

REGIONAL TRANSIT ISSUE PAPER

Agenda Item No.	Board Meeting Date	Open/Closed Session	Information/Action Item	Issue Date
11	07/26/10	Open	Action	07/21/10

Subject: Authorizing Release of a Request for Proposals for a Comprehensive Operational Analysis

ISSUE

Whether or not to Authorize Release of a Request for Proposals for a Comprehensive Operational Analysis (COA) to Reorganize and Expand the Sacramento Regional Transit Route Network.

RECOMMENDED ACTION

Adopt Resolution No. 10-07-____, Authorizing Release of a Request for Proposals for a Comprehensive Operational Analysis to Reorganize and Expand the Sacramento Regional Transit Route Network.

FISCAL IMPACT

This action does not involve the expenditure of funds. The contract award, which will involve the expenditure of funds, will be presented to the Board as a future action. The COA will be funded through Planning grants administered by SACOG, specifically for this purpose. One grant has been awarded and RT has applied for a second. No capital funds are being used for this project.

DISCUSSION

On August 24, 2009, the Sacramento Regional Transit District (RT) adopted the TransitAction Plan which provides a long term strategy for future growth of the RT transit network. The TransitAction Plan supports strategies introduced by the Sacramento Area Council of Governments (SACOG) in its Blueprint smart growth planning process. While the TransitAction Plan recommends a detailed strategy for major capital improvements and supportive measures to insure the success of the recommended improvements, the in-depth work necessary to reorganize the bus system to support TransitAction Plan goals still needs to be completed.

Since the adoption of the TransitAction Plan, RT efforts toward implementing the TAP have been stymied by economic recession and the related downturn in transit revenues. RT has been forced to remove 20 percent of its route network, as well as reduce the level/frequency of service on several bus routes and rail.

On June 28, 2010 RT staff presented its Board with a Financial Recovery Plan that includes a strategy for regrowth of the transit system service levels. To insure that the transit levels are restored and expanded in a manner that best reflects the goals of both the Blueprint and the TransitAction Plan, RT staff now proposes to conduct a Comprehensive Operational Analysis (COA) to guide the restoration of service in accordance with the Blueprint and TransitAction Plan objectives. The COA will recommend a gradual regrowth of the system in step with increasing revenues. The COA will reflect regional growth projections, land use and environmental impacts.

Approved:

Presented:

FINAL 7/21/10

General Manager/CEO

AGM for Planning and Transit System Development

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Attachment 1 is the scope of work for the COA. The COA will consist of the following activities:

- Develop short-term and long-term improvements to the RT route structure
- Develop route frequency recommendations for individual routes
- Update and recommend route running times
- Recommend bus stop spacing for recommended changes to individual routes
- Recommend the vehicle type and size for each route recommendation (e.g. 30 passenger bus, 25 passenger bus, BRT vehicle, etc.)
- Recommend service type by route, including at minimum: fixed route local and express; route deviation; community bus service or circulator; bus rapid transit and enhanced bus
- Update RT service standards and apply to recommended routes
- Update RT performance criteria to reflect measures needed to insure successful performance of the route network
- Recommend capital improvements to reflect the expanded system
- Recommend staffing numbers and skills needed to manage the expanded system
- Recommend phased implementation scenarios to reflect the increased future cost of the expanded system and projected levels of revenue
- Develop a ridership projection for each scenario

RT began data collection for the project with a study of the use of the transit system by current riders called an Origin/Destination study. This study will be complemented with existing data on travel patterns available through SACOG, the American Community Survey and other sources. A structured community participation plan, which will include Community and Employee Advisory Committees, will be developed by RT in partnership with the selected Consultant. The following table outlines major steps and a time line for the COA.

Date	Milestone
July 2010	Origin-Destination Survey Results Complete
August 2010	RFP is released
September 2010	Consultant Selection
November 2010	First public outreach meetings
March 2011	Short-Range Service Plan to RT Board
August 2011	Long-Term System Expansion Plan to RT Board

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Subject: Authorizing Release of a Request for Proposals for a Comprehensive Operational Analysis

Staff recommends that the Board of Directors approve release of an RFP for a Comprehensive Operational Analysis to Reorganize and Expand the Sacramento Regional Transit Route Network.

SCOPE OF WORK

Comprehensive Operational Analysis

The Sacramento Regional Transit District (RT) seeks a qualified consultant to conduct a Comprehensive Operational Analysis (COA) of its transit route network. RT operates a bus and light rail network within Sacramento County. RT has recently updated its Transit Master Plan, now called the TransitAction Plan. The TransitAction Plan was developed by RT to be an extension of the Sacramento Blueprint prepared by the Sacramento Area Council of Governments (SACOG). The TransitAction Plan provides the framework for Sacramento area investment in transit through the year 2035.

After the adoption of the TAP, RT was forced, due to the economy, to severely reduce its bus route network and service levels on bus and light rail. RT wishes to develop a plan to increase service gradually by reorganizing existing services and introducing new service that meets the travel needs of the Sacramento community. The COA must reflect the goals and objectives of the TAP and the Sacramento Blueprint.

This project is funded through a CalTrans planning grant. Approximately one-half of the funding for this project, \$300,000, has been received and the other portion of the funding is expected by September, **Therefore, the project is divided into two phases: a Phase 1 Short-term Service Plan; and a Phase 2 Long-term System Expansion Plan.** Phase 2 is an option that may be exercised by RT, subject to funding availability.

The Short-term Service Plan should be completed by March 2011 so it can be incorporated into RT's Fiscal Year 2011-2012 Operating Budget. The Long-term System Expansion Plan should be completed by September 2011.

Project Tasks

Consultant will analyze the route network and recommend short- term as well as long-term modifications including:

Changes to route alignment, frequency, service days, hours of operation and line spacing based on productivity and coverage

Adjustments to running times, departure times/locations, transfer times, and stop spacing, to improve schedule adherence and customer satisfaction

Removal of minimally used bus stops

Appropriate vehicle type and service characteristics, including fixed- and flex-route, local, limited, and express service

Updated service standards based on industry norms as well as RT's fixed productivity requirements, as stipulated by the California Transportation

Development Act (Public Utilities Code Section 99200 et seq.) and the County of Sacramento Measure A

Capital needs, including improvements to passenger facilities

Staffing recommendations

Implementation phasing

Project Management

RT's Project Manager for the COA will be RoseMary Covington, Assistant General Manager of Planning and Transit System Development, or her designee. The project will have three advisory committees:

The Working Level -Employee Technical Advisory Committee, the Community Technical Advisory Committee and the Citizens Technical Advisory Committee.

These will provide input on potential routing changes and review and comment on Consultant recommendations during the progress of this project.

Steering Committee - An Executive Advisory Team will provide initial approval of all recommendations before presentation to the RT Board.

Executive Management - The RT Executive Management Team will also provide general oversight to the Project, including review and comment at key milestones and veto, if necessary, on recommendations.

Task 1. Data Collection and Analysis (Phase 1)

RT staff will make available the following information as needed for analysis:

- The results of an on-board survey of RT's bus and light rail routes, conducted in May 2010
- Automatic Passenger Counter (APC) data collected on RT's buses and ride check data on both bus and light rail, which can be analyzed by trip, light rail station, bus stop, and time of day
- Route maps and timetables for all service for the past five years
- On-time performance information by route
- Maximum load point data by route
- RT's current Short-range Transit Plan
- RT's current Fleet Management Plan
- Historic and current Capital Programming and Budget
- Historic and current Operating Budget and Work Plan

- RT's current Financial Forecasting Model
- Results of an employee Service Planning Workshop held in February 2008

SACOG will have available:

- The Regional Travel Demand Model
- The results of a regional origin/destination survey completed in 2005
- The Metropolitan Transportation Improvement Plan
- The Sacramento Blueprint

Consultant will be expected to use data from the U. S. Census American Community Survey to report on general population travel habits and from the RT Transit Action Plan, Short Range Transit Plan and the SACOG Metropolitan Transportation Plan and Blueprint to assure coordination with regional planning goals.

GIS data, land use information, and demographic data will be assembled as needed by Consultant with RT staff support. Consultant may propose to assemble additional data, such as trip generation data, necessary for the successful completion of this study.

RT's operators, mechanics, and supervisors are represented by ATU Local 256, IBEW Local 1245, and AFSCME Local 146, respectively.

The union contracts and work rules will be made available to Consultant for familiarization.

Consultant will be expected to tour the service area as necessary to determine the context of the current network. RT staff will assist as needed.

Deliverable: Catalog of information collected for use in this analysis.

Task 2. Data analysis (Phase 1)

Consultant must prepare a set of conclusions summarizing the needs and opportunities for transit network improvement. This includes an analysis of existing service effectiveness, major gaps in service, service overlaps, and opportunities for improvements.

The conclusions can be presented in graphs and charts, including "desire lines" reflecting Sacramento area current and projected travel patterns.

The analysis should incorporate all applicable analysis and investigation conducted in Task 1.

Deliverable: Needs and Opportunities report.

Task 3. Review of Service Standards (Phase 1)

Consultant must review current RT Service Standards and recommend changes. The new standards should balance coverage with productivity, and should take into consideration RT's fixed farebox recovery requirements established by the Transportation Development Act and Measure A. In practice, the new service standards need to be easily understood and reasonably simple to measure.

Deliverable: Revised Service Standards

Task 4. Short-term Transit Service Plan (Phase 1)

Using data collected, including citizen and employee input, and applying the revised service standards, Consultant must develop a plan for bus and light rail service improvements. This service plan must have a five-year horizon and must include recommended changes to the bus and light rail routes and schedules. It must include estimated impacts on cost, ridership, and fare revenue. Changes recommended for the first year, which will go into effect in September 2012, must also conform with RT's anticipated budget for Fiscal Year 2012. The plan must also be shown to have no major, unavoidable negative impacts on disadvantaged communities, per federal Title VI regulations. The plan should assume no major changes from RT's existing fleet and facilities, except for replacement of retired vehicles.

An organizational analysis must be conducted by Consultant to determine whether the implementation of increases in service should be handled by overtime or contracting out for services as an alternative to hiring additional staff. Work rules/union contracts must be considered. RT staff will be available to assist.

Consultant must also make recommendations on "best practices" for communication of service change information to customers.

Deliverable: A Short-term Transit Service Plan, including results of the outreach described in Task 5.

Task 5. Community Participation (Phase 1)

RT anticipates an aggressive community participation effort, which will include:

- three Community Drop-In sessions,

- eight total meetings of the four advisory committees (two for each committee), and
- two presentations to the RT Board of Directors.

All meetings will be tied to a major deliverable (Tasks 2-4 plus kick-off meetings) and held in close time proximity in order to avoid more than one trip per group of meetings. Phase I will require a maximum five Consultant trips.

Task 5 will be a joint effort between RT and Consultant. RT will:

- Develop mailing lists
- Prepare meeting invitations
- Assist in mapping
- Publicize meetings
- Arrange and set meeting space and
- Provide staff for meetings as necessary

Consultant must:

- Attend quarterly meetings of the various planning teams and oversight committees
- Prepare presentation materials as needed
- Assist RT staff in presentations
- Assist in developing responses to questions
- Provide technical staff at meetings as necessary

Task 6 - Final Report (Phase 1)

A Final Report must be developed under Phase 1 that documents the following:

Executive Summary – a stand-alone document appropriate for public distribution and including basic recommendations

Public Outreach

Data Collection

Data Analysis

Short-term Transit Service Plan

 Phasing Plan

 Financial Scenarios

 Staffing Recommendations

Capital Recommendations

Consultant must provide 22 printed copies of all deliverables including the Final Report and a separate Executive Summary. Additionally, all information must be provided electronically in Microsoft Word, Access, Excel, or PDF (Portable Document Format), which can be copied to the RT website. 100 copies of the Final Report must be provided in CD-ROM format.

Phase 2

If RT exercises its option for Phase 2 tasks, only one Final Report will be required, which must include the Long-term System Expansion Plan in addition to the Short-term Transit Service Plan.

Task 7. Community Participation (Phase 2)

Consultant will repeat Task 5, but include the recommendations for the Long-term System Expansion Plan as the subject for the additional public meetings and Board briefings. As in Task 5, three drop-in public meetings, eight Advisory Committee Meetings, and two presentations to the RT Board of Directors must be provided.

Task 8. Long-term System Expansion (Phase 2)

RT's TransitAction Plan has a budget horizon of 2035. RT's Long-term System Expansion Plan should specify new routes, as well as improvements to existing routes, so as to accomplish the level-of-service goals stated in the TransitAction Plan. The Long-term System Expansion Plan should reflect conclusions of the Needs and Opportunities report, citizen input and recommendations from the Advisory Committees.

Working with SACOG, Consultant must develop an estimate of ridership, land use and economic benefits of the recommendations.

The Long-term System Expansion Plan must include a complete analysis of each new route proposed as part of the newly designed route network, including alternative routings, if appropriate. The analysis must include stop placement, running times, ridership estimates, number of trips, revenue hours and miles, vehicle requirement, driver requirement, and cost, including breakdowns of cost per passenger, cost per hour, cost per mile, and farebox recovery.

The Long-term System Expansion Plan should contain a capital needs plan, staffing scenarios, and an implementation plan reflecting various funding scenarios. Specifically, the RT "Financial Recovery Plan," as well as at least two more aggressive scenarios and one more conservative scenario, should be considered.

The staffing scenarios should consider the following:

ATTACHMENT 1

- The number and classifications of employees, such as:
 - ◆ Operators
 - ◆ Supervisors
 - ◆ Maintenance
 - ◆ Support Staff (HR/Admin, etc.)
- The lead times involved on-board to include hiring and training.
- Scheduling in accordance to work standards union contracts (such as meal/rest breaks, vacations, etc.)

The assumptions of the financial model will be closely coordinated with RT's Executive Management Team.

Deliverable: Long-term System Expansion Plan

In preparing its price proposal, Consultant must separately price each of the tasks, including the option tasks. However, because only one Final Report will be required if RT exercises its option, Consultant must provide two prices for Task 6: (1) A price for the base work – a report for just the Short-term Transit Plan; and (2) A price for the base + option work – a report for both the Short-term Transit Plan and the Long-term System Expansion Plan. Consistent with federal rules, RT will consider the prices for the options in conducting its evaluation.

RESOLUTION NO. 10-07-_____

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

July 26, 2010

**AUTHORIZING RELEASE OF A REQUEST FOR PROPOSALS FOR A
COMPREHENSIVE OPERATIONAL ANALYSIS TO REORGANIZE AND EXPAND
THE SACRAMENTO REGIONAL TRANSIT ROUTE NETWORK**

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

THAT, the Request for Proposals for a Comprehensive Operational Analysis of the
Sacramento Regional Transit Network is hereby approved and authorized for release.

THAT, the Request for Proposals be advertised pursuant to the provisions of the RT
Procurement Ordinance.

STEVE MILLER, Chair

A T T E S T:

MICHAEL R. WILEY, Secretary

By: _____
Cindy Brooks, Assistant Secretary