



**VENTURA COUNTY TRANSPORTATION
COMMISSION**

**2025 – 2034 SHORT RANGE TRANSIT
PLAN (SRTP) UPDATE**

REQUEST FOR PROPOSALS (RFP)

I. PROCUREMENT SCHEDULE

Project Name	Short Range Transit Plan Update
Issuance Date	June 19, 2023
Project Period	VCTC anticipates plan completion and approval by December 2024
Pre-Proposal Conference (Optional)	June 28, 2023 @ 1:30 PM (PST) via Microsoft Teams Meeting
Questions Deadline	July 7, 2023 @ 3:00 PM (PST)
Responses to Questions	June 14, 2023
Proposal Submittal Due Date/Time	July 28, 2023 @ 5:00 PM (PST)
Interviews	August 2, 2023, via Microsoft Teams Meeting
Proposal Submittal Location	Via email to asmith@goventura.org
Contract Award*	September 8, 2023
Solicitation Contact	Aubrey Smith asmith@goventura.org
Contract Type	Firm, fixed fee compensated per task completion as identified in Scope of Work

All items contained in the procurement schedule above are subject to change. It is the Proposer's responsibility to check VCTC's website at <https://www.goventura.org/work-with-vctc/contracts/> for updates.

II. MINIMUM REQUIREMENTS

Proposer shall have completed at least three (3) short range transit plans or similar projects (e.g., Comprehensive Operations Analysis (COA), Transit Master Plan, or corridor planning) within the last seven (7) years.

The proposer shall also provide a minimum of three (3) references from the last seven (7) years for completed short range transit plans or similar projects. Please ensure contact information for each reference is up to date.

III. PROPOSAL SUBMITTAL INSTRUCTIONS

VCTC has developed a detailed scope of work for a consultant to assist VCTC in developing a Short Range Transit Plan (SRTP) that will cover FY2025 – FY2034.

The SRTP will serve as a guiding document for VCTC and other transit operators within Ventura County and will help VCTC understand the status and outlook of transit service in the region, both by operator and regionally. The SRTP will also help VCTC understand the impacts of varying levels of transit service funding and provide actionable strategies to support funding advocacy, including the ability to articulate service benefits and tradeoffs at different funding levels due to the impacts of the COVID-19 pandemic. The SRTP will feature focused analyses pertaining to customer markets, service needs, fare structures, capital infrastructure investments, marketing efforts, cost/revenue projections, service plans, and stakeholder engagement.

The scope of work includes the following tasks:

1. Project Management
2. Existing Conditions
3. Stakeholder Engagement
4. Service Evaluation
5. Service Plan Development
6. Capital Plan
7. Financial Plan
8. Community Engagement and Partnerships Plan
9. Fare Evaluation
10. Countywide Paratransit Integration Analysis (Optional Task)
11. Short Range Transit Plan

Please submit technical proposal and cost proposal separately to asmith@goventura.org. Appendices **may not** be included as part of the technical or cost proposal. Proposals received after 5:00 PM (PST) on Friday, July 28, 2023, will be deemed non-responsive and will not be considered.

Any questions concerning this RFP should be directed to Aubrey Smith, VCTC Program Manager – Regional Transit Planning at (805) 642-1591 ext. 110 or email: asmith@goventura.org no later than 3:00 PM PST

on Friday, July 7, 2023. All questions and responses will be posted on VCTC's website (<https://www.goventura.org/work-with-vctc/contracts/>) as an addendum to the RFP.

There is no expressed or implied obligation for VCTC to reimburse responding firms for any expenses incurred in the preparation or delivery of proposals in response to this request. VCTC reserves the right to retain all proposals submitted and use any idea in a proposal regardless of whether that proposal is selected. All submissions are considered a matter of public record. All proposals must include the items listed below. VCTC reserves the right to deem any proposal(s) that do not adhere to any of the instructions contained in the RFP and/or addendums as non-responsive.

A. Proposal Information and Content

Proposals should be organized as follows and shall adhere to the following page limits for the proposal submittal:

1. **Cover Page** (1 Page Maximum) – Indicate RFP subject, name of proposer's firm, local address, telephone number, name of contact person, and date of proposal as well as the names and contact information of any subcontractors. Provide the names and titles of individuals authorized to make representations for the proposer.
2. **Table of Contents** (1 Page Maximum) – Include a clear identification of the material in the RFP by section and page number.
3. **Letter of Transmittal** (1 Page Maximum) – Briefly state the proposer's understanding of the work to be performed and illustrate commitment to perform the work within the specified study duration.
4. **Profile of the Proposer** (1 Page Maximum) – State whether the firm is local, national, or international, and provide a summary of representative experience relevant to the work outlined in the RFP.
5. **Statement of Qualifications** (4 Pages Maximum) – Provide a brief statement of similar/relevant projects performed. Identify individuals who performed work on similar projects and individuals that will be assigned to this project. Provide a list of references for whom similar work has been performed, as well as references for any proposed subconsultants.
6. **Study Approach** (6 Pages Maximum) – Provide a detailed description of approaches to each task contained in the RFP. This should include potential challenges and methods to minimize or eliminate identified challenges.
7. **Project Team** (10 Pages Maximum) – Provide an organization chart with role descriptions and include key team member resumes.
8. **Innovative Approaches** (2 Pages Maximum) – Provide proposed innovative approaches to any tasks outlined in the RFP.
9. **Fee Structure** (See *Cost Proposal Template – Attachment B*) – Proposer shall submit a cost proposal by only utilizing the Excel template provided, refer to Attachment B. Note, in each section there are additional lines for any additional proposed costs. If necessary, proposers are allowed to add a single page explanation of costs to supplement their cost proposal and/or to clarify any costs.

In addition, the cost proposal shall be provided in two formats: 1) an Excel version with fields unlocked for ease of analysis and 2) a signed PDF version. These two cost proposal formats shall be submitted as separate documents, separate from the technical proposal. There are no formulas provided/contained in the Excel template and the proposer is responsible for any errors related to formulas or other inputs submitted to VCTC.

10. **Certification of Federal Compliance** (See Attachment C – Forms, Certifications and Federal Requirements) – Include all necessary federal regulatory compliance certifications in the technical proposal. These forms do not count towards the page limit of the technical proposal.

B. Proposal Evaluation Criteria

Proposals will be reviewed by an evaluation committee established by VCTC. Interviews will be arranged with some or all proposers via Microsoft Teams on Wednesday, August 2, 2023. The time and date of interviews are subject to change. The following guidance is provided to help produce quality and concise proposals:

The study approach should effectively communicate the proposer’s understanding of the project and their management approach. In addition to describing or explaining the project, this section should include an identification of requirements and constraints to consider and address. It should demonstrate that the consultant has the knowledge required and the capability needed to perform the tasks described in the scope.

The list of relevant projects would benefit from descriptions of those projects and the relevant work that the proposing firm or its team members performed as a part of that project – especially for projects that VCTC staff may not be familiar with.

The project team organization chart descriptions should convey the expected roles, responsibility, and availability of the project manager and key staff. It should be clear who is doing what work. It should be clear that the project manager and team members have the necessary experience and qualifications to perform the work, including any certificates or licenses that may be appropriate.

IV. VCTC’S PROTEST PROCEDURES

A. General

1. This policy specifies procedures for Interested Parties (as hereinafter defined) protesting the following staff actions:
 - a) A written notice, by, or on behalf of, the Executive Director denying a bidder’s or proposer’s request for a change in contract requirement; and
 - b) A written recommendation to Ventura County Transportation Commission (“VCTC”) or a decision made by, or on behalf of, the Executive Director to disqualify a proposer, bidder or subcontractor; and
 - c) A written recommendation by, or on behalf of, the Executive Director that VCTC award a contract to a particular bidder or proposer.
2. This policy does not govern any VCTC staff decision not listed in this Section II.A.

3. When a protest has been properly filed, pursuant to the procedures hereinafter set forth, prior to contract award, the VCTC shall not award the contract prior to deciding the protest. When a protest has been properly filed before the opening of bids, bids shall not be opened prior to the VCTC decision on the protest. When a protest has been filed properly after the contract is awarded, the contract shall not be executed until the protest is resolved by the VCTC.
4. Materials submitted as a part of the protest resolution process will be available to the public except to the extent that:
 - a) The information is designated proprietary by the person submitting the information to VCTC. If the person submitting material to VCTC considers that the material contains proprietary material which should be withheld, a statement advising of this fact shall be affixed to the front page of the material submitted and the alleged proprietary information must be specifically identified in the body of the materials wherever it appears.

B. Filing a Protest

1. Protests may be filed only by "Interested Parties". "Interested Parties" are defined as (a) bidders who have responded, and prospective bidders who may respond, to a request for bids, (b) prospective professional services contractors who may respond, and professional service contractors who have responded, to a request for proposals on a VCTC contract and/or a generally funded contract, and (c) subcontractors or suppliers at any tier who have a substantial economic interest in an award, a provision of the specifications, or a bid or proposal submitted to VCTC by a prime contractor, or in the interpretation of the provisions of such documents.
2. Protests to a contract requirement must be filed at least ten (10) working days prior to bid opening or the deadline for receiving proposals. Protests to VCTC staff actions must be filed within five (5) working days of receipt by the bidder or proposer from the Executive Director, or a person authorized to act on behalf of the Executive Director, or written notice of the VCTC staff action.
3. Protests shall be addressed to Ventura County Transportation Commission, 751 E. Daily Drive, Suite 420, Camarillo CA 93010, or such other address as may appear on the request for proposal for bid solicitation.
4. Protests shall be in writing and contain a statement of the ground(s) for protest. At least ten (10) copies of the protest shall be submitted by the protestor in the time and manner specified in this section.
5. The Executive Director, or an authorized person acting on behalf of the Executive Director, shall provide notice, by telephone, telephone facsimile (FAX) or by letter, to all bidders and/or persons who have submitted proposals on the contract which is subject to the protest known to VCTC. Such notice shall state that a protest has been filed with VCTC and identify the name of the protestor. The notice shall be given not more than five (5) working days after receipt of a properly filed protest. The notice shall state that bidders will receive further information relative to the protest only by submitting a written request for further information to the Executive Director.

C. VCTC Preliminary Response to a Protest: Meeting with Staff to Attempt Early Resolution of the Protest

1. Not more than ten (10) working days after receipt of a properly filed protest, the Executive Director, or a person authorized to act on his or her behalf, shall prepare and distribute to the protestor and to all persons specified in Section B.5, above:
 - a) A written preliminary response to the protest. This response shall include a brief explanation of the reasons why the protested VCTC staff action is justified; and
 - b) The time, date and place of the meeting described in Section C.2, below.
2. The Executive Director and/or appropriate VCTC staff shall meet with the protestor to discuss and attempt to resolve the protest within thirty (30) days of the response required by C.1(a) above.
3. After the meeting required by Section C.2, above the protestor shall within five (5) working days give the Executive Director written notice that either the protest is withdrawn or, alternately, that the protestor requests further consideration of the protest. In the event that the protestor fails to file the notice required by this Section C.3 at the office of the Executive Director within five (5) working days after the meeting, the protest shall be deemed withdrawn.

D. Further Investigation

1. If a protest is not withdrawn pursuant to Section C.3, above, the Executive Director shall, within thirty (30) days of receipt of the notice from the protestor described in Section C.3, above, further investigate the protest with the assistance of the VCTC staff.
2. The Executive Director may contract for third-party consulting services when necessary to investigate a protest. The Executive Director may negotiate with the protestor and other interested parties the sharing of the cost of such consulting services.
3. As part of the investigation, the Executive Director shall establish a reasonable time within which VCTC, the protestor, and other interested parties shall exchange all documents and arguments relevant to the protest; provided, however, that such time shall not exceed thirty (30) days without the concurrence of the protestor and the Executive Director.

E. Intended Decision: Comments by Protestor and Other Parties

1. Following investigation, the Executive Director shall, within thirty (30) days, prepare and distribute to the protestor and all persons specified in Section B.5:
 - a) An intended decision recommending actions which the Executive Director believes the VCTC should take to resolve the protest and specifying the reasons for the recommended action of the VCTC.
 - b) A statement of the date within which the protestor and other persons must submit written comments with respect to the intended decision. Such date shall allow a reasonable period for rebuttal and shall vary according to the complexity of the particular protest;
 - c) Given written notice to all Interested Parties of the time, date and place of the VCTC meeting at which the protest will be considered.

2. The following materials shall be included in the agenda package sent to VCTC members prior to the VCTC meeting and shall be available to any person at the VCTC office at least five (5) working days before the hearing:
 - a) The intended decision described in Section E.1(a), above.
 - b) All written comments received within the submittal period described in Section E.1(b), above.
 - c) If the Executive Director has revised his/her intended decision since its distribution pursuant to Section E.2(a), above, a written description of the new intended decision and the reasons for revision.

F. VCTC Consideration

1. At the hearing, VCTC staff and any person may present evidence relating to the protest. At the beginning of the hearing, the Chair of the VCTC may announce time limits on testimony and other procedural rules which, in the opinion of the Chair, are reasonable necessary to preclude repetitious or irrelevant testimony and afford all persons wishing to testify the opportunity to be heard.
2. In rendering its decision on the protest:
 - a) VCTC may adopted or amend the intended decision and findings of fact prepared by the Executive Director and Staff; or
 - b) Make findings and adopt a decision different from the findings and intended decision of the Executive Director; or
 - c) Elect to defer its decision and direct VCTC staff
 - d) To Further investigate the protest; or
 - e) Hire an impartial hearing officer to conduct a hearing and prepare a written recommended decision, including findings of fact, to be returned to VCTC for decision which shall be made pursuant to the procedures outlined in this Section.

V. FEDERAL REQUIREMENTS AND CERTIFICATIONS

This study is funded with Federal Transit Administration funds and must comply with FTA requirements. The following federal requirements and certifications found in Attachment C are considered a part of this RFP and will become a part of the contract for consultant services. The certifications must be signed and included in the consultant's submittal for the proposal to be deemed "responsive."

VCTC SHORT RANGE TRANSIT PLAN 2025 - 2034

SCOPE OF WORK

Background

Transit in Ventura County serves a wide variety of local and regional needs, ranging from the municipal operators that offer local circulator routes and a higher degree of demand-response services, to the more urban Gold Cast Transit District (GCTD) service area with a dense and relatively frequent local route network connecting several cities, and finally VCTC which both oversees regional planning and transportation funding and operates the regional service. Transit services are locally administered (except for GCTD and VCTC).

Proposers are not required to read the following documents, but they provide context for what will be prioritized and/or evaluated within the SRTP. These documents are available on VCTC's website under Plans & Projects and Work with VCTC > Publications:

- VCTC Goals and Strategic Plan
- Transit Integration and Efficiency Study (TIES)
- Coordinated Public Transit-Human Services Transportation Plan (Coordinated Plan)
- Zero Emission Bus (ZEB) Plans (All Operators)
- 101 Communities Connected Study Report
- VCTC Intercity Five-Year Service Plan
- Ventura County SRTP (2015)
- Transportation Emergency Preparedness Plan (TEPP)
- VCTC Comprehensive Transportation Plan (CTP)

1. Project Management

1.1. Meetings

The Consultant shall report the status of the work effort, progress, and schedule on a bi-weekly basis. Any modification to the frequency of project meetings shall be approved by both VCTC and the Consultant. The Consultant shall use systems that are compatible with already established VCTC systems, policies, software, procedures, and practices. Reports shall provide the necessary information to assure VCTC that the work is being accomplished as required and to facilitate invoice review and approval. The Consultant's project management system shall feature safeguards for the early identification of issues and their effective resolution.

1.2. Project Reporting

The Consultant's Project Manager is responsible for monitoring project performance and, if necessary, adjusting project resources to accomplish activities in a manner consistent with the adopted scope, budget, and schedule. The Consultant's Project Manager shall notify VCTC Project Manager or designee of any modification requests to the project scope, budget, and/or schedule and will adhere to the project requirements that are mutually agreed upon between VCTC and the Consultant. The base project schedule shall be submitted prior to the project kick-off meeting and will be reviewed and finalized within seven (7) business days of the kick-off meeting. The Consultant shall also report all corrective measures to the VCTC Project Manager for review and approval. The draft final report is anticipated

to be completed within eighteen (18) months from the date of the issuance of the Notice to Proceed. An additional two (2) months will be allotted for completion of final drafts, reviews, formatting, and administrative tasks.

The Consultant shall provide a minimum of fourteen (14) calendar days to VCTC staff to thoroughly review each deliverable. More complex deliverables may require up to three (3) to four (4) additional weeks for VCTC review. A deliverable is not accepted until formal written notice is provided by VCTC's Project Manager or designee. This process shall ensure that quality is achieved through checking, reviewing, and the managing of work activities for both VCTC and the Consultant. The status of the work efforts shall be reflected in monthly progress reports documenting the Consultant's effort during the billing period, tasks to be accomplished over the next 30 days as well as any forthcoming challenges and issues and potential methods for resolution.

Prior to acceptance and finalization, **ALL** deliverables shall be submitted to VCTC at 90% completion for review. Work deliverables should be proofread before submission to VCTC and include minimal to no grammatical or spelling errors. Deliverables submitted with excessive errors may be rejected until errors have been fixed.

DELIVERABLES:

1. Project schedule – Updated on bi-weekly basis
2. Meeting agendas
3. Meeting minutes

2. Existing Conditions

The purpose of this task is to establish the existing conditions for transit services in VCTC's service area. It will be critical to review existing plans and documents relating to transit; review demographic and economic conditions (pre- and post-pandemic conditions); and conduct a detailed evaluation of the current operations and management of VCTC. The Consultant shall utilize VCTC's FY2023-24 through FY2027-28 Strategic Plan as a key framework policy document for the development of the SRTP. Other relevant studies include the TIES, Coordinated Plan, ZEB Strategy and Rollout Plan, TEPP, and CTP.

2.1. Overview of Transit Services

The Overview subtask shall document the governance and organizational structure as well as the transit services (fixed-route, paratransit, dial-a-ride, microtransit, and regional/intercity rail) provided and areas served by VCTC and the transit agencies that operate within Ventura County:

- Camarillo Area Transit
- Gold Coast Transit District
- Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency
- Southern California Regional Rail Authority (SCRRA – Metrolink)
- Moorpark City Transit
- Ojai Trolley
- Simi Valley Transit
- Thousand Oaks Transit
- VCTC Intercity
- Valley Express

- Kanan Shuttle

Other components shall include the existing fare structure (e.g., payment methods, electronic media, special passes, transfer agreements, fare media usage, etc.) for all operators as well as the revenue fleet and existing facilities (i.e., administrative, vehicle storage, maintenance, fueling, transit centers, bus stops, rail stations, and park-and-ride).

2.2. Market Assessment

The Market Assessment shall detail the existing conditions in Ventura County. The findings from this task will help inform the development of the guiding principles and framework for recommendations while incorporating the key principles from VCTC's Strategic Plan. The purpose of this task is to utilize key demographic data such as population and employment density and distribution, private vehicle travel demand, minority populations, low-income households, vehicle ownership, seniors, youth, persons with disabilities, transit propensity (i.e., transit propensity index) and on-board passenger and community surveys to evaluate the market demand for transit and help identify where transit service can be more successful. VCTC conducted a rider survey in April 2023 for VCTC's Intercity and Valley Express services and will make the results and findings available to the Consultant.

DELIVERABLES:

1. Existing Conditions Report

3. Stakeholder Engagement

Engagement will be key to ensure buy-in and collecting input. The Consultant, in collaboration with VCTC staff, shall develop a universally accessible outreach plan that will establish comprehensive and meaningful strategies for engaging stakeholders and soliciting input regarding their travel habits and experiences related to use transit service in Ventura County.

The main goal is to facilitate continuous outreach with historically disadvantaged and diverse communities within the service area throughout the planning process. This will be achieved by engaging with agencies that currently have contact with members of these communities such as the regional housing authority, senior services, social service agencies, transit riders, disability advocates and historically disadvantaged populations. Outreach will be conducted with these agencies/community representatives for the duration of the SRTP development. Outreach may be conducted through on-board/on-line surveys, meetings, workshops, focus groups, interviews, and outreach directly to key social service agencies and community-based organizations (CBOs). This outreach plan will be adjusted as conditions permit.

The outreach will focus on gathering the data needed to improve transit services for those that need it most. The outreach will help identify public uses, preferences and transportation needs especially as they relate to the current fixed route, paratransit dial-a-ride, and rail services. The outreach will be sufficient to gauge the public's interest and ridership potential for extended evening service hours, weekend service, increased service frequencies, on-demand micro-transit or expanded service areas. Specific questions at key milestones in the project will allow members of the diverse communities to give insightful and meaningful input into the planning process. Maps, graphics, survey results and pictures will be posted in accessible formats online to solicit input.

3.1. Agency Stakeholder Meetings

The Consultant will engage with external stakeholders (i.e., bus and rail agencies that operate services in Ventura County) to provide status updates (i.e., project progress, key deliverables, and general input)

as appropriate. The Consultant can anticipate attending **up to three for each** of the following VCTC committee meetings:

1. Citizens Transportation Advisory Committee/Social Services Transportation Advisory Committee (CTAC/SSTAC)
2. Transit Operators Advisory Committee (TRANSCOM)
3. Transportation Technical Advisory Committee (TTAC)
4. Heritage Valley Technical Advisory Committee (HVTAC)
5. Heritage Valley Policy Advisory Committee (HVPAC)

Given the need to get feedback from potential riders, the Consultant shall identify its approach to solicit feedback from potential VCTC riders. The Consultant will be responsible for developing and distributing in-person surveys except for online outreach which will be distributed through VCTC's existing communication channels. However, the Consultant will develop the accessible survey instrument and also identify the sample size.

3.2. Focus Groups

The Consultant shall convene three (3) focus group meetings that will contain up to five (5) human service organization staff and clients. The specific groups will be invited to participate will be determined with input from VCTC and its' CTAC/SSTAC. It is expected that the list will include targeted populations such as older adults, people with disabilities, veterans, and low-income workers, and individuals who are participating in training or work readiness programs or seeking employment.

Focus groups will be utilized to provide critical input from representatives from clients, human service providers, riders, and non-riders. The Consultant shall identify key input needed from the focus groups and develop an outline with questions for facilitated discussion with the groups. This focus group guide will be flexible enough to allow for organic conversation but will provide sufficient guidance and direction for the facilitators to ensure input from the various focus groups are equitable. The focus group meetings will be guided by the need to gather information on overall service so as to highlight transit gaps, needs and opportunities that each of the population groups experiences. This task will build off of VCTC's Coordinated Plan.

Focus groups will be asked to assist in identifying spatial and temporal gaps in service, as well as limitations based on rider eligibility. Meetings of the focus groups will take place in convenient locations near transit services and will accommodate needs such as American Sign Language (ASL) interpretation or other language translations as needed. The results of the Focus Groups will be utilized in the assessment of needs required in Tasks 4 and 5.

VCTC staff will organize and coordinate the focus group meeting location(s) and invite attendees. The focus groups will take place at transit-accessible, free-to-enter locations identified by VCTC. A detailed discussion guide and note-taking template will be developed to support efficient focus group discussions and usable meeting notes. These resource guides will be provided to VCTC for review two weeks prior to the focus group meetings.

DELIVERABLES:

1. Discussion Guide
2. Summary Analysis for each focus group meeting

3.3. Community Workshops

The Consultant shall be prepared to lead, facilitate, or assist with one in-person community workshop each of the following cities:

1. City of Camarillo
2. City of Fillmore & City of Santa Paula (one combined workshop)
3. City of Moorpark
4. City of Ojai
5. City of Port Hueneme & City of Oxnard (one combined workshop)
6. City of Simi Valley
7. City of Thousand Oaks
8. City of Ventura

VCTC also plans to hold:

- One (1) community workshop for Intercity (location TBD)
- Two (2) general community workshops (location TBD in west and east Ventura County)
- Three (3) virtual public workshops to accommodate work schedules (Weekday Morning, Weekday Evening, and Saturday Morning or Afternoon).

VCTC will facilitate and coordinate with each city to determine the ideal time and day to generate the highest levels of participation.

3.4. Rider Surveys

3.4.1. On-Board Survey

The purpose of this task is to conduct onboard surveys to gather information regarding transit services (fixed route and Dial-A-Ride) for Ojai Trolley, Camarillo Area Transit, Moorpark City Transit, Simi Valley Transit, Thousand Oaks Transit (includes Kanan Shuttle), VCTC Intercity and Valley Express. The Consultant shall also conduct intercept surveys at eight (8) high ridership bus stops and five (5) rail stations with equitable geographic representation for each operator. The on-board surveys will take place on three weekdays (Tuesday, Wednesday, or Thursday) and one Saturday for an accurate sample of all trips for all routes (where service day types are applicable). The on-board survey shall be available in both English, Spanish, Chinese and Braille (will be made available as needed). The Consultant shall create and print the content for the materials needed, facilitate training of survey takers, and manage the data collection, quality checks, and survey analysis.

The survey may include the following categories:

- > **Origin-Destination Information** – Respondents will be asked to identify the precise origin and destination of their current trip by City and/or zip code.
- > **Fare Payment Type** – This information will help provide more detailed information about how passengers pay to ride transit, and under which fare category.
- > **Passenger Satisfaction** – The question will include multi-part questions to assess relative satisfaction with an array of system attributes. Passengers will also have an opportunity to provide open-ended comments or suggestions about routes, hours, accessibility, and frequency of service.
- > **Trip Purpose** – This information will help identify existing markets and help understand fluctuations in ridership.

- > **Preferred Method of Communication** – This question will identify methods such as application push notification, postings on buses or at bus stops, text alerts, website, etc. in order to understand where riders go to receive information and how they want to engage with that information.
- > **Frequency of Use** – Respondents will be asked when and how often they use the service and how long they have been using transit in general.
- > **Transit Dependency** – This information will assess transit dependency by asking if passengers could have made a trip if transit were not available.
- > **Demographic Profile** – This section will ask demographic information including income, age, gender, race, primary language, and other demographics deemed important to the study. This will be optional for respondents to answer.
- > **Vehicle Type (VCTC Intercity Service Only)** – This information will be used to get an understanding of preferred vehicle types for VCTC’s Intercity service.

3.4.2. Online Surveys

The Consultant shall develop a concise and digitally accessible online survey to gather broader community feedback. Similar to the in-person surveys, the Consultant shall develop a survey instrument that captures necessary and relevant information for evaluation of services in Ventura County. VCTC will facilitate the distribution of surveys via email, social media, and its’ website.

DELIVERABLES:

1. On-board survey instrument
2. Survey materials
3. Content for ten (10) public workshops
4. Outreach Summary
5. Onboard Survey Analysis / Key Findings
6. Microsoft Excel (or Access) Database – Survey Responses

4. Service Evaluation

The purpose of this task is to review and update VCTC’s performance metrics and evaluate service on a systemwide, corridor, and route level for bus services. The Consultant shall develop route typologies and route profiles for each route within Ventura County, except GCTD. GCTD will provide route profiles and service assessments to increase accessibility and avoid duplication and inconsistencies.

4.1. Performance Standards

The Consultant shall recommend new or revise existing service standards that reflect the current service and operating environment and represent industry best practices for services like what is operated in Ventura County. The Consultant shall clearly define service characteristics (e.g., rural, urban, commuter, etc.) for each transit service. Service reliability, productivity and on-time performance will also be performance evaluation measures that VCTC will need to establish standards for as well as what triggers a review for service and/or fare changes.

The Consultant shall update VCTC’s Service Design Guidelines for its’ Intercity and Valley Express services and shall incorporate GCTD’s service design guidelines where appropriate.

4.2. Service Assessment

The purpose of this task is to evaluate bus, paratransit, DAR and rail performance, highlighting strengths in the system and opportunities for improvement for all operators (except GCTD). The Consultant shall evaluate the existing route network design and assess its effectiveness in meeting community needs. The task shall evaluate the transit service from the perspective of passengers as it relates to ease of use, cleanliness, safety, comfort, and information availability. The Consultant will utilize feedback from riders through surveys, focus groups, or online platforms to understand their needs, preferences, and concerns.

Analyze ridership patterns, population density, employment centers, and other factors to determine if adjustments to routes, frequencies, or service coverage are warranted. Consider potential opportunities for optimization and expansion. Examine route-by-route ridership, service efficiency and accessibility, cost effectiveness, on-time performance, and service levels and develop recommendations with detailed cost estimates. The assessment will evaluate the accessibility of the transit service for all community members, including those with disabilities, older adults, and individuals with limited mobility. The task will assess whether the service meets the needs of diverse populations and evaluate potential barriers to access and will consider equity considerations and identify strategies to address any disparities.

The Consultant shall identify the specific costs to assess VCTC's Intercity service separately than other operators (see Attachment B – Cost Proposal Template).

DELIVERABLES:

1. Performance Standards Policy
2. Service Design Guidelines
3. Service Assessment Report
4. Route Profiles (with stylized maps produced in Adobe Illustrator or similar program)

5. Service Plan Development

5.1. Plans for Future Transit Services

The purpose of this task is to identify planned service levels for bus, dial-a-ride, paratransit, and rail services during the SRTP planning period of FY2025 – FY2034. Planned service changes for all operators shall be summarized through the end of the SRTP planning period. Post-pandemic service recovery service plans shall be developed for bus, dial-a-ride, and paratransit services using peer agency trends in growing ridership and addressing industry-wide issues such as hiring and retaining bus operators.

5.2. Service Plan Scenarios

A key step in the development of the SRTP is to develop service plan scenarios. The service plans should be based on existing conditions analysis, customer feedback, VCTC goals and objectives, and discussions

with local operators to define potential service adjustments. Service plans shall be developed for the following agencies:

- Camarillo Area Transit
- Moorpark City Transit
- Ojai Trolley
- Simi Valley Transit
- Thousand Oaks Transit (includes Kanan Shuttle)
- VCTC Intercity
- Valley Express

The Consultant shall incorporate LOSSAN and Metrolink's service plans as it relates to service in Ventura County. Each Service Plan will include four (4) scenarios (see below) for each operator (total of 7 service plans) listed above (excluding GCTD) that will include recommendations to improve or modify the existing services as well as for any additional services to improve equity and increased accessibility under specific cost scenarios. For each service plan, the consultant will develop a financial plan to analyze the cost and revenue impacts of each along with a proposed implementation schedule. Each service plan shall contain the following scenarios:

- 1) Cost Reduction Scenario (Reduction in operating costs compared to existing service)
- 2) Cost Neutral Scenario (No change in net operating costs compared to existing service)
- 3) Moderate Cost Increase Scenario (An increase of approximately 0 to 20 percent in the net operating costs beyond the base service level)
- 4) Unconstrained Service Scenario (Increase of budget of greater than 20 percent compared to the base service level)

The analysis of each service level should provide details on service hours, revenue hours, service/revenue miles, makeup of fleet percentage utilization/spare ratio for each service level, expected fares/farebox ratio and overall costs. Along with the service model analysis, the consultant will provide recommendation for cost efficiencies that can be achieved through contracting, alternative fuels/vehicles, or operational changes.

The financial analysis for each plan should compare current revenue projections to projected expenses (adjusted for inflation) to measure sustainability at each of the three specified service levels. The analysis should identify potential funding to help implement the proposed service alternatives.

The need to convert the feet to zero-emission vehicles and construct zero-emission infrastructure should be a key component for each service plan. Each proposed service plan should incorporate the ZEB implementation schedules for each service plan based on each operator's ZEB plan.

The Consultant shall identify the specific costs related to developing service plans for VCTC's Intercity service separately than other operators (see Attachment B – Cost Proposal Template).

DELIVERABLES:

1. Seven (7) Service Plans
2. Financial Analysis for Seven (7) Service Plans

6. Capital Plan

6.1. Capital Plan Development

In consultation with VCTC, the Consultant shall identify and develop a project list that outlines capital needs that should include capital needs of all bus and rail operators in Ventura County based on near- and mid-term service and program needs. The projects should be categorized based on funding constraints and then grouped into funding scenarios (i.e., funded, partially funded, and unfunded with a cross-reference to planned or adopted). This approach is intended to show a comprehensive capital needs list with the need to consider the reality of constrained funding. This process requires close coordination between VCTC and other transit operators within Ventura County to prioritize capital needs, grants, and financing and to constrain these needs based on anticipated funds over the 10-year period.

The Consultant shall refer to VCTC's recently adopted CTP, ZEB Strategy and Rollout Plan, Metrolink's Capital Project List, and other relevant documents to assist in developing a comprehensive project list. VCTC will facilitate the retrieval of relevant documents.

DELIVERABLES:

1. Countywide Capital Project List

7. Financial Plan

7.1. Bus and Rail Operating and Capital Financial Plan

The Consultant shall develop a financial plan that integrates projections of expenses and revenues (both capital and operating) for each bus service (excluding GCTD) and Metrolink rail service (Ventura County Line, Ventura County portion only). The financial plan should also account for potential new funding sources at the local, state, or federal level as well as economic projections of inflation and interest rates. In addition to projecting a baseline rate of inflation (CPI-U) that applies to most financial data, separate inflation projections shall be developed to apply to construction and vehicle capital costs, as well as fuel energy costs. The plan shall also address the capital cost, level of service and resulting operating and maintenance costs, ridership and resulting fare revenue.

VCTC will provide data inputs that are used to develop and/or refine budgets for each operator (excluding GCTD). TDA audits and other applicable financial information can be made available to assist with the development of the financial plan. The plan shall also emphasize the urgent need to identify a funding source for Metrolink operations in the immediate term.

DELIVERABLES:

1. Bus and Rail Operating and Capital Financial Plan

8. Community Engagement and Partnerships Plan

8.1. Stakeholder Mapping

The Consultant shall develop identify and map the relevant stakeholders who should be engaged in community engagement and partnership efforts as it relates to promoting service, fares, reviewing plans, etc. This may include community groups, neighborhood associations, local businesses, advocacy organizations, transit riders, educational institutions, and local government representatives. The Consultant shall define their roles and potential contributions to community engagement and partnership efforts. VCTC is specifically looking to enhance how it engages communities that have populations that are low-income, historically disadvantaged and disproportionately affected, and/or have disabilities. This task shall build off what was contained in and done as part of VCTC's Coordinated Plan.

8.2. Partnership Development

The Consultant shall identify potential partnership opportunities with community organizations, non-profits, businesses, or other relevant entities as well as a strategy to approach and engage potential partners. This task will explore ways to collaborate on transit-related initiatives, such as joint marketing campaigns, sponsorship opportunities, or shared funding initiatives.

8.3. Community Engagement and Partnerships Plan

The plan will provide a framework for VCTC to organize events, workshops, or public meetings to gather feedback, address concerns, and build positive relationships with communities in Ventura County and establish relationships with relevant organizations (i.e., schools, employers, etc.).

The objectives of this plan shall include:

- > Make transit more convenient and easier to use
- > Improve communication with communities and riders
- > Increase participation in future feedback forums
- > Promote existing and planned services to the community
- > Attract new customers
- > Increase support for potential transit referendums

The Consultant shall use the results of stakeholder engagement activities, as well as best practices, in order to develop a community engagement and partnerships plan that identifies key stakeholders identified in the stakeholder mapping task. This will build on recent marketing successes such as the implementation of the VCbuspass, Youth Ride Free Promotional Program, College Ride Program, ¡Buenas con VCTC! Spanish Outreach Campaign, and others. The plan shall identify a range of engagement strategies and activities to involve stakeholders which may include public meetings, workshops, focus groups, online surveys, social media campaigns, community outreach events, or targeted stakeholder interviews. Establish mechanisms for ongoing collaboration and feedback. Create platforms or mechanisms for stakeholders to provide input, share ideas, and express concerns throughout the task. Develop a system for documenting, analyzing, and responding to feedback received.

DELIVERABLES:

1. Community Engagement and Partnerships Plan

9. Fare Evaluation

9.1. Fare and Equity Analysis

The purpose of this task is to holistically evaluate the fare system for each bus operator within Ventura County, with the objective of creating a fare structure that is more equitable, affordable, and simple. The Consultant shall evaluate the current fare structure and develop conceptual options and fare alternatives for each operator within Ventura County (except GCTD). The Consultant will review current funding source requirements related to each agency's fare structure and how potential strategies may be impacted by factors such as Transportation Development Act (TDA) farebox ratio requirements, politics, etc. This task shall identify opportunities to optimize the current fare structures, policies, and technologies while supporting VCTC's Strategic Plan's vision, objectives, and goals.

9.2. Revenue Analysis

The Consultant shall assess the revenue generated from the existing fare structure as well as the farebox recovery ratio, farebox revenue trends with the SRTP timeframe, and the impact of changes on fare revenue. There shall be consideration of alternative revenue sources and potential trade-offs associated with fare adjustments.

9.3. Equity Considerations

The Consultant shall explore equity implications of existing fare policies and technologies and will analyze whether the fare structure disproportionately affects certain communities or demographic groups. This task will evaluate potential strategies to address equity concerns, such as fare subsidies, reduced fares for low-income individuals, or fare capping mechanisms.

9.4. Fare Policy Recommendations

Based on the analysis and evaluation, the Consultant shall provide recommendations for potential fare policy changes or adjustments. Considerations shall be made regarding the trade-offs between fare affordability, revenue generation, ridership goals, and equity objectives.

These recommendations shall include associated benefits, drawbacks, and implementation considerations divided into three time periods:

- > Near-Term Opportunities – Opportunities that may be possible to implement in six (6) months to one (1) year and/or should be implemented to address needs related to COVID recovery.
- > Mid-Term Opportunities – Opportunities that may be possible to implement in the next two years but require additional lead time to implement, including changes to fare technology.
- > Long-Term Opportunities – Opportunities that will require investments in fare technology, personnel (e.g. contractors, staff, etc.), or capital infrastructure or that may take more than three years.

The recommendations shall include the necessary steps, timelines, resources, and communication strategies required for implementing the proposed fare adjustments and strategies to mitigate potential challenges.

DELIVERABLES:

1. Fare and Equity Analysis
2. Fare Implementation Strategies with Cost Estimates

10. Countywide Paratransit Integration Analysis (OPTIONAL TASK)

The purpose of this task is to conduct an analysis of consolidating paratransit services in Ventura County into a countywide paratransit agency. A byproduct of the nine different bus systems across the county has led to unnecessary complexity when it comes to users traveling on paratransit. The primary objectives will be based off the 2022 Coordinated Plan and TIES. If exercised, this optional task shall be completed no later than October 2024.

10.1. Current Conditions and Needs Analysis

The Consultant shall describe the current state of paratransit services in Ventura County, including service providers, service areas, operating hours, fleet size, service quality, and demographics of the population served. This task will include an evaluation of each service provider, considering factors such as reliability, affordability, and accessibility. The Consultant shall identify and assess the current level of coordination between paratransit providers and identify any barriers to integration. This task will highlight any challenges or gaps in the current system that need to be addressed. This task should build upon the work done as part of the 2022 Coordinated Plan.

10.2. Best Practices and Benchmarking

The Consultant shall research and analyze successful paratransit integration models from other counties or regions. The Consultant will identify best practices in areas such as governance structures, service coordination, technology implementation, and funding mechanisms. The primary objective is to benchmark the county's paratransit services against these best practices to identify areas for improvement.

10.3. Stakeholder and Public Engagement

The Consultant, in collaboration with VCTC staff, shall develop a stakeholder engagement plan to involve key stakeholders, including paratransit providers, disability advocacy organizations, local government representatives. The Consultant will be responsible for conducting interviews, up to three (3) focus groups, and up to three (3) workshops to gather input from stakeholders on their needs, concerns, and suggestions for improvement paratransit services. The intent of this task is to encourage collaboration and consensus-building among stakeholders to ensure buy-in for the proposed integration strategies. This task will also include comments and feedback collected through VCTC's Coordinated Plan, Unmet Transit Needs Assessment, and TIES.

10.4. Integration Strategies

Based on the research findings and stakeholder input, the Consultant shall recommend integration strategies that address identified challenges and goals. The recommendations will outline specific actions, timelines, and responsibilities for implementing the integration strategies. Recommendations will be considered as they relate to service coordination, technology enhancements, training programs, policy changes, and funding mechanisms. The Consultant will also include at least three governance elements for overseeing and administering paratransit services within the county.

As part of the recommendations for integration strategies, the Consultant shall identify technologies that could be integrated, implemented, or improved for each Governance Alternative to efficiently operate and monitor the service. The technology components shall cover back-end systems and customer-facing applications related to scheduling, dispatching, rider applications, etc.

10.5. Cost-Benefit Analysis

The Consultant shall conduct a cost-benefit analysis of the proposed integration strategies to assess their financial viability and potential return on investment. The Consultant will also identify potential sources of funding and explore opportunities for cost-sharing between stakeholders and will provide recommendations for prioritizing integration initiatives based on their estimated costs and benefits. These recommendations will form the basis for a policy framework with an accompanying evaluation methodology for prioritizing integration initiatives. The policy framework is intended to provide policy guidance to decision-makers as they distribute capital and operating funds for transit services or potentially consolidate paratransit services in the future.

10.6. Implementation Plan

The Consultant shall develop a detailed implementation plan that outlines the steps, resources, and timelines required to implement the integration strategies. The three phases shall cover the three timeframes that will be determined in consultation with VCTC staff and recommendations from the TIES study. Each year shall be broken out by service and governance elements to highlight the necessary components for implementation.

10.7. Finance Plan

The Consultant shall develop a financial plan that will include a sound and realistic forecast of likely funding for capital, maintenance, and operations expenses. This will involve a review of the current capital and operating budgets, funding needs, and available funding sources.

11. Final Short Range Transit Plan

11.1. Board Review/Approval

The Consultant shall assume up to fourteen (14) presentations (draft and final SRTP) to each operator's governing body. VCTC will assist the Consultant in the preparation of Board agenda items (e.g., staff report and presentation). The presentations shall summarize the key findings and recommendations for dissemination to stakeholders and key decision-makers.

11.2. Short Range Transit Plan Report

The Consultant shall treat each task contained in this scope of work (unless otherwise directed by VCTC's Project Manager) as a chapter in the SRTP. Each chapter shall be provided in a Microsoft Word version and (if applicable) Adobe Illustrator or Adobe InDesign format. Microsoft Excel files that were used to provide tables, charts, etc. or used for support in critical analyses (e.g., Excel spreadsheets for Financial

Plan). The Consultant shall ensure that the report and presentation are accessible and inclusive for individuals with disabilities.

DELIVERABLES:

1. Draft Short Range Transit Plan
2. Final Short Range Transit Plan

ATTACHMENT A – DRAFT CONTRACT

ATTACHMENT B – COST PROPOSAL FORM

ATTACHMENT C – REQUIRED FORMS