

Task Order NO. 6

Date: 10/3/2023

To: TRANSPO GROUP USA, INC.

You are hereby requested to comply with the following Task Order. This document will become a supplement to the contract and all provisions of the contract will apply hereto.

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| WTA Contract Number: 2021-260 RFP | Task Start: 10/6/2023 |
| Vendor Quote Number: TO6-Microtransit | Estimated Project End: 10/6/2024 |
| Scope of Work: Preparation of a microtransit feasibility study | |

| Item Description | Quantity | Unit Price | GL Account Number | Department Number | Project Code | Total With Tax | Notes |
|---------------------------------|----------|------------|-------------------|-------------------|--------------|----------------|-------|
| Micro Transit Feasibility Study | 1.00 | 111,211.00 | 50303 | 13 | 00 | 111,211.00 | |
| - | - | - | - | - | - | 111,211.00 | - |

Contract Authority: \$600,000.00
Amount Invoiced Through 4/23/2021: \$546,787.00

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| STATEMENT OF NEED AND CERTIFICATION: I certify that this task order is part of the originally contracted scope of work. | |
| <i>Tim Wilder</i> Signed: Tuesday, October 3, 2023 Printed Name: Tim Wilder Department: Planning | |
| First Endorsement: DEPARTMENT DIRECTOR I endorse this task order as necessary for WTA business and is part of the original work scope. <i>N/A</i> Signed: Tuesday, October 3, 2023 | Second Endorsement: FINANCE DIRECTOR I endorse this purchase. The budget has been reviewed and verified. <i>Shonda L Shipman</i> Signed: Wednesday, October 4, 2023 |
| Third Endorsement: ACCOUNTING MANAGER I endorse this task order. The GL assigned is correct for the work being performed. <i>Erin Knudson</i> Signed: Wednesday, October 4, 2023 | Fourth Endorsement: PROCUREMENT I endorse this purchase. Procurement policies and procedures have been followed. All supporting documentation is included in the request. <i>Magan Waltari</i> Signed: Wednesday, October 4, 2023 |

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| Task Order Approval: GENERAL MANAGER | Task Order Approval: CONTRACTOR |
| I approve this task order. <i>Les Reardanz</i> Signed: Wednesday, October 4, 2023 | I agree to the terms of this task order. <i>Stefanie R Herzstein</i> Signed: Wednesday, October 4, 2023 |

On-Call Transportation Planning Services

Task Order 6

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|-------------------------|--|
| Client Name: | Whatcom Transportation Authority (WTA) |
| Task Order Name: | Microtransit Feasibility Study |
| Exhibit Dated: | September 15, 2023 TG: 1.21322.00 |

STUDY GOAL

- Through a feasibility assessment, determine a preferred microtransit operating model in defined areas of Whatcom County.
- Prioritize implementation of microtransit within the County for the defined areas.

WORK TASKS

Task 1: Project Management

Transpo Group and TMD (the consultant team or the consultant) will kick off Task Order 6, Microtransit Feasibility Study (the study), with a virtual Teams meeting with a Whatcom Transportation Authority (WTA) steering committee. The kick-off meeting will cover the following topics:

- Confirmation of scope and schedule
- Steering committee meeting schedule (date/time)
- Community engagement schedule and type of engagement (led by WTA)
- Microtransit Project Team meeting schedule and topics
- Data needs

The consultant team will lead monthly check-in meetings with the steering committee to provide an update on the project progress and share key findings. It is anticipated that the check-in meetings with the steering committee will be 15- to 30-minutes. Monthly invoices and progress reports will be submitted to WTA summarizing the work performed.

Deliverables:

- *Agenda and Notes for Kick-Off Meeting*
- *Agenda and Notes Monthly Meeting*
- *Monthly Invoice w/ Progress Report*

Task 2: Project Team Meetings

The following meetings are included as part of the scope of work.

Microtransit Project Team

WTA will lead the Project Team Meetings and Transpo Group and TMD will attend the Microtransit Project Team meetings, which will bring together WTA staff to discuss key project milestones. WTA will identify the staff that will be involved in the Project Team meetings. Meetings will be held monthly for up to 1 hour using a hybrid format. The consultant will attend the meetings virtually. Up to 6 Project Team meetings are included as part of Task 2. Project Team meetings will be scheduled monthly. Potential topics for the Project Team meetings are listed below. Transpo will work with the steering committee on the number of topics per meeting and the order of presenting topics.



1. **Project Kick-Off, Scope, Microtransit Goals/Objectives.** Introduction of the study and scope of work to the Project Team and discussion on service parameters, goals, objectives for Microtransit in Whatcom County.
2. **Identifying Potential Microtransit Zones.** Discuss draft zones developed by consultant team and steering committee to receive input on any missed potential zones and refine rough boundaries of proposed zones.
3. **Service Design Operating Models.** Review on the types of service operating models available for Microtransit and comparison of key metrics like costs, discussion of pros/cons, etc.
4. **Zone Evaluation and Performance Metrics.** Discuss the evaluation criteria which will be used to evaluate zone performance and discuss performance metrics which would be used to evaluate after startup.
5. **Review Zone Evaluation and Priorities.** Review the results of the zone evaluation and make adjustments to zone boundaries and service levels. Develop prioritization based on Project Team feedback.
6. **Technology/Software Options.** Discuss the various software solutions available and evaluate them based on pre-determined metrics.

Coordination and preparation for the meetings will occur during the monthly project management check-in with steering committee described in Task 1. WTA staff will prepare the meeting materials. The consultants will provide WTA with maps, graphics, and other supporting materials for WTA to create presentations.

Community Engagement

WTA will lead community engagement for the study. The consultant will support WTA by providing graphics, presentations and factsheet. All material for community engagement will be based on material being prepared as part of other portions of the study.

No new material will be prepared specifically for community engagement by the consultant. The consultant will review and provide feedback on materials prepared by WTA such as community surveys and website.

Board of Directors and Executive Staff Meeting

The WTA Steering Committee, will lead the presentation on the findings of the draft study to the Executive Staff at one meeting and the Board of Directors at one meeting. One or two staff from Transpo or TMD will attend to provide technical clarification when needed. It is assumed that attendance will be virtual for the Executive Staff and Board meeting. The Board meeting will be held after the Executive Staff meeting. WTA staff will provide minor edits on the presentation following the Executive Staff meeting but the Board presentation will include the same content.

Deliverables:

- *Supporting Materials for Project Team Meetings*
- *Supporting n Materials for Board and Executive Staff Meetings*

Task 3: Identify General Microtransit Zones

The consultant team will work with WTA staff to develop a process to identify potential microtransit zones using a countywide screening process. Data used for this process will include existing WTA ridership, housing, employment, socio-economic characteristics, Replica travel demand data, and trip-table data from the regional travel demand model. WTA will provide ridership, housing, employment and socio-economic characteristics. WTA has initially identified six study areas listed below and the consultant team and WTA will identify up to four additional areas (a total of up to 10 areas). The draft zones will be



presented to the TAC for feedback prior to finalizing. A technical memorandum will be prepared summarizing the recommended microtransit zones based on the TAC meeting feedback. The memorandum will be finalized based on one round of review from WTA. It is noted that this task will define general or rough microtransit zones, which will be further refined as part of Task 5.

Areas to study:

- Ferndale
- Blaine/Birch Bay
- Tweed Twenty/Silver Beach (Bellingham)
- Yew Street/Lake Padden (Bellingham)
- Maple Valley/Kendall
- Lynden
- Up to five additional zones determined during screening process

Deliverables:

- *Technical Memo : Microtransit Zone Identification*
- *GIS Layer of Microtransit Zones*

Task 4: Service Models and Fixed Route Integration

The consultant team will identify up to four (4) service models for operating the microtransit service based on implementation experience and coordination with WTA. Service models will include everything from turnkey to WTA in-house operations and consider how fixed route service could integrate with microtransit service. In addition to drawing on our existing knowledge of alternative microtransit service models being implemented nationally, the consultant team will contact peer agencies and the microtransit software providers to determine best practices and pros/cons of the different service models. Peer agencies will be identified alongside the WTA steering committee with respect to the population and the goals and outcome of the microtransit program. At least two (2) of the peer agencies contacted will have an existing program that comingles paratransit and microtransit services. In addition, at least two (2) software vendors will be reviewed that allow for comingling paratransit and microtransit services. A technical memorandum will be prepared comparing the service model alternatives including key elements such as cost. The memorandum will be finalized based on one round of review from WTA.

Deliverable:

- *Memo: Microtransit Service Models and findings from peer research*

Task 5: Service Design and Ridership Modeling

Task 5 and 6 will be completed on a similar timeline. Service objectives will be defined as part of initial meetings with the Microtransit Project Team and refined to determine performance metrics as part of Task 6. The service objectives like arrival time, in-vehicle journey times, walkshed, required utilization rate, etc will be used to help refine the design for the service. The consultant team will use a spreadsheet model to estimate ridership and resource requirements for the zones identified in Task 3. The consultant has successfully used this spreadsheet for other clients including work with Valley Regional Transit (VRT) and found it to be more refined than the simulators provided by the microtransit companies. The model uses Replica travel demand data to estimate hourly trip demand and average trip length. Other variables of the model include vehicle size and productivity. For this project, the consultant will also develop a wait-time metric, which will be responsive to the number of vehicles provided.

Based on the results of the model, the consultant and WTA will work together to make modifications to the service parameters and Task 3 identified zone boundaries. The consultant team will be given access to WTA's Remix license for estimating the revised service resources required for fixed routes service after the microtransit implementation. The consultant team will provide recommendations on alignment,



frequency and span of service modifications to fixed route service within, to, or near the microtransit zones.

A technical memorandum will be prepared summarizing the service design, ridership modeling and refined zone boundaries. The memorandum will be finalized based on one round of review from WTA.

Deliverable:

- *Memo: Service Design, Ridership Modeling, and Fixed Route Integration with Microtransit Zones*
- *Microtransit Model Spreadsheet Results*

Task 6: Zone Evaluation & Performance Metrics

The consultant team will work collaboratively with WTA to develop evaluation criteria, which will be used to compare the relative performance of the zones. The criteria will be based on the service goals and objectives that will be defined at the kick-off meeting with the Microtransit Project Team. Criteria may include cost, ridership, geographic coverage, efficiency, equity, and environmental benefits. These criteria will also be turned into performance metrics, which will be used to monitor the zones after implementation. A workshop will be held with the TAC to discuss the draft criteria and metrics prior to finalizing and evaluating against the zones (see Task 2). A technical memorandum will be prepared documenting the zone evaluation and performance metrics based on the TAC meeting feedback. The memorandum will be finalized based on one round of review from WTA.

Deliverable:

- *Memo: Zone Evaluation and Performance Metrics*

Task 7: Draft and Final Report

The consultant team will develop a draft and final report for WTA review, which will tie together the memos from the previous tasks. The final report will also include the recommendation related to microtransit operating model and zones as well as an implementation plan outlining the priorities for implementing the new microtransit service. The report will be developed in word format. A project fact sheet / infographic will be developed summarizing the results of the project.

The consultants will make edits to the draft study after reviews by both the Executive Staff and WTA Board of Directors. Edits made after review by the Board will result in the Final Report.

Deliverables:

- *Draft and Final Report*
- *Fact Sheet / Infographic*

SCHEDULE

A project specific schedule will be presented and confirmed at the kick-off meeting. The consultant team anticipates kicking off the work in mid/late-September and completing the project in March/April 2024.

