12-\_\_\_\_\_

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

December 11, 2017

**AWARDING A CONTRACT BETWEEN SACRAMENTO REGIONAL TRANSIT DISTRICT AND JARRETT WALKER + ASSOCIATES FOR A ROUTE OPTIMIZATION STUDY**

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the prior budget for the Route Optimization Study Project was underfunded and the budgeted amount is hereby increased by \$259,879, from \$140,121 to \$400,000, (of which \$260,000 is funded by a CalTrans Sustainable Communities Grant) and,

THAT, the Contract between Sacramento Regional Transit District, therein referred to as "SacRT," and Jarrett Walker + Associates, therein referred to as "Consultant," wherein Consultant agrees to provide a Route Optimization Study, as specified for an amount not to exceed \$400,000 is hereby approved.

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ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: \_\_\_\_\_  
Cindy Brooks, Assistant Secretary

RESOLUTION NO. 17-12-\_\_\_\_\_

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

December 11, 2017

**CONDITIONALLY DELEGATING AUTHORITY TO THE GENERAL MANAGER/CEO  
TO AWARD OPTION WORK TO JARRETT WALKER + ASSOCIATES, AS FUNDING  
BECOMES AVAILABLE**

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE  
SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the Board hereby delegates authority to the General Manager/CEO to award Option Work to Jarrett Walker + Associates, as funding becomes available for the following Tasks: Origin and Destination Study, Draft and Final Short Range Transit Plan (SRTP) assistance, updated Paratransit Plan, and Updated Fleet Management Plan. The total consideration for all projects may not exceed \$205,000 in the aggregate and the General Manager/CEO may authorize the CONSULTANT to perform the Option Work by individual project through multiple Amendments to the Contract or all Tasks may be authorized in one Amendment to the Contract.

THAT, the General Manager/CEO is hereby authorized and directed to execute all Contract amendments necessary to effectuate authorizing the Option Work.

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ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: \_\_\_\_\_  
Cindy Brooks, Assistant Secretary

RESOLUTION NO. 17-12-\_\_\_\_\_

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

December 11, 2017

**APPROVING THE FIFTH AMENDMENT TO THE FISCAL YEAR 2018 CAPITAL  
BUDGET**

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE  
SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, the Fifth Amendment to the Fiscal Year 2018 Capital Budget to increase the  
Capital Budget in the amount of \$205,000 for the Route Optimization Study project is  
hereby approved.

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ANDREW J. MORIN, Chair

A T T E S T:

HENRY LI, Secretary

By: \_\_\_\_\_  
Cindy Brooks, Assistant Secretary