Scope of Work (DRAFT)
Mobility Management Program

The Regional Transportation Authority of Pima County (RTA) seeks proposals from qualified professional firms or individuals (CONSULTANT), either singly or through a joint venture, to provide human-services transit planning and operational support leading to the establishment of a Mobility Management program in Pima County. The CONSULTANT shall 1) provide technical assistance to human-services transportation providers in Pima County, 2) conduct site visits to human-service transit agencies, and 3) develop a report and strategic short-term plan outlining critical needs in human-services transportation and recommend achievable strategies for improving inter-agency coordination and enhanced operational performance for agencies in Pima County. Additionally, the CONSULTANT may be asked to provide regional driver trainings and other capacity building workshops or seminars.

This contract will be managed by the RTA and Pima Association of Governments (PAG), with the CONSULTANT working closely with PAG/RTA staff to develop and implement the work plan. Final deliverables, the short-term strategic plan in particular, will be submitted to PAG/RTA for verification of completion and approval or acceptance by PAG Regional Council.

PAG Coordinated Mobility Program

Human-service transportation is, broadly speaking, the network of transportation services provided for people who, due to disability or age, are unable to use or access other forms of transportation, such as private automobiles or public fixed-route transit systems. Human-service transportation includes publicly operated paratransit services, volunteer driver and other transportation programs, and transportation services provided by non-profit social service organizations, either as the agency’s sole mission or as a critical complement to the agency’s activities.

Through the PAG Coordinated Mobility Program, PAG/RTA currently works with over 35 public and private providers of human-services transportation in Pima County, ranging in size from small organizations with fleets of one or two vehicles to large public agencies. Most agencies that participate in the Coordinated Mobility program are current or former sub-recipients of Federal Transit Administration (FTA) Section 5310 grants, known as the Enhanced Mobility of Seniors and Persons with Disabilities program. The Section 5310 program provides capital and operating grants for non-profit and public agencies for the provision of human-services transportation.

Arizona Department of Transportation (ADOT) is the Designated Recipient for the Section 5310 program in the Tucson Urbanized Area and rural Pima County and is therefore responsible for
administering the program and ensuring compliance with federal regulations. PAG, as the Metropolitan Planning Organization (MPO) for Pima County, acts as a planning partner to ADOT by working with provider agencies to create the federally-required, locally-developed Coordinated Public Transit-Human Services Transportation Plan. PAG also convenes the quarterly coordination meetings of human-service transit providers, where PAG staff shares relevant information about and changes to the 5310 program; program sub-recipients discuss opportunities and barriers to coordination; and agencies share information amongst themselves.

**Mobility Management and Coordination of Services**

Since at least 2004, when President George W. Bush issued Executive Order 13330 requiring enhanced coordination of human-service transit agencies, coordination of transit services, and the related concept of Mobility Management, has been a focus of federally-funded human-service transit programs. ADOT and PAG have continued to work with program sub-recipients over the years to encourage coordination and ensure that the structures are in place to allow for expanded coordination of transit services. However, many barriers and challenges persist with establishing better coordination, and PAG/RTA has recognized the need to expand the MPO’s role in Mobility Management activities. To date, PAG has largely restricted its activities to providing technical assistance to program sub-recipients, conducting planning activities and implementation of plan recommendations, and convening the quarterly coordination committee. PAG has not been engaged in Mobility Management activities on a day-to-day basis. The ultimate goal of this contract then, is to establish a framework for how PAG can expand Mobility Management activities in the region to improve service delivery and coordination while also providing interim support and guidance for participant agencies.

**Project Goals**

- Support operational effectiveness of non-profit organizations in human-services transit delivery
- Assist with improving program compliance among participant agencies
- Identify barriers and opportunities in improving service coordination
- Expand technical capacity of program participants
- Improve regional understanding of different human-services transit models
- Create a needs assessment and short-range plan for establishing an effective Mobility Management program in the PAG region

**Proposed Tasks**

The CONSULTANT will be supporting a transition to a Mobility Management framework for the PAG region. To do so, the CONSULTANT will collect information on the current human-service models, provide interim support to human-service transit providers to build regional capacity, and establish
a foundation and strategic plan from which PAG/RTA can immediately begin implementation of the Mobility Management program at the conclusion of this contract.

The CONSULTANT is encouraged to be creative in developing a sound analytical approach which achieves the goals for this project. The CONSULTANT is urged to be as specific as possible when describing the activities and anticipated outcomes for each of the tasks outlined below. The CONSULTANT must provide information on their approach as well as estimated cost breakdowns for each task; however, the CONSULTANT may propose reasonable modifications to tasks and/or additional tasks for possible PAG approval to meet the goals of or improve the value of this project. Tasks 1 and 3 (listed below) are mandatory and must be completed by the CONSULTANT. In addition, the CONSULTANT may complete some or all elements of Task 2; such as standardizing and improving performance reporting, providing driver or organizational trainings, and/or developing templates and methods for sub-recipient transit asset management planning and safety planning. Ideally all work tasks, including optional tasks, will be completed by the CONSULTANT within the firm-fixed price amount. PAG will evaluate all proposals as submitted and reserves the right to modify, add or delete tasks based upon considerations that may include CONSULTANT approach, timeline, cost and budget availability.

Task 1: Site visits with 5310 sub-recipients and other interested agencies

This Task Includes:

- Scheduling and conducting site visits with coordination program participants
- Developing a descriptive inventory of human-service transit delivery systems
- Identifying individual provider needs
- Identifying potential duplication of services

The CONSULTANT will work with PAG/RTA staff and program participants to schedule site visits with at least 15 of the region’s current non-profit human-service transit providers. The CONSULTANT shall develop a checklist or other approach for the type of information to request from the site visits that will best support Tasks 2 and 3 below. At minimum, the CONSULTANT should seek information of how transit services are currently provided by the agency, how trips are scheduled, how ridership is tracked, the agency’s current challenges or concerns in providing transportation services, and be able to offer guidance for improvement.

Deliverables

A report of existing providers, including a description of their current practice, challenges, deficiencies and inefficiencies, and recommended improvements in service delivery and efficiency.

Task 2: Agency capacity building
This Task Includes:

- Developing a regional template for reporting trips and related performance measures
- Supporting program participants with accurate trip reporting
- Supporting program participants with compliance with all relevant ADOT and FTA requirements
- Identifying training needs
- Providing regional trainings
- Developing templates and methods for transit asset management plans and transit safety plans

The CONSULTANT will provide capacity building support for the agencies currently participating in the coordinated mobility program. At minimum, the CONSULTANT shall provide one of the deliverables identified below, and may identify other critical needs based on site visits.

**Deliverables**

Depending on findings from site visits the CONSULTANT will provide technical support and trainings in some or all of the following:

- Develop a regional human-services transit performance monitoring system, including standardizing trip reporting, developing driver logs, improving financial calculations, and creating a means of reporting to the regional Mobility Manager. Performance monitoring should work with existing reporting systems for the sub-recipients and should not create an undue burden. PAG/RTA has already initiated this work.
- Driver and/or organizational trainings. The CONSULTANT should identify deficiencies and schedule and convene regional trainings for drivers, or to train the trainers. The CONSULTANT can coordinate with already certified trainers to ensure that all drivers and agencies in the region are trained in defensive driving, PASS, safety, START, pre and post-trip inspections, CPR, and others.
- By the second quarter of 2015, it is anticipated that the FTA will finalize the new rules for safety plans and transit asset management plans. The CONSULTANT should prepare to assist in developing a plan template and provide technical support to sub-recipients in achieving compliance with the new rules.

**Task 3: Regional Needs Assessment and Short-term implementation plan**

This Task Includes:

- Identifying service duplications
- Identifying opportunities for service coordination
- Identifying unmet needs within agencies
• Identifying barriers for service coordination
• Recommending Mobility Management and coordination strategies, including:
  o Future PAG resource commitments to Mobility Management
  o Service models to meet many mobility needs and specific recommendations for how to implement those models, such as:
    ▪ Regional transit brokerage
    ▪ One-Call/One-Click Center
    ▪ Vehicle rotation strategies between low-mileage and high-mileage agencies
    ▪ Vehicle leasing strategies with regionally-contracted ADA provider
    ▪ Contracting for transit services
    ▪ Etc.

At the end of the contract, the CONSULTANT shall create a regional human-services needs assessment and short-range strategic implementation plan. This document will provide critical guidance to PAG/RTA in establishing a Mobility Management program in Pima County and allow PAG to transition immediately into implementing the recommendations of the plan. The plan shall consider not just non-profit organizations, but also potential partnerships or coordination with current public transit providers and regional human-service transit contractors.

**Deliverables**
The CONSULTANT will create and submit for PAG approval a human-services needs assessment and short-range strategic implementation plan. The plan shall be time constrained and describe specific actions to be taken to establish a Mobility Management program in the PAG region and improve service coordination. At a minimum, the plan shall include:

• PAG program and staffing needs to expand the organization’s role in Mobility Management activities, plan implementation, and in providing technical support to human-service transit providers
• Identification of service duplication with strategies for addressing the duplication
• Strategies for meeting ADOT mileage requirements
• Specific strategies for improving service delivery, service coordination, and compliance, including:
  o Vehicle rotation strategies
  o Vehicle leasing strategies through the regional contractor
  o Trip contracting options
  o Taxi voucher
  o Other recommended efficiency improvements
  o Connections between urban and rural services
• Strategies for establishing the following regional transit resources
  o A regional transit brokerage model
- A One-call/One-click center

**Duration**
The contract is not to extend more than one year beyond issuance of the Notice to Proceed.

**Cost**
Cost for the contract is not to exceed $64,000. Scope is negotiable contingent upon realistic cost estimates provided by the CONSULTANT.