**Scope of Work**

**Grantee:** Orange County Transportation Authority (OCTA)

**Project Title:** Orange County Bike Connectors Gap Closure Feasibility Study

**INTRODUCTION:**

The Orange County Bike Connectors Gap Closure Feasibility Study (Feasibility Study) will conduct a comprehensive assessment to close bikeway gaps for the Central and South Loops as well as the Cross-County Connector bikeway providing a backbone network that links to other regional and local bikeways. The Feasibility Study will develop solutions to close gaps for the newly envisioned Central Loop, South Loop, and the Cross-County Connector as illustrated in Map A.

The Feasibility Study will provide recommendations for the most cost-effective solutions to provide a continuous and high-quality bikeway network. Grant-ready cost estimates will be developed, positioning cities for funding pursuits or utilization of local funds to advance the bikeways. Recommendations will be refined based on feedback from the agency representatives and disadvantaged community stakeholders to establish ownership of solutions. The feasibility study and recommendations will consider existing and potentially new transportation, housing, and land use planning.

***Disadvantaged Communities***: There are approximately 338 disadvantaged communities and low-income communities (DAC-LI) in Orange County as defined by CalEnviroScreen 3.0 (CES) and Assembly Bill 1550 (AB 1550) See Map E. Maps F and G show Communities of Concern and Environmental Justice Areas, respectively.

More than 50% of the proposed bikeways would serve these disadvantaged communities. Many of the communities qualify for both the top 25% most disadvantaged communities through CES and are also considered low-income communities through AB 1550. According to the recent United Sates Census American Community Survey, several census tracts have transit dependency as high as 49.5% within the cities of Santa Ana and Tustin. This project will connect many disadvantaged communities to job opportunities throughout Orange County.

The Cross-County Connector bikeway from LA to San Diego is directly adjacent to Santa Ana College which ranks 6th among colleges to produce associate degrees for minorities nationwide which serves almost 30,000 students (Community College Week, 2015).

The 174,812 residents of Santa Ana, Garden Grove, and Stanton are most in need of the County Connector bikeway. Map D shows few constructed local bikeways in cities with high population density; Map I shows employment density. These cities have the following pooled data (California Healthy Places Index, 2019): 63% are Latino and 20% Asian. Compared to other California cities, these cities rank as follows: 93rd percentile for traffic density, 69th percentile for coronary heart disease, 51st percentile for obese adults and 42nd percentile for asthma, 84th percentile for economic hardship, and 83rd percentile for K-12 students eligible for free/reduced meals. These statistics indicate this area of incredibly high traffic congestion, poor health and much poverty would highly benefit from a no-cost, healthy alternative mode of travel.

***Background***: OCTA and the County of Orange have collaborated with local jurisdictions to develop and promote the OC Loop, which is a vision for a seamless 66-mile bikeway loop in northern Orange County. The OC Loop a gap closure feasibility analysis was developed using regional agency funding. Through multi-agency efforts and countywide support, the OC Loop has received approximately $30 million in funding for implementation. The OC Loop project is a prototype for the proposed OC Bike Connectors project to close gaps on major countywide bikeways.

**RESPONSIBLE PARTIES:**

OCTA, with the assistance of a consulting firm, will perform this work. OCTA has not yet selected a consulting firm and the proper procurement procedures will be used through a competitive Request for Proposals process. OCTA staff anticipates these figures will not differ substantially and will not exceed the grant request amount.

**OVERALL PROJECT OBJECTIVES:**

1. Engage diverse community members, accounting for needs of disadvantaged populations
2. Utilize innovative outreach to identify and reduce barriers to bikeway network
3. Strengthen link between regional and local bikeway network
4. Increase access to transit centers, employment, housing and other regional destinations
5. Reduce bicyclist exposure to traffic crashes to address both mobility and safety
6. Preserve and enhance sustainable transportation choices
7. Collaborate among jurisdictional agency staff
8. Increase local capacity to advance projects, secure funding, and implement bikeways

* + - 1. **Project Initiation**

 **Task 1.1: Project Kick-off Meeting**

* OCTA will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. A summary of the meeting will be provided with key action items identified.
* Responsible Party: OCTA

 **Task 1.2: Request for Proposals for Consultant Services**

* OCTA will complete a Request for Proposals (RFP) process for selection of a Consultant using the proper procurement procedures. Caltrans staff will be invited to participate in the Consultant selection process.
* Responsible Party: OCTA

**Task 1.3: Consultant Kick-off Meeting**

* OCTA will hold a kick-off meeting with the Consultant team to discuss the project background, goals, schedule, involved agencies, and coordination with Caltrans.

Administrative items will be discussed such as communication protocol, meeting frequency, progress reporting, scheduling and invoicing, and all other relevant project information. A summary of the meeting will be provided with key action items identified.

* Items to be specifically addressed at kick-off meeting:
	+ Monthly project manager (PM) status meetings will occur via telephone (using OCTA conference call phone number) to ensure regular and consistent communication on upcoming tasks, identifying potential risks and challenges to success. Participation in the monthly meetings is anticipated to include the OCTA Project Manager and the Consultant Project Manager.
	+ The status meetings will occur to ensure the project remains on-time, within budget, and expectations are defined. The Consultant will develop a list of topics for discussion and host an online shared document for joint review during the PM status meetings. Notes and actions are to be recorded during the meeting and include a defined list of decisions, actions, and responsible party. The duration of this project is assumed to be 20-24 months, but the Consultant may propose an accelerated schedule.
	+ The Consultant will develop quarterly invoices and progress reports for review during the regular status meetings.
* Responsible Party: OCTA/Consultant

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| Task # | Deliverable |
| 1.1 | Meeting Notes and Action Items |
| 1.2 | Procurement Procedures and Executed Consultant Contract |
| 1.3 | Consultant Kick-off Meeting Notes and Action Items |

* + - 1. **Project Framework**

**Task 2.1: Project Goals and Objectives**

* The Consultant will develop project goals and objectives to guide the project. The goals included in this scope of work will provide a basis and will be refined based on discussion with OCTA, Caltrans and agency staff. The goals will be refined based on Statewide and regional goals for safety, sustainability, mobility and accessibility, and equity, including those in the Caltrans Smart Mobility 2010 Principles.
* Responsible Party: OCTA/Consultant

**Task 2.2: Prior Analysis Review**

* The Consultant will review the four Bikeways Collaborative Studies prepared by OCTA, OC Active, the OC Loop Gap Feasibility Study, the Systemic Safety Plan, and other studies such as the multi-modal Pacific Coast Highway Corridor Study and Beach Boulevard Corridor Study (under preparation).
* The Consultant will evaluate if any gap closure feasibility analysis has been prepared for segments along the OC Bike Connectors to determine the level of revision needed (none, minor, major).
* Responsible Party: OCTA/Consultant

**Task 2.3: Alternative Alignment Evaluation**

* The OC Bike Connectors are based on the regional bikeways identified through the four Bikeways Collaborative Studies conducted between 2010 and 2016. Community and staff engagement was utilized to develop an alignment for each corridor, which now has been leveraged into the bikeways shown on Map A. Refinements and modifications have always been anticipated to respond to evolving conditions and perspectives by local community members and agency staff. Therefore, the Consultant will work with the Project Development Team (discussed below) to determine where revisions to the alignment may now be appropriate.
* The Consultant will identify alternative alignment options for review and consideration. An example alternative alignment exists in the City of Mission Viejo where Cabot Road is identified for a north-south bikeway corridor, but City staff are currently exploring options for a bikeway along the east side of the railroad achieving similar north-south connectivity.
* Alternative alignment evaluation will be conducted early in the project to provide the basis for the gap feasibility analysis and is not expected to remain an open item throughout the project duration. The Consultant will prepare a technical memorandum selecting any alternative alignments based on feedback from the Project Development Team.
* Responsible Party: OCTA/Consultant

**Task 2.4: Style Guide**

* The Consultant will develop a style guide establishing the color scheme for published materials for the project. The style guide will develop a prototype of key deliverables such as presentations, reports, conceptual plans and cost estimates for consideration to ensure the final deliverables will have a consistent theme and appearance. The style guide will assume be developed anticipating a project logo and name. Until the final name and logo is developed, the OC Bike Connectors naming will be utilized for interim deliverables such as technical memorandums.
* The Consultant will verify which agency logos will be shown on deliverables such as Caltrans, OCTA, and local agencies.
* Responsible Party: OCTA/Consultant

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| Task # | Deliverable |
| 2.1 | Goals and Objectives |
| 2.2 | Prior Analysis Technical Memorandum |
| 2.3 | Alternative Alignment Selection Technical Memorandum |
| 2.4 | Style Guide |

1. **Stakeholder Engagement**

The OC Bike Connectors project will utilize public engagement to promote the project and solicit input on alignments and feasibility recommendations. A robust program reflective of the project scope will establish ownership and credibility for future implementation. Additionally, the project will explore innovative virtual methods for collaboration with local agency staff and the public to ensure development of recommendations that are realistic, implementable and reflective of community desires.

**Task 3.1: Facilitate 2 Community Engagement Campaign**

* The Project Team will prepare materials and facilitate up to two (2) outreach campaign events within disadvantaged communities to solicit input from the general public and to increase awareness of the project. These events may consist of virtual information and input campaigns or in person open houses. The events will be publicly noticed to promote attendance, and notices will be in English and a second language. Second language translators will be present and available at the events. Display boards, printed materials, or virtual equivalents will illustrate alternative routes and potential design solutions to overcome challenges.
* The Consultant will develop ways to solicit input from the community about solutions to project constraints. Attendees will be offered an opportunity to provide feedback via comment cards and on interactive boards. The Project Team will prepare a public outreach flyer and promote the event with non-government organizations. Materials will be prepared in English and a second language based on the location; translation will be available on-site.
* The Consultant is encouraged to incorporate community partner organizations as part of the project team to ensure payment for involvement and build increased capacity by local non-profit groups already established within disadvantaged communities.
* Responsible Party: OCTA/Consultant

**Task 3.2: Facilitate 10 Community Pop-Up Events**

* The Consultant shall identify community festivals/events within disadvantaged communities to attend, promote the project, and solicit input. Participation through a booth at community events has proven useful to engage a broad spectrum of the stakeholders to gain project input from the public. While in-person participation is preferable, the consultant will also explore opportunities to achieve the outcomes of this task virtually if community events are not being held due to the COVID-19 pandemic. The Consultant will staff and attend no less than ten (10) community events to engage community members about the project and the events will occur in disadvantaged communities.
* Responsible Party: OCTA/Consultant

**Task 3.3: Facilitate 4 Project Development Team Meetings**

* A Project Development Team (PDT) will be formed consisting of agency staff from jurisdictions represented by the study area. OCTA will promote membership in the PDT consisting of planning and engineering staff. Given the constrained resources of local law enforcement, public safety representatives are not expected to attend the PDT; however, dedicated law enforcement stakeholder meetings are identified in the following subtask.
* The Consultant will lead discussions with the PDT covering project initiation, project approach to community engagement, technical analysis, and project recommendations. PDT meetings will be scheduled and facilitated by the Consultant four (4) times during the project. The Consultant will develop a summary of meeting notes that will be shared with OCTA and the participants. Using the International Association for Public Participation public participation spectrum, the PDT will be asked to collaborate on aspects of the project for decision-making including the development of alternatives and identification of preferred solutions.
* Consistent with grant funding objectives, the Consultant will work with the PDT to identify locally appropriate methods to further engage disadvantaged communities to allow for varying outreach customized for local demographics and cultural norms.
* While in-person participation is preferable, the consultant will also explore opportunities to achieve the outcomes of this task virtually if in person meetings are not being held due to the COVID-19 pandemic.
* Responsible Party: OCTA/Consultant

**Task 3.4: Facilitate 2 Law Enforcement Meetings**

* Utilizing existing OCTA contacts with local law enforcement agencies and city staff, law enforcement representatives will be invited to dedicated public safety meetings, focusing on enforcement issues and concerns related to the OC Bike Connectors.
* The Consultant will review proposed alignments and any conceptual recommendations for the project to solicit input from law enforcement representatives about typical design and site-specific issues. The OCTA Transit Police will be invited as well as law enforcement staff from the involved jurisdictions. Input from law enforcement will be utilized to refine the conceptual recommendations. At least two (2) meetings will be scheduled for involvement by local law enforcement staff in the field or at a centralized in-office location.
* While in-person participation is preferable, the consultant will also explore opportunities to achieve the outcomes of this task virtually if in person meetings are not being held due to the COVID-19 pandemic.
* Responsible Party: OCTA/Consultant

**Task 3.5: OCTA Technical Advisory Committee Meetings**

* OCTA convenes a monthly meeting of the Technical Advisory Committee (TAC), composed of public works representatives from the 34 cities and the County of Orange. Additionally, the TAC includes non-voting members from Caltrans and the Transportation Corridor Agencies (TCA). The Consultant will prepare presentation materials for presentation by OCTA staff at two (2) meetings of the TAC to promote the project and solicit input. OCTA will coordinate the date of the presentations and placement on the agenda.
* Responsible Party: OCTA/Consultant

**Task 3.6: OCTA Bicycle and Pedestrian Subcommittee Meetings**

* OCTA convenes a quarterly Citizens Advisory Committee (CAC) Bicycle and Pedestrian Subcommittee (BPS). Caltrans District 12 staff regularly attend the BPS and provide input. The Consultant will prepare presentation materials for presentation by OCTA staff at two (2) meetings of the BPS to promote the project and solicit input. OCTA will coordinate the date of the presentations and placement on the agenda.
* Responsible Party: OCTA/Consultant

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| Task # | Event(s) | Deliverable |
| 3.1 | Two (2) Community Open Houses | Presentation boards, information materials, or virtual equivalent |
| 3.2 | Ten (10) Community Pop-Up Events  | Handouts, information materials, or virtual equivalent |
| 3.3 | Four (4) PDT Meetings | Presentation materials, notes & summary |
| 3.4 | Two (2) Law Enforcement Meetings | Presentation materials, notes & summary |
| 3.5 | Two (2) OCTA TAC Meetings | Presentation materials |
| 3.6 | Two (2) OCTA BPS Meetings | Presentation materials |

1. **Project Branding**

Since inception, nearly $30 million has been secured for the OC Loop project, partially related to the development of a recognizable brand and name for strong regional bikeways that link to serve northern Orange County. The OC Loop name and branding are easily understood by both technical and non-technical audiences and demonstrates the need for branding the OC Bike Connectors in a similar fashion.

**Task 4.1: Brand Development**

* In collaboration with the PDT and other stakeholders, the Consultant will develop potential project names and logos to brand the project. Branding should include a generalized theme that covers the desired audience ensuring the Connectors serves a broad reach of community members. While the focus for the project is bikeway connectivity, the Consultant will discuss with the PDT if the project branding should expand beyond bicycle travel to additional modes such as walking, running, use mobility assistance devices, skateboarding, scootering and other forms of rolling.
* The project branding including name, logo and theme will be selected based on input and satisfaction of the project goals and objectives.
* In collaboration with the PDT and other stakeholders, the Consultant will develop a project brochure promoting the project, showcasing the benefits of the projects and the needs that are addressed. A similar brochure was developed for the OC Loop project and will be evaluated to determine effectiveness for various purposes such as project awareness and grant pursuits.
* Responsible Party: OCTA/Consultant

**Task 4.2: Project Website**

* The Consultant will provide content for inclusion by OCTA staff on the “Bikeways” section of the OCTA website. The website will identify the project with an overview, schedule, opportunities to participate, and contact information for further questions. Additionally, the Consultant will review the relationship to the OC Loop project to determine how best to incorporate or update information about OC Loop.
* The Consultant will provide content for promotion of the project to members of the public. Promotion will include use of the OCTA “On the Move” electronic newsletter, email promotion, and social media content to be posted on OCTA social media channels.
* Responsible Party: OCTA/Consultant

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| Task # | Deliverable |
| 4.1 | Project Branding (Branding and Brochure) |
| 4.2 | Project Website (Content and Structure) |

1. **Feasibility Analysis & Report**

**Task 5.1: Gap Closure Recommendations**

* The Consultant will develop a gap closure feasibility analysis that approximates 15-percent conceptual design. The gap feasibility analysis will be prepared using aerial images and linework to illustrate the proposed routing and concept to close gaps and overcome key constraints along the proposed corridors. The gap feasibility analysis will be provided to better support future efforts by local agency staff interested in advancing to Preliminary Analysis and Environmental Design.
* The conceptual recommendations will be accompanied by rough cost estimates customized for local market rates for distribution and review by the PDT and agency staff. Discussions with the PDT and applicable agency staff will help refine the concepts and ensure the countermeasure selection is appropriate for the local jurisdiction.
* Based on jurisdictional staff meetings, the draft recommendations and cost estimates will be revised and compiled for inclusion in the summary report.
* Responsible Party: OCTA/Consultant

**Task 5.2: Displacement Evaluation**

* The Consultant will prepare an analysis of potential displacement associated with implementation of regional bikeways. The Geographic Information Systems (GIS) based analysis will evaluate multiple demographic factors associated with potential for displacement such as household income and race/ethnicity. The Consultant will utilize the analysis to determine where overlap with the OC Bike Connectors and provide recommendations to the local jurisdiction to minimize potential displacement of current residents.
* Responsible Party: OCTA/Consultant

**Task 5.3: Final Report**

* The Consultant will prepare an Administrative Draft Summary Report for OCTA and Caltrans review and comment. The report will summarize results from previous tasks, including agency and public engagement efforts, recommendations, cost estimates, and actionable next steps. The report will provide the basis for local agencies when pursuing funding to establish public engagement efforts and document the process for developing realistic and implementable improvements.
* The Consultant will revise the Administrative Draft Summary Report into a Draft Summary Report for review by the local jurisdictions involved in the project. Based in input from the local agency staff, the Final Summary Report will be prepared.
* Responsible Party: OCTA/Consultant

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| **Task #** | **Deliverable** |
| 5.1 | Conceptual Plans and Cost Estimates |
| 5.2 | Displacement Technical Memorandum |
| 5.3 | Administrative Draft & Final Report  |

1. **Fiscal Management**

**Task 6.1 Invoicing**

* OCTA will submit complete invoice packages to Caltrans District staff quarterly. OCTA will develop the quarterly invoicing based on invoices provided by the Consultant.
* Responsible Party: OCTA

**Task 6.2 Quarterly Reports**

* OCTA will submit quarterly reports to Caltrans District staff providing a summary of project progress and grant/local match expenditures. OCTA will develop the quarterly reports based on monthly status reports provided by the Consultant with invoices.
* Responsible Party: OCTA

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| **Task #** | **Deliverable** |
| 6.1 | Invoice packages |
| 6.2 | Quarterly reports |