

**CONSULTING SERVICES AGREEMENT BETWEEN
THE VENTURA COUNTY TRANSPORTATION COMMISSION AND
AMMA TRANSIT PLANNING**

THIS AGREEMENT for consulting services is made by and between the Ventura County Transportation Commission ("VCTC") and AMMA Transit Planning ("Consultant") (together sometimes referred to as the "Parties") as of April 1, 2016 (the "Effective Date").

Section 1. SERVICES. Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to VCTC the services described in the Scope of Work attached hereto and incorporated herein as Exhibit A, at the time and place and in the manner specified therein. In the event of a conflict in or inconsistency between the terms of this Agreement and Exhibit A, the Agreement shall prevail.

- 1.1 **Term of Services.** The term of this Agreement shall begin on the Effective Date and shall end on December 31, 2016, the date of completion specified in Exhibit A, and Consultant shall complete the work described in Exhibit A on or before that date, unless the term of the Agreement is otherwise terminated or extended, as provided for in Section 8. The time provided to Consultant to complete the services required by this Agreement shall not affect VCTC's right to terminate the Agreement, as provided for in Section 8.
- 1.2 **Standard of Performance.** Consultant shall perform all work required by this Agreement in a substantial, first-class manner and shall conform to the standards of quality normally observed by a person practicing in Consultant's profession.
- 1.3 **Assignment of Personnel.** Consultant shall assign only competent personnel to perform services pursuant to this Agreement. In the event that VCTC, in its sole discretion, at any time during the term of this Agreement, desires the reassignment of any such persons, Consultant shall, immediately upon receiving notice from VCTC of such desire of VCTC, reassign such person or persons.
- 1.4 **Time.** Consultant shall devote such time to the performance of services pursuant to this Agreement as may be reasonably necessary to meet the standard of performance provided in Sections 1.1 and 1.2 above and to satisfy Consultant's obligations hereunder.

Section 2. COMPENSATION. VCTC hereby agrees to pay Consultant a sum not to exceed (\$97,545.00) notwithstanding any contrary indications that may be contained in Consultant's proposal, for services to be performed and reimbursable costs incurred under this Agreement. In the event of a conflict between this Agreement and Consultant's proposal, attached as Exhibit A, regarding the amount of compensation, the Agreement shall prevail. VCTC shall pay Consultant for services rendered pursuant to this Agreement at the time and in the manner set forth herein. The payments specified below shall be the only payments from VCTC to Consultant for services rendered pursuant to this Agreement. Consultant shall submit all invoices to VCTC in the manner specified herein. Except as specifically authorized by VCTC in writing, Consultant shall not bill VCTC for duplicate services performed by more than one person.

Consultant and VCTC acknowledge and agree that compensation paid by VCTC to Consultant under this Agreement is based upon Consultant's estimated costs of providing the services required hereunder, including salaries and benefits of employees and subcontractors of Consultant. Consequently, the Parties further agree that compensation hereunder is intended to include the costs of contributions to any pensions and/or annuities to which Consultant and its employees, agents, and subcontractors may be eligible. VCTC therefore has no responsibility for such contributions beyond compensation required under this Agreement.

- 2.1 Invoices.** Consultant shall submit invoices, not more often than once per month during the term of this Agreement, based on the cost for all services performed and reimbursable costs incurred prior to the invoice date. Invoices shall contain all the following information:
- Serial identifications of progress bills (i.e., Progress Bill No. 1 for the first invoice, etc.);
 - The beginning and ending dates of the billing period;
 - A task summary containing the original contract amount, the amount of prior billings, the total due this period, the balance available under the Agreement, and the percentage of completion;
 - At VCTC's option, for each work item in each task, a copy of the applicable time entries or time sheets shall be submitted showing the name of the person doing the work, the hours spent by each person, a brief description of the work, and each reimbursable expense;
 - The total number of hours of work performed under the Agreement by each employee, agent, and subcontractor of Consultant performing services hereunder;
 - The amount and purpose of actual expenditures for which reimbursement is sought;
 - The Consultant's signature.
- 2.2 Monthly Payment.** VCTC shall make monthly payments, based on invoices received, for services satisfactorily performed, and for authorized reimbursable costs incurred. VCTC shall have thirty (30) days from the receipt of an invoice that complies with all of the requirements above to pay Consultant. Each invoice shall include all expenses and actives performed during the invoice period for which Consultant expects to receive payment.
- 2.3 Final Payment.** VCTC shall pay the five percent (5%) of the total sum due pursuant to this Agreement within sixty (60) days after completion of the services and submittal to VCTC of a final invoice, if all services required have been satisfactorily performed.
- 2.4 Total Payment.** VCTC shall pay for the services to be rendered by Consultant pursuant to this Agreement. VCTC shall not pay any additional sum for any expense or cost whatsoever incurred by Consultant in rendering services pursuant to this Agreement. VCTC shall make no payment for any extra, further, or additional service pursuant to this Agreement. In no event shall Consultant submit any invoice for an amount in excess of the maximum amount of compensation provided above either for a task or for the entire

Agreement, unless the Agreement is modified prior to the submission of such an invoice by a properly executed change order or amendment.

- 2.5 Hourly Fees.** Fees for work performed by Consultant on an hourly basis shall not exceed the amounts shown on the compensation schedule attached hereto and incorporated herein as Exhibit B.
- 2.6 Payment of Taxes.** Consultant is solely responsible for the payment of employment taxes incurred under this Agreement and any similar federal or state taxes. Contractor represents and warrants that Contractor is a resident of the State of California in accordance with California Revenue & Taxation Code Section 18662, as it may be amended, and is exempt from withholding. Contractor accepts sole responsible for verifying the residency status of any subcontractors and withhold taxes from non-California subcontractors.
- 2.7 Payment upon Termination.** In the event that VCTC or Consultant terminates this Agreement pursuant to Section 8, VCTC shall compensate the Consultant for all outstanding costs and reimbursable expenses incurred for work satisfactorily completed as of the date of written notice of termination. Consultant shall maintain adequate logs and timesheets to verify costs incurred to that date.
- 2.8 Authorization to Perform Services.** The Consultant is not authorized to perform any services or incur any costs whatsoever under the terms of this Agreement until receipt of authorization from the Contract Administrator.
- 2.9 False Claims Act.** Presenting a false or fraudulent claim for payment, including a change order, is a violation of the California False Claims Act and may result in treble damages and a fine of five thousand (\$5,000) to ten thousand dollars (\$10,000) per violation.

Section 3. INSURANCE REQUIREMENTS. Before beginning any work under this Agreement, Consultant, at its own cost and expense, unless otherwise specified below, shall procure the types and amounts of insurance listed below against claims for injuries to persons or damages to property that may arise from or in connection with the performance of the work hereunder by the Consultant and its agents, representatives, employees, and subcontractors. Consistent with the following provisions, Consultant shall provide proof satisfactory to VCTC of such insurance that meets the requirements of this section and under forms of insurance satisfactory in all respects, and that such insurance is in effect prior to beginning work to VCTC. Consultant shall maintain the insurance policies required by this section throughout the term of this Agreement. The cost of such insurance shall be included in the Consultant's bid. Consultant shall not allow any subcontractor to commence work on any subcontract until Consultant has obtained all insurance required herein for the subcontractor(s). Consultant shall maintain all required insurance listed herein for the duration of this Agreement.

- 3.1 Workers' Compensation.** Consultant shall, at its sole cost and expense, maintain Statutory Workers' Compensation Insurance and Employer's Liability Insurance for any and all persons employed directly or indirectly by Consultant. The Statutory Workers'

Compensation Insurance and Employer's Liability Insurance shall be provided with limits of not less than **\$1,000,000** per accident. In the alternative, Consultant may rely on a self-insurance program to meet those requirements, but only if the program of self-insurance complies fully with the provisions of the California Labor Code. Determination of whether a self-insurance program meets the standards of the Labor Code shall be solely in the discretion of the Contract Administrator, as defined in Section 10.9. The insurer, if insurance is provided, or the Consultant, if a program of self-insurance is provided, shall waive all rights of subrogation against VCTC and its officers, officials, employees, and volunteers for loss arising from work performed under this Agreement.

3.2 Commercial General and Automobile Liability Insurance.

3.2.1 General requirements. Consultant, at its own cost and expense, shall maintain commercial general and automobile liability insurance for the term of this Agreement in an amount not less than \$1,000,000 per occurrence, combined single limit coverage for risks associated with the work contemplated by this Agreement. If a Commercial General Liability Insurance or an Automobile Liability form or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the work to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit. Such coverage shall include but shall not be limited to, protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from activities contemplated under this Agreement, including the use of owned and non-owned automobiles.

3.2.2 Minimum scope of coverage. Commercial general coverage shall be at least as broad as Insurance Services Office Commercial General Liability occurrence form CG 0001 or GL 0002 (most recent editions) covering comprehensive General Liability Insurance and Services Office form number GL 0404 covering Broad Form Comprehensive General Liability on an "occurrence" basis. Automobile coverage shall be at least as broad as Insurance Services Office Automobile Liability form CA 0001 (most recent edition). No endorsement shall be attached limiting the coverage.

3.2.3 Additional requirements. Each of the following shall be included in the insurance coverage or added as a certified endorsement to the policy:

- a. The Insurance shall cover on an occurrence or an accident basis, and not on a claims-made basis.
- b. Any failure of Consultant to comply with reporting provisions of the policy shall not affect coverage provided to VCTC and its officers, employees, agents, and volunteers.

3.3 Professional Liability Insurance.

3.3.1 General requirements. Consultant, at its own cost and expense, shall maintain for the period covered by this Agreement professional liability insurance for licensed professionals performing work pursuant to this Agreement in an amount not less than **\$1,000,000** covering the licensed professionals' errors and omissions. Any deductible or self-insured retention shall not exceed one hundred fifty thousand dollars (\$150,000) per claim.

3.3.2 Claims-made limitations. The following provisions shall apply if the professional liability coverage is written on a claims-made form:

- a. The retroactive date of the policy must be shown and must be before the date of the Agreement.
- b. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the Agreement or the work, so long as commercially available at reasonable rates.
- c. If coverage is canceled or not renewed and it is not replaced with another claims-made policy form with a retroactive date that precedes the date of this Agreement, Consultant shall purchase an extended period coverage for a minimum of five (5) years after completion of work under this Agreement or the work. VCTC shall have the right to exercise, at the Consultant's sole cost and expense, any extended reporting provisions of the policy, if the Consultant cancels or does not renew the coverage.
- d. A copy of the claim reporting requirements must be submitted to VCTC for review prior to the commencement of any work under this Agreement.

3.4 All Policies Requirements.

3.4.1 Acceptability of insurers. All insurance required by this section is to be placed with insurers with a Bests' rating of no less than A:VII.

3.4.2 Verification of coverage. Prior to beginning any work under this Agreement, Consultant shall furnish VCTC with complete copies of all policies delivered to Consultant by the insurer, including complete copies of all endorsements attached to those policies. All copies of policies and certified endorsements shall show the signature of a person authorized by that insurer to bind coverage on its behalf. If VCTC does not receive the required insurance documents prior to the Consultant beginning work, this shall not waive the Consultant's obligation to provide them. VCTC reserves the right to require complete copies of all required insurance policies at any time.

3.4.3 Notice of Reduction in or Cancellation of Coverage. A certified endorsement shall be attached to all insurance obtained pursuant to this Agreement stating that coverage shall not be suspended, voided, canceled by either party, or reduced in coverage or in limits, except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to VCTC. In the event that any coverage required by this section is reduced, limited, cancelled, or materially affected in any other manner, Consultant shall provide written notice to VCTC at Consultant's earliest possible opportunity and in no case later than ten (10) working days after Consultant is notified of the change in coverage.

3.4.4 Additional insured; primary insurance. VCTC and its officers, employees, agents, and volunteers shall be covered as additional insureds with respect to each of the following: liability arising out of activities performed by or on behalf of Consultant, including VCTC's general supervision of Consultant; products and completed operations of Consultant, as applicable; premises owned, occupied, or used by Consultant; and automobiles owned, leased, or used by the Consultant in the course of providing services pursuant to this Agreement. The coverage shall contain no special limitations on the scope of protection afforded to VCTC or its officers, employees, agents, or volunteers.

A certified endorsement must be attached to all policies stating that coverage is primary insurance with respect to VCTC and its officers, officials, employees and volunteers, and that no insurance or self-insurance maintained by VCTC shall be called upon to contribute to a loss under the coverage.

3.4.5 Deductibles and Self-Insured Retentions. Consultant shall disclose to and obtain the approval of City for the self-insured retentions and deductibles before beginning any of the services or work called for by any term of this Agreement. Further, if the Consultant's insurance policy includes a self-insured retention that must be paid by a named insured as a precondition of the insurer's liability, or which has the effect of providing that payments of the self-insured retention by others, including additional insureds or insurers do not serve to satisfy the self-insured retention, such provisions must be modified by special endorsement so as to not apply to the additional insured coverage required by this agreement so as to not prevent any of the parties to this agreement from satisfying or paying the self-insured retention required to be paid as a precondition to the insurer's liability. Additionally, the certificates of insurance must note whether the policy does or does not include any self-insured retention and also must disclose the deductible.

During the period covered by this Agreement, only upon the prior express written authorization of Contract Administrator, Consultant may increase such deductibles or self-insured retentions with respect to VCTC, its officers, employees, agents, and volunteers. The Contract Administrator may condition approval of an increase in deductible or self-insured retention levels with a requirement that Consultant procure a bond, guaranteeing payment of losses and related investigations, claim

administration, and defense expenses that is satisfactory in all respects to each of them.

3.4.6 Subcontractors. Consultant shall include all subcontractors as insureds under its policies or shall furnish separate certificates and certified endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

3.4.7 Wasting Policy. No insurance policy required by Section 3 shall include a “wasting” policy limit.

3.4.8 Variation. VCTC may approve a variation in the foregoing insurance requirements, upon a determination that the coverage, scope, limits, and forms of such insurance are either not commercially available, or that VCTC’s interests are otherwise fully protected.

3.5 Remedies. In addition to any other remedies VCTC may have if Consultant fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, VCTC may, at its sole option exercise any of the following remedies, which are alternatives to other remedies VCTC may have and are not the exclusive remedy for Consultant’s breach:

- a. Obtain such insurance and deduct and retain the amount of the premiums for such insurance from any sums due under the Agreement;
- b. Order Consultant to stop work under this Agreement or withhold any payment that becomes due to Consultant hereunder, or both stop work and withhold any payment, until Consultant demonstrates compliance with the requirements hereof; and/or
- c. Terminate this Agreement.

Section 4. INDEMNIFICATION AND CONSULTANT’S RESPONSIBILITIES. Consultant shall, to the fullest extent allowed by law, with respect to all Services performed in connection with this Agreement, indemnify, defend with counsel selected by VCTC, and hold harmless VCTC and its officials, officers, employees, agents, and volunteers from and against any and all losses, liability, claims, suits, actions, damages, and causes of action arising out of any personal injury, bodily injury, loss of life, or damage to property, or any violation of any federal, state, or municipal law or ordinance (“Claims”), to the extent caused, directly or indirectly, in whole or in part, by the willful misconduct or negligent acts or omissions of Consultant or its employees, subcontractors, or agents. The foregoing obligation of Consultant shall not apply when (1) the injury, loss of life, damage to property, or violation of law arises wholly from the gross negligence or willful misconduct of VCTC or its officers, employees, agents, or volunteers and (2) the actions of Consultant or its employees, subcontractor, or agents have contributed in no part to the injury, loss of life, damage to property, or violation of law.

- 4.1 **Insurance Not in Place of Indemnity.** Acceptance by VCTC of insurance certificates and endorsements required under this Agreement does not relieve Consultant from liability under this indemnification and hold harmless clause. This indemnification and hold harmless clause shall apply to any damages or claims for damages whether or not such insurance policies shall have been determined to apply. By execution of this Agreement, Consultant acknowledges and agrees to the provisions of this Section and that it is a material element of consideration.
- 4.2 **PERS Liability.** In the event that Consultant or any employee, agent, or subcontractor of Consultant providing services under this Agreement is determined by a court of competent jurisdiction or the California Public Employees Retirement System (PERS) to be eligible for enrollment in PERS as an employee of VCTC, Consultant shall indemnify, defend, and hold harmless VCTC for the payment of any employee and/or employer contributions for PERS benefits on behalf of Consultant or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of VCTC.
- 4.3 **Third Party Claims.** With respect to third party claims against the Consultant, the Consultant waives any and all rights of any type of express or implied indemnity against the Indemnitees.

Section 5. STATUS OF CONSULTANT.

- 5.1 **Independent Contractor.** At all times during the term of this Agreement, Consultant shall be an independent contractor and shall not be an employee of VCTC. VCTC shall have the right to control Consultant only insofar as the results of Consultant's services rendered pursuant to this Agreement and assignment of personnel pursuant to Subparagraph 1.3; however, otherwise VCTC shall not have the right to control the means by which Consultant accomplishes services rendered pursuant to this Agreement. Notwithstanding any other VCTC, state, or federal policy, rule, regulation, law, or ordinance to the contrary, Consultant and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to, and hereby agree to waive any and all claims to, any compensation, benefit, or any incident of employment by VCTC, including but not limited to eligibility to enroll in the California Public Employees Retirement System (PERS) as an employee of VCTC and entitlement to any contribution to be paid by VCTC for employer contributions and/or employee contributions for PERS benefits.
- 5.2 **Consultant Not an Agent.** Except as VCTC may specify in writing, Consultant shall have no authority, express or implied, to act on behalf of VCTC in any capacity whatsoever as an agent to bind VCTC to any obligation whatsoever.

Section 6. LEGAL REQUIREMENTS.

- 6.1 **Governing Law.** The laws of the State of California shall govern this Agreement.

- 6.2 Compliance with Applicable Laws.** Consultant and any subcontractors shall comply with all federal, state and local laws and regulations applicable to the performance of the work hereunder. Consultant's failure to comply with such law(s) or regulation(s) shall constitute a breach of contract.
- 6.3 Other Governmental Regulations.** To the extent that this Agreement may be funded by fiscal assistance from another governmental entity, Consultant and any subcontractors shall comply with all applicable rules and regulations to which VCTC is bound by the terms of such fiscal assistance program.
- 6.4 Licenses and Permits.** Consultant represents and warrants to VCTC that Consultant and its employees, agents, and any subcontractors have all licenses, permits, qualifications, and approvals, including from VCTC, of whatsoever nature that are legally required to practice their respective professions. Consultant represents and warrants to VCTC that Consultant and its employees, agents, any subcontractors shall, at their sole cost and expense, keep in effect at all times during the term of this Agreement any licenses, permits, and approvals that are legally required to practice their respective professions. In addition to the foregoing, Consultant and any subcontractors shall obtain and maintain during the term of this Agreement valid Business Licenses from VCTC.
- 6.5 Nondiscrimination and Equal Opportunity.** Consultant shall not discriminate, on the basis of a person's race, religion, color, national origin, age, physical or mental handicap or disability, medical condition, marital status, sex, or sexual orientation, against any employee, applicant for employment, subcontractor, bidder for a subcontract, or participant in, recipient of, or applicant for any services or programs provided by Consultant under this Agreement. Consultant shall comply with all applicable federal, state, and local laws, policies, rules, and requirements related to equal opportunity and nondiscrimination in employment, contracting, and the provision of any services that are the subject of this Agreement, including but not limited to the satisfaction of any positive obligations required of Consultant thereby.

Consultant shall include the provisions of this Subsection in any subcontract approved by the Contract Administrator or this Agreement.

Section 7. TERMINATION AND MODIFICATION.

- 7.1 Termination.** VCTC may cancel this Agreement at any time and without cause upon written notification to Consultant.

Consultant may cancel this Agreement for cause upon thirty (30) days' written notice to VCTC and shall include in such notice the reasons for cancellation.

In the event of termination, Consultant shall be entitled to compensation for services performed to the effective date of notice of termination; VCTC, however, may condition

payment of such compensation upon Consultant delivering to VCTC all materials described in Section 8.1.

- 7.2 Extension.** VCTC may, in its sole and exclusive discretion, extend the end date of this Agreement beyond that provided for in Subsection 1.1. Any such extension shall require Contractor to execute a written amendment to this Agreement, as provided for herein. Consultant understands and agrees that, if VCTC grants such an extension, VCTC shall have no obligation to provide Consultant with compensation beyond the maximum amount provided for in this Agreement. Similarly, unless authorized by the Contract Administrator, VCTC shall have no obligation to reimburse Consultant for any otherwise reimbursable expenses incurred during the extension period.
- 7.3 Amendments.** The Parties may amend this Agreement only by a writing signed by all the Parties.
- 7.4 Assignment and Subcontracting.** VCTC and Consultant recognize and agree that this Agreement contemplates personal performance by Consultant and is based upon a determination of Consultant's unique personal competence, experience, and specialized personal knowledge. Moreover, a substantial inducement to VCTC for entering into this Agreement was and is the professional reputation and competence of Consultant. Consultant may not assign this Agreement or any interest therein without the prior written approval of the Contract Administrator. Consultant shall not assign or subcontract any portion of the performance contemplated and provided for herein, other than to the subcontractors noted in the proposal, without prior written approval of the Contract Administrator.
- 7.5 Survival.** All obligations arising prior to the termination of this Agreement and all provisions of this Agreement allocating liability between VCTC and Consultant shall survive the termination of this Agreement.
- 7.6 Options upon Breach by Consultant.** If Consultant materially breaches any of the terms of this Agreement, VCTC's remedies shall include, but not be limited to, the following:
- 7.6.1** Immediately terminate the Agreement;
 - 7.6.2** Retain the plans, specifications, drawings, reports, design documents, and any other work product prepared by Consultant pursuant to this Agreement;
 - 7.6.3** Retain a different consultant to complete the work described in Exhibit A not finished by Consultant; or
 - 7.6.4** Charge Consultant the difference between the cost to complete the work described in Exhibit A that is unfinished at the time of breach and the amount that VCTC would have paid Consultant pursuant to Section 2 if Consultant had completed the work.

Section 8. KEEPING AND STATUS OF RECORDS.

- 8.1 Records Created as Part of Consultant's Performance.** All reports, data, maps, models, charts, studies, surveys, photographs, memoranda, plans, studies, specifications, records, files, or any other documents or materials, in electronic or any other form, that Consultant prepares or obtains pursuant to this Agreement and that relate to the matters covered hereunder shall be the property of VCTC. Consultant hereby agrees to deliver those documents to VCTC upon termination of the Agreement. It is understood and agreed that the documents and other materials, including but not limited to those described above, prepared pursuant to this Agreement are prepared specifically for VCTC and are not necessarily suitable for any future or other use. VCTC and Consultant agree that, until final approval by VCTC, all data, plans, specifications, reports and other documents are confidential and will not be released to third parties without prior written consent of both Parties except as required by law.
- 8.2 Consultant's Books and Records.** Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to VCTC under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to the Consultant to this Agreement.
- 8.3 Inspection and Audit of Records.** Any records or documents that Section 8.2 of this Agreement requires Consultant to maintain shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of VCTC. Under California Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds ten thousand (\$10,000.00), the Agreement shall be subject to the examination and audit of the State Auditor, at the request of VCTC or as part of any audit of VCTC, for a period of three (3) years after final payment under the Agreement.
- 8.4 Records Submitted in Response to an Invitation to Bid or Request for Proposals.** All responses to a Request for Proposals (RFP) or invitation to bid issued by VCTC become the exclusive property of VCTC. At such time as VCTC selects a bid, all proposals received become a matter of public record, and shall be regarded as public records, with the exception of those elements in each proposal that are defined by Consultant and plainly marked as "Confidential," "Business Secret" or "Trade Secret."

VCTC shall not be liable or in any way responsible for the disclosure of any such proposal or portions thereof, if Consultant has not plainly marked it as a "Trade Secret" or "Business Secret," or if disclosure is required under the Public Records Act.

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, VCTC may not be in a position to establish that the information that a prospective bidder submits is a trade secret. If a request is

made for information marked "Trade Secret" or "Business Secret," and the requester takes legal action seeking release of the materials it believes does not constitute trade secret information, by submitting a proposal, Consultant agrees to indemnify, defend and hold harmless VCTC, its agents and employees, from any judgment, fines, penalties, and award of attorneys fees awarded against VCTC in favor of the party requesting the information, and any and all costs connected with that defense. This obligation to indemnify survives VCTC's award of the contract. Consultant agrees that this indemnification survives as long as the trade secret information is in VCTC's possession, which includes a minimum retention period for such documents.

Section 9 **MISCELLANEOUS PROVISIONS.**

- 9.1 **Attorneys' Fees.** If a Party to this Agreement brings any action, including arbitration or an action for declaratory relief, to enforce or interpret the provision of this Agreement, the prevailing Party shall be entitled to reasonable attorneys' fees in addition to any other relief to which that Party may be entitled. The court may set such fees in the same action or in a separate action brought for that purpose.
- 9.2 **Venue.** In the event that either Party brings any action against the other under this Agreement, the Parties agree that trial of such action shall be vested exclusively in the state courts of California in the County of Ventura or in the United States District Court for the Central District of California.
- 9.3 **Severability.** If a court of competent jurisdiction finds or rules that any provision of this Agreement is invalid, void, or unenforceable, the provisions of this Agreement not so adjudged shall remain in full force and effect. The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.
- 9.4 **No Implied Waiver of Breach.** The waiver of any breach of a specific provision of this Agreement does not constitute a waiver of any other breach of that term or any other term of this Agreement.
- 9.5 **Successors and Assigns.** The provisions of this Agreement shall inure to the benefit of and shall apply to and bind the successors and assigns of the Parties.
- 9.6 **Use of Recycled Products.** Consultant shall prepare and submit all reports, written studies and other printed material on recycled paper to the extent it is available at equal or less cost than virgin paper.
- 9.7 **Conflict of Interest.** Consultant may serve other clients, but none whose activities within the corporate limits of VCTC or whose business, regardless of location, would place Consultant in a "conflict of interest," as that term is defined in the Political Reform Act, codified at California Government Code Section 81000, *et seq.*

Consultant shall not employ any VCTC official in the work performed pursuant to this Agreement. No officer or employee of VCTC shall have any financial interest in this Agreement that would violate California Government Code Sections 1090, *et seq.*

Consultant hereby warrants that it is not now, nor has it been in the previous twelve (12) months, an employee, agent, appointee, or official of VCTC. If Consultant was an employee, agent, appointee, or official of VCTC in the previous twelve (12) months, Consultant warrants that it did not participate in any manner in the forming of this Agreement. Consultant understands that, if this Agreement is made in violation of Government Code §1090, *et seq.*, the entire Agreement is void and Consultant will not be entitled to any compensation for services performed pursuant to this Agreement, including reimbursement of expenses, and Consultant will be required to reimburse VCTC for any sums paid to the Consultant. Consultant understands that, in addition to the foregoing, it may be subject to criminal prosecution for a violation of Government Code § 1090 and, if applicable, will be disqualified from holding public office in the State of California.

- 9.8 **Solicitation.** Consultant agrees not to solicit business at any meeting, focus group, or interview related to this Agreement, either orally or through any written materials.
- 9.9 **Contract Administration.** This Agreement shall be administered by Ellen Talbo ("Contract Administrator"). All correspondence shall be directed to or through the Contract Administrator or his or her designee.
- 9.10 **Notices.** All notices and other communications which are required or may be given under this Agreement shall be in writing and shall be deemed to have been duly given (i) when received if personally delivered; (ii) when received if transmitted by telecopy, if received during normal business hours on a business day (or if not, the next business day after delivery) provided that such facsimile is legible and that at the time such facsimile is sent the sending Party receives written confirmation of receipt; (iii) if sent for next day delivery to a domestic address by recognized overnight delivery service (e.g., Federal Express); and (iv) upon receipt, if sent by certified or registered mail, return receipt requested. In each case notice shall be sent to the respective Parties as follows:

Consultant
Heather Menninger
AMMA Transit Planning
393 Two Trees Road
Riverside, CA 92507

VCTC
Ellen Talbo
Transit Planning Manager
Ventura County Transportation Commission
950 County Square Drive, Suite 207
Ventura, CA 93003

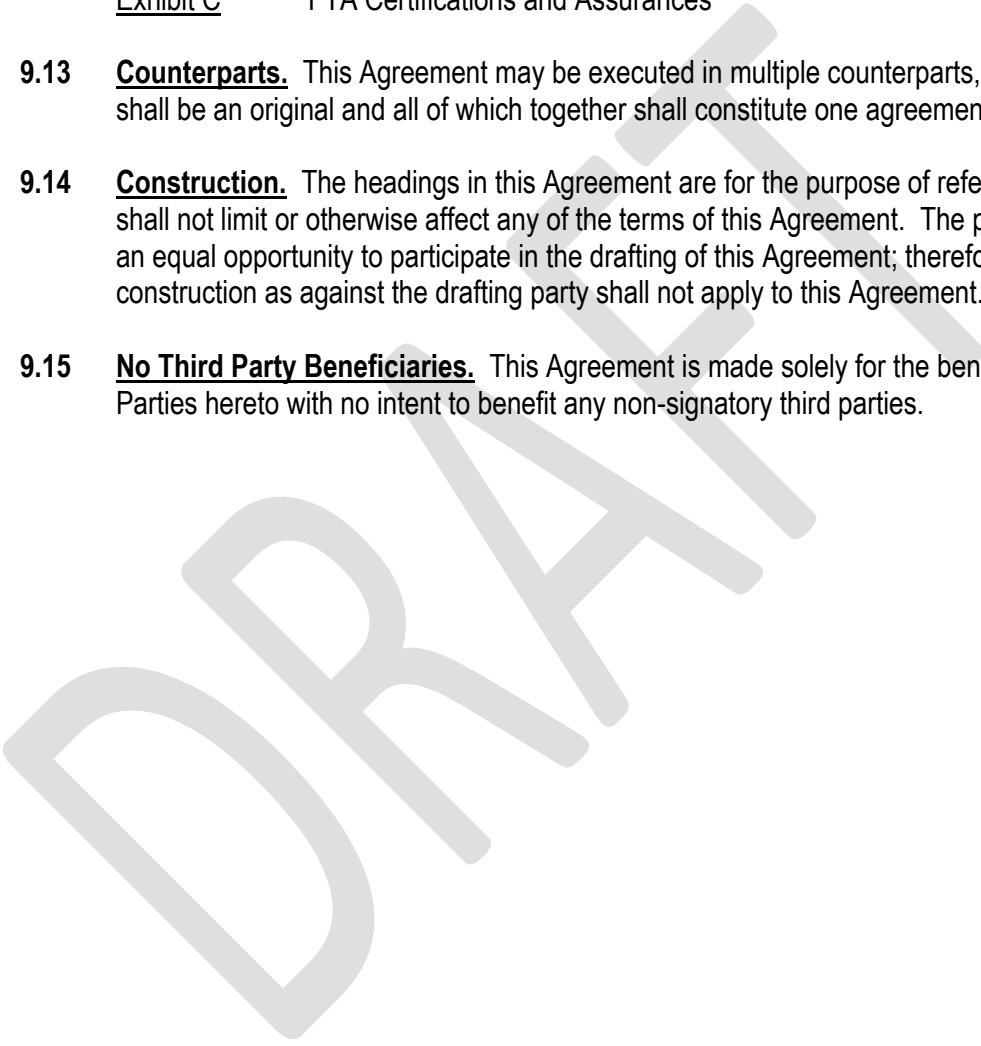
9.12 Integration. This Agreement, including the scope of work attached hereto and incorporated herein as Exhibits A and B represents the entire and integrated agreement between VCTC and Consultant and supersedes all prior negotiations, representations, or agreements, either written or oral pertaining to the matters herein.

<u>Exhibit A</u>	Scope of Services
<u>Exhibit B</u>	Compensation Schedule
<u>Exhibit C</u>	FTA Certifications and Assurances

9.13 Counterparts. This Agreement may be executed in multiple counterparts, each of which shall be an original and all of which together shall constitute one agreement.

9.14 Construction. The headings in this Agreement are for the purpose of reference only and shall not limit or otherwise affect any of the terms of this Agreement. The parties have had an equal opportunity to participate in the drafting of this Agreement; therefore any construction as against the drafting party shall not apply to this Agreement.

9.15 No Third Party Beneficiaries. This Agreement is made solely for the benefit of the Parties hereto with no intent to benefit any non-signatory third parties.



The Parties have executed this Agreement as of the Effective Date.

VCTC

CONSULTANT

Darren Kettle, General Manager

Heather Menninger, Principal

Approved as to Form:

Steven T. Mattas, General Counsel

DRAFT

EXHIBIT A

SCOPE OF SERVICES

Phase I – Review of Existing Conditions and Outreach to Identify Mobility Needs

Task	Task Description	Deliverable
Task 1	Project Kick off	
	<ul style="list-style-type: none"> - Discussion of key background issues and concerns of VCTC/stakeholder group - Review Scope of Services - Review proposed schedule and various external dates - Discussion of outreach activities and requirements - Review and determine data collection needs 	<ol style="list-style-type: none"> 1) Kick off memo agenda 2) A formal memorandum summarizing outcomes of the kickoff meeting and any mutually agreed-to scope modifications
Task 2	Existing Conditions and Assessment of Available Services	
2.1	Review of relevant reports and legislation	<ol style="list-style-type: none"> 1) A report of Existing Conditions and Assessment of Resources that also discusses the following elements: <ul style="list-style-type: none"> - Review of key studies and legislation with a reporting on findings of relevance - Compilation of demographic information that identifies patterns and trends - An inventory framework from which to assess available transportation services
2.2	Demographic analysis of target populations	
2.3	Inventory of existing transportation services	
Task 3	Assessment of Transportation Needs	
3.1	Develop and administer stakeholder survey	<ol style="list-style-type: none"> 1) Agency stakeholder listing expanded and/or updated 2) Draft and final agency survey, and distribution of survey via email and surface mail 3) Stakeholder workshop venues identified and secured; flyers prepared and distributed to promote workshops; some recruitment to workshops 4) Up to 3 stakeholder workshops conducted, seeking 15-25 participants at each 5) Consumer focus group identified and secured relying upon agency assistance to secure participation of up 8-12 at each of the 4 focus groups including at least one with
3.2	Conduct Public Workshop and Consumer Focus Group Meetings	
3.3	Document and Identify Unmet Needs and Gaps in Service	

		Spanish translation 6) Review of two cycles of Unmet Needs documentation 7) Preparation of Report of Findings: Assessment of Mobility Needs and Gaps
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Phase II – Strategies Responsive to Mobility Needs Identified and Prioritized

Task 4	Strategies, Activities and/or Projects to Address Identified Gaps	
4.1	Development of strategies by subarea, market group, service type and trip type	1) A matrix of alternative policies, strategies and actions
Task 5	Priorities for Implementation	
	Define the priorities of VCTC’s agency goals in terms of the target groups of older adults, persons with disabilities, and persons of low income	1) Initial strategies descriptions for use in the workshops 2) Draft Coordinated Plan 3) Schedule and conduct two stakeholder Prioritization Workshops 4) Revised Matrix of Goals, Objectives, Strategies, and Projects to reflect key stakeholder input

Phase III – Final Plan Preparation and Presentation

Task 6	Compile Final Report and Presentations	
	This task provides for developing the second draft plan document, towards preparation of the Final Coordinated Plan and its presentation to the CTAC/SSTAC, Transcom, Stakeholder Committee, and Commission	1) Review meeting with VCTC staff to discuss the prioritization of findings and areas of revision to the Draft Plan 2) Final Draft Coordinated Plan document and required copies 3) Presentations to the CTAC/SSTAC, Transcom, and Commission

Refer to the included proposal in Exhibit A on the next page for additional descriptive details of the Tasks and Deliverables.



**Request for Qualifications:
VENTURA COUNTY COORDINATED
PUBLIC TRANSIT-HUMAN SERVICES
TRANSPORTATION PLAN
2016 REVISION**

Submitted to:

Ventura County Transportation Commission
Attn: Ellen Talbo, Transit Planning Manager
950 County Square Drive #207
Ventura, CA 93003

Submitted by:



In Collaboration with:



February 1, 2016



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Request for Qualifications:
**VENTURA COUNTY COORDINATED
PUBLIC TRANSIT-HUMAN SERVICES
TRANSPORTATION PLAN 2016 REVISION**

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393 TWO TREES ROAD
RIVERSIDE, CA 92507
PH: 951-784-1333
FX: 951-784-1212
www.AmmaTransitPlanning.com

January 31, 2015

Ms. Ellen Talbo, AICP
Transit Planning Manager
Ventura County Transportation Commission
950 County Square Drive, # 207
Ventura, CA. 93003

Dear Ms. Talbo,

AMMA Transit Planning, in association with **Mobility Planners, LLC**, is pleased to present to you this proposal for the preparation of the *Ventura County Coordinated Public Transit-Human Services Transportation Plan 2016 Revision*. As you may know, **AMMA Transit Planning** assisted with Ventura County's first Coordinated Plan in 2007 and prepared the 2012 Update. We have significant experience with the preparation of these plans. I was project manager for the recently concluded updates for Los Angeles Metro and Orange County Transportation Authority, assisted with the Bay Area's Coordinated Plan update and undertaken others in multiple areas of California, Oregon and Arizona. Coordinated Plan development is one area of AMMA's focus on multi-modal transit planning and with a particular emphasis on demand responsive transportation services.

Mobility Planners, LLC assisted AMMA with the recent Los Angeles Metro update and with Imperial County's Coordinated Plan. Owner Clifford Chambers was prime contractor for the Fresno County Coordinated Plan, on which AMMA was a team member, and recently finished the Stanislaus County Coordinated Plan. Mobility Planners has undertaken numerous transit planning studies across the state to improve rural and small urban transit services and the intercity connections to urbanized areas, including work in California and Arizona.

Our approach design to this Coordinated Plan 2016 Revision addresses the elements of your Request for Qualifications. To more fully comply with MAP-21 regulatory direction, we created public involvement opportunities around the prioritization of the strategies and projects. We also added a stakeholder agency survey component that we have found to greatly assist in the development of the inventory and in creating a more comprehensive assessment of transportation services within the County.

Our proposal is structured around three phases:

- Phase I** –Compilation of Existing Conditions Including the Assessment of Services and of Mobility Needs
- Phase II** – Development of Strategies and the Draft Plan with Community Participation Around Prioritization of Strategies and Projects
- Phase III** – Preparation of the Final 2016 Coordinated Plan Revision and Presentation



Ms. Ellen Talbo, January 31, 2016, page two

One of the particular strengths of our team is the process by which we identify and then prioritize, with public participation, strategies that are responsive to mobility needs emerging through the outreach and assessment processes. Our approach and public processes emphasize both listening and education. It is important that we construct a variety of ways in which to hear and learn about the mobility needs of Ventura County residents who are older, have disabilities or are of low-income. An important product are the prioritized goals, strategies and projects that provide broad enough “buckets” for future FTA 5310 grant applicants with enough flexibility to include a wide array of projects that address mobility and information gaps throughout Ventura County. It is equally important that we use these as education opportunities to communicate what the existing transportation network can and can’t do, given the limits of Ventura County’s public transit “purse.”

Our proposal recognizes the size of Ventura County, but also its complexity in terms of the mix of public transit and specialized transportation providers and the large urban as well as small urban county areas that will impact the availability of Section 5310 funds to Ventura County. Our proposal price of \$97,542 supports 684 direct labor hours and all of the direct project expenses over an estimated eight-month time frame. We believe this is the level-of-effort needed to assure preparation of a nuanced and valuable Coordinated Plan 2016 Revision, reflecting the current mobility concerns of the Plans target group members and engaging consumers and stakeholders as partners in helping to address those mobility needs.

We believe that this Coordinated Plan 2016 Revision – as a “next generation” Coordinated Plan – can assist the Ventura County leadership in its mission of **Moving Ventura County**, for older adults, persons with disabilities and low-income persons but also for the general public. We have learned that the particular issues and concerns of these individuals are often shared by the broadest ridership groups. In addressing these, and in continuing to tell the story of public transportation to a broad array of constituents at this time in Ventura County’s history, we believe this will further the VCTC Commissioners’ aims of increasing mobility for Ventura residents, students, retirees and workers.

I am the point of contact for this proposal and the AMMA team and can be reached at (951) 784-1333 or by email at Heather@AmmaTransitPlanning.com . Should you wish to schedule interviews next week, our team could be available on Monday, Feb. 8th or Wednesday Feb. 10th. Prior commitments preclude our availability on other days.

We did not identify any addenda to the RFQ released on January 14th. This proposal stands firm for ninety (90) days. And while we have done our best to be responsive to the proposal requirements as we understood them, we are happy to discuss, review and potentially modify our approach if there is a better way of addressing VCTC requirements. We hope very much to hear from you and to secure the opportunity of preparing the Coordinated Plan 2016 Revision as we would like to be a part of the continuing story of public transportation in Ventura County. Thank you for your review of our proposal.

Sincerely,



Heather Menninger



Request for Qualifications:

VENTURA COUNTY COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN 2016 REVISION

Introduction and Project Understanding

This proposal is presented by **AMMA Transit Planning** as prime consultant, bringing its substantial Coordinated Plan credentials to this effort and **Mobility Planners, LLC**, a firm with extensive transit planning, human service agency coordination, and mobility management experience across the state. This team brings the wealth of their experience in transit, specialized transit, coordination planning and communications to the *Ventura County Coordinated Public Transit-Human Services Transportation Plan 2016 Revision*.

Drawing Upon What We've Learned About the Coordinated Plan Process

The AMMA team has learned what makes a successful Coordinated Plan over the past nine years, having participated in the development of Ventura County's first Coordinated Plan in 2007 and prepared its update in 2012, as well as in the preparation of dozens of other Coordinated Plan across California and in the western United States. Strong coordinated plans have helped participating stakeholders prioritize their activities and better target ever-scarce resources to mobility projects. A good Plan readily supports grant applications. It supports improved or more extensive dialogue between transit and human services organizations – thereby leading to new projects. A good Plan leads to increased knowledge of available public transit, as well as its limitations. It provides concrete direction for improving mobility of the target groups.

Key attributes of such a Plan include:

- Carefully developed priorities.
- A focus on supporting grant-writing, for planned and unanticipated discretionary grants.
- Seeks to improve competitiveness for scarce grant funds.
- Improved communication tools to educate about available public transit, using language tools appropriate to each community.
- Grows system capacity, which translates to provision of more trips.
- Strengthens land-use and transportation connections.



The AMMA Team’s Tested Experience

Our team brings five key experiences to this work that will ensure VCTC has a Coordinated Plan 2016 Revision that is useful and moves forward the mobility of the County’s older adults, persons with disabilities and residents of low income.

- **Local knowledge that is relevant to the coordination experience.** Heather Menninger and Dennis Brooks both worked with the original 2007 Ventura County Coordinated Plan and, with Valerie Mackintosh, undertook the outreach and prepared the 2008 Plan Update. This team prepared the recently adopted *2016-2019 Los Angeles County Coordinated Public Transit-Human Services Transportation Plan* which was well received by each of the diverse audiences of the Metro Board of Directors, transportation advocates and agency stakeholders.
- **Focus on the Coordinated Plan’s “what’s next” aspects.** This team has worked on the “next generation” approaches to the Coordinated Plan process and these include defined measures that recognize impact, as well as enhanced outreach strategies for reaching the Plan’s target populations. In both Los Angeles and Orange County coordinated plans, the trip demand estimate and consideration of performance measurement were particularly important. Within the past two years, AMMA has worked with Mobility Planners LLC to include an extensive survey of transportation disadvantaged populations in the Fresno County Coordinated Plan; craft a complete set of new goals, strategies, and prioritized projects for the Imperial County Coordinated Plan; and based on extensive stakeholder meetings, focus groups, and public outreach to develop subregional and regional strategies and projects for LA Metro.
- **Orientation to Implementation with National and State leadership in providing innovative communications tools, implementation guide books and regulatory compliance training.** Heather Menninger was co-author of TCRP Report 165 *Community Tools to Assist Veterans Transportation* and brings that particular focus on veterans’ mobility concerns, particularly for those veterans who may have left the service from the Point Mugu Naval Air Station. Cliff Chambers’ role as Principal Investigator for an earlier TCRP report focused on the institutional challenges to coordination, useful in working with Ventura County’s mix of public and social service transportation providers. Mr. Chambers also was a co-author of TCRP report on helping transportation agencies become mobility managers. And AMMA’s Valerie Sedig provided Title VI program training across the state to operators grappling with new outreach requirements, among others, which informs this effort’s approach to outreach to Limited English Proficient participants, for example in the Heritage Valley and elsewhere.
- **Emphasis on Mobility Management and reporting outcomes.** Cliff Chambers and Heather Menninger both have significant experience in reporting on the impacts of mobility initiatives. Mr. Chambers has worked with over ten transit agencies to consider mobility management strategies as part of their family of services. Mobility managers seek to go beyond traditional public transportation services to fill mobility gaps, especially for the target populations of the Coordinated Plan. Similarly, Heather’s design of a new countywide transit performance report

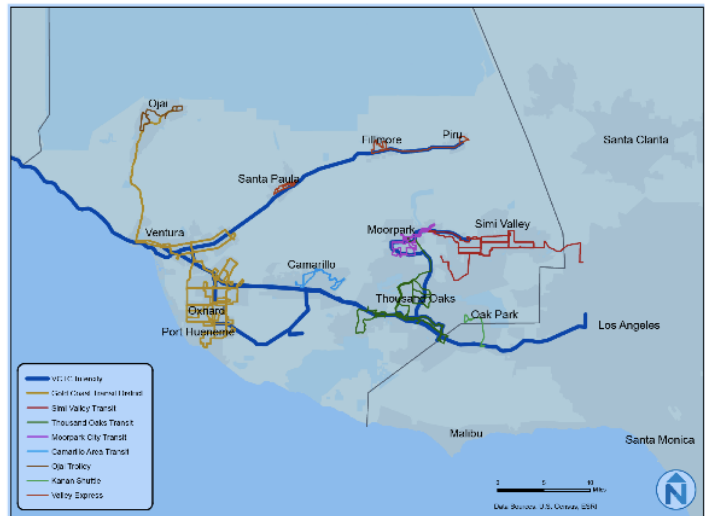


for Riverside County incorporates specialized transit services and reports back on trends in increasing capacity there.

- **Experience with technology and the role of the Internet in growing transportation use, including among low-income and rural communities.** Heather Menninger’s leadership of the Inland Southern California One-Call/One-Click Veterans Transportation Initiative, with an expanded role for the 2-1-1 organization is one communication model relevant to specialized transportation resources. For the Fresno Coordinated Plan, Heather Menninger and Cliff Chambers developed prioritized strategies for a “Find-A-Ride” website, that would combine both public transportation and human transportation resources into a single website.

About Ventura County’s Challenges and Opportunities

While VCTC has as its organizing mission “Moving Ventura”, the multiplicity of transit operating agencies and services that exist make it difficult for consumers to navigate and to determine “how to get there from here.” This can become even more complicated for the target groups of this Coordinated Plan – older adults, persons with disabilities and persons of low-income. The recent Short Range Transit Plan (SRTTP) and other regional planning efforts recognize the need for a more coordinated, connected transit system and the difficulties in realizing that.



Ventura County’s public transportation services range from Gold Coast Transit Joint Powers Authority to the Ojai Trolley in scope and complexity. Ventura County Transportation Commission continues to provide the VCTC Intercity Bus services, as well as the Heritage Valley coordinated service, while a number of local services operate within the County’s cities. The new East County Transit Alliance Area – comprised of Moorpark, Simi Valley, Thousand Oaks, Camarillo, and nearby, unincorporated areas – seeks to improve cooperation and coordination. And yet, differences between services in operating hours, days and fares with potentially difficult connections, though improved, reflect the distance still to travel towards a coordinated, truly integrated service.

The recent Ventura County SRTTP identifies a countywide goal of “**development of a more customer-focused, coordinated and consolidated transit system in Ventura County**”, recognizing that progress toward this goal has been made through a number of different forums, including the creation of the Gold Coast Transit District, the Heritage Valley Transit Service Cooperative Committee and the East County Transit Alliance. This Coordinated Plan 2016 Revision then will help to operationalize that goal in



relation to its particular constituencies: older adults, persons with disabilities and persons of low-income, including continuing education to these groups in recognizing the County’s current funding limitations as a county without a self-help sales tax, and the resultant service limits of the current system.



About Our Proposal

Ventura County needs a *Coordinated Public Transit-Human Services Transportation Plan 2016 Revision* that is of excellent quality and supports both County and regional mobility goals. It should build upon the comprehensive, coordinated and multimodal planning processes that were recently developed in the May 2015 Ventura County SRTP and the August 2013 *Ventura County Comprehensive Transportation Plan*.

A hallmark of the AMMA team’s Coordinated Plan process utilized by AMMA team is to utilize the findings and recommendations of these plans to: 1) inform the public outreach process; 2) document the needs of the target populations through the demographic analysis and public meetings; and 3) utilize the outreach and survey process to craft prioritized goals, strategies and projects that builds the capacity of both human service and public transportation resources to further the successful progress of improved mobility choices for the target populations. In particular, this process was successfully employed in the AMMA Team’s efforts in Imperial County and for Los Angeles Metro led by Heather Menninger with Cliff Chambers.

The Coordinated Plan also helps to further regional mobility goals. SCAG’s *2012-2035 Regional Transportation Plan/ Sustainable Communities Strategy* further articulates both a vision and policies that will impact the mobility of Ventura County residents and in particular its older adults, persons with disabilities and persons of low income, important given these groups’ need to travel between counties as well as within Ventura County.

The central challenge of this Coordinated Plan Update is to prepare a plan that will fully comply with FTA Circular 9070.1G and will provide sufficient flexibility for the future given the unknowns around the Fixing Surface Transportation Act (FAST Act). As stated in the RFQ, the current guidance for the Coordinated Plan process is still based on MAP-21 regulation. The significant change introduced by MAP-21 that relates to the Coordinated Plan is that projects funded with 5310 dollars are “**projects in the Coordinated Plan,**” not simply derived from it as had been the case under SAFETEA-LU direction. This makes all the more important the public involvement. It critical to ensure that a breadth of voices provides input to the Coordinated Plan and that identified projects are as comprehensive as possible, in anticipation of future grant cycles and to build responsive coordinated projects.

With regard to *how* projects are included in the Coordinated Plan, recent regulatory guidance says:



“FTA maintains flexibility in how projects appear in the coordinated plan. Projects may be identified as strategies, activities and/or specific projects addressing an identified service gap or transportation coordination objective articulated and prioritized within the plan.”

(FTA Circular 9070.1G, pp. V-1)

Indicating also that projects are “developed and approved through a process that include[s] participation by older adults, individuals with disabilities, representatives of public, private, and nonprofit transportation and human service providers and other members of the general public,” this Coordinated Plan development process is designed to ensure public involvement opportunities that guide the developments of strategies and projects. As noted, a hallmark of the AMMA team approach is develop a comprehensive array of goals, strategies, and illustrative projects that provide sufficiently large “buckets” for future 5310 applicants to access for a wide range of projects that address both mobility and information gaps.

And it is equally important to communicate within the various public forums within which the plan development process takes place that there are very real constraints on the County’s transportation “purse.” For example, continuing reductions in the gasoline sales tax as a result of more fuel-efficient vehicles have reduced some state-revenue streams to the county.

The AMMA Transit Planning team has structured a work plan that is responsive to Federal requirements, and addresses the work elements that VCTC desires. Our approach anticipates three phases:

- Phase 1 – Review of existing conditions and outreach to identify mobility needs;
- Phase 2 – Strategies identification and prioritization, development of first draft plan;
- Phase 3 – Final plan preparation and presentation

The Coordinated Plan provides a unique opportunity to identify and enumerate mobility needs of the target groups of older adults and persons with disabilities, with some attention to persons of low-income and to military veterans. This catalogue of needs leads importantly to *the identification of strategies and projects by which to address these needs*. The Coordinated Plan approach that we propose will result in a strategic framework of responses, with prioritized strategies that will improve mobility for the Coordinated Plan’s target groups. The Coordinated Plan is also an opportunity to educate and inform numerous audiences about the limits to Ventura County’s transportation network within its current funding envelopes.

The audiences of this Coordinated Plan are multiple. They include the **transit professionals and VCTC staff** who will be guiding the FTA Section 5310 program over the next four to five years or until new FAST regulation shift the focus. They include the **human service agency stakeholders** whose consumers are the focus of the Coordinated Plan and many of who also manage transportation programs. They include **consumers** themselves, some of whom are advocates on behalf of those without voices in various transportation planning processes. Audiences include as well the various **public transportation**



agencies in Ventura County who work to provide important community-based transportation services, supplementing VCTC’s regional transportation program.

Finally, a key Coordinated Plan audience includes the **policy makers** of Ventura County who make a multitude of decisions that impact the mobility of older adults, persons with disabilities and persons of limited means. Policy decisions about service modes and resources, facility location, land use and planning, Active Transportation and non-motorized transportation support, to name just a few topical areas, can be informed by a high quality *Coordinated Public Transit-Human Services Transportation Plan 2016 Revision*.

Our team and the Coordinated Plan approach described here seeks to embrace all of these factors and, drawing upon our considerable experience, to produce a useful document that is valuable to its many audiences of interest in Ventura County.



Scope of Services

Phase I – Review of Existing Conditions and Outreach to Identify Mobility Needs

Task 1 - Project Kick-off

Following the Notice to Proceed and/or the executed contract, we will schedule a face-to-face meeting between the AMMA team and VCTC staff, as well as any key stakeholders whom VCTC may choose to involve. This could be scheduled in conjunction with – but prior to – a regularly CTAC/SSTAC and/or the TRANSCOM/ Ad Hoc Committee in order to jumpstart the process and get early input from VCTC’s committee members.

The agenda for the Kick-off meeting will include, but is not limited to:

- Discussion of key background issues and concerns of the VCTC organization
- Review of the proposed Scope of Services
- Review of the proposed schedule and various external dates/ timeframes with which to coordinate.
- Discussion of outreach activities and requirements: status of stakeholder list; review of potential venues; review of promotion activities.
- Review and settling upon the background documents to review for the Plan.

If the Kick-Off is held at the time of other regularly scheduled meetings, the AMMA team will prepare a short presentation identifying the purposes of the Coordinated Plan, the opportunities for input – including immediate needs around updating the Stakeholder list and the anticipated schedule.

Task 1 Deliverable: Subsequent to the kick-off meeting, a formal memorandum will be prepared describing modifications to the Scope or Schedule and other pertinent information that was agreed upon at the meeting.

Task 2 – Existing Conditions and Assessment of Available Services

Task 2.1 Review of relevant reports and legislation

Both to inform the Coordinated Plan Revision and to ensure that it recognizes work already done within Ventura County, the AMMA team will review key studies and reports, including the *Ventura County Comprehensive Transportation Plan*. The recent *Ventura County Short Range Transit Plan (SRTP)* provides excellent summaries of key documents but this effort will seek to isolate findings of relevance to the mobility of the Coordinated Plan’s target groups. We will go over with VCTC staff what documents may be added to the SRTP list, potentially including some human service agency strategic planning documents such as the Area Agency on Aging 5-Year Plan or any long-range plan of the 2-1-1 organization.



This subtask provides for a review of goals from the 2007 Coordinated Public Transit-Human Services Transportation Plan and the 2012 Update with discussion of progress towards the goals and objectives these identify. Included as well will be a summary of Ventura County report to the legislature, in response to SB 716, which articulated the consensus of Ventura County leadership to move towards a more coordinated, customer focused system of transportation services.

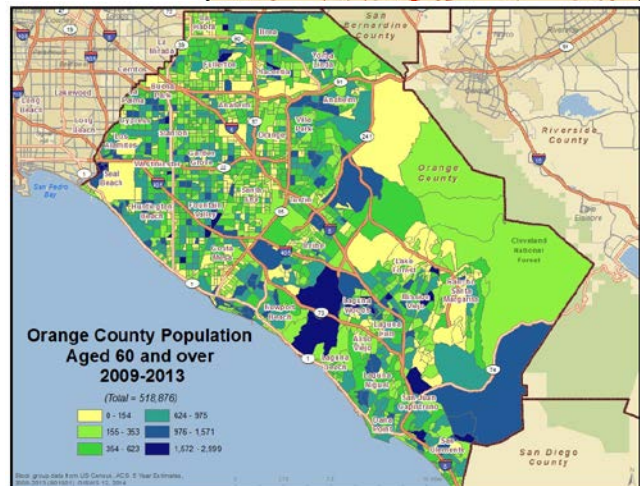
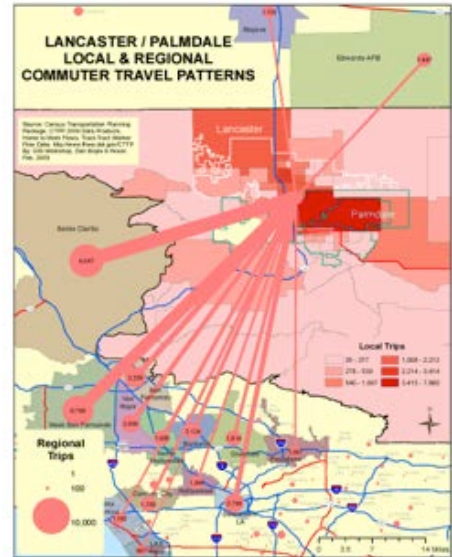
The Federal Transit Administration Section 5310 regulatory purposes and intent will be highlighted as well, likely included in the introductory language of this 2016 Coordinated Plan Revision.

Task 2.2 Demographics analysis of target populations

Although Ventura County is not growing at the rate of the Inland Southern California counties, it is still growing and within that growth are significant increases in key groups, specifically older Ventura County residents. This subtask will report through narration, tables, and mapping on current status and trends in relation to the following:

- Population sizes, changes, and densities of the older adults, persons with disabilities and persons of low-income within Ventura County;
- Population and employment Ventura County projections;
- Current employment densities within Ventura County;
- Relevant maps from SCAG’s Regional Transportation Plan and other sources to further describe Ventura County’s mobility issues.

For maps made by AMMA team member GIS Workshop, if the transit providers’ current shape files are available, these layers can be overlaid onto other mapped variables. We have not budgeted for the mapping of the providers’ transit service networks. Some data will be presented at the countywide level and some at the UZA level to help support the decision-making processes regarding Section 5310 allocations to Large UZAs versus the Caltrans’ small UZA competitive process.





Task 2.3 Inventory of existing transportation services

Important to the statutory direction for Coordinated Plans is the assessment of the current transportation services. Ventura County’s SRTP does much to document the status of the County’s public transportation network. This subtask will reiterate that information – updating ridership information and other operating characteristics as necessary – and will seek to secure comparable information from the readily identified human service transportation providers in the County, specifically Section 5310, 5316 and 5316-funded projects. Task 3.1 following describes a survey process used to secure additional vehicle and agency transportation information.

In narrative and tabular forms, the inventory product of this subtask will document the services by community – or by mode – that are available to the Coordinated Plan’s target groups. As noted, the SRTP will be a primary source for that documentation, in conjunction with the Task 3.1 survey.

An important by-product of the AMMA team’s inventory will be to compile a comprehensive total of trips provided – inclusive of specialized transportation services publicly funded in Ventura County. This will enable reporting on *trips per capita* to establish a 2016 benchmark. SCAG has indicated that its annual regional goal is 34 trips per capita, that for every resident in the region at least 34 public transit and rail trips were taken each year. Los Angeles County is well above that at almost 70 trips per capita during FY 2014 while inland Riverside and San Bernardino Counties are in the single digits. SCAG has reported Ventura County at 6.5 transit trips per capita. This report will validate and make that current, inclusive of identified specialized transportation resources.

Task 2 Deliverables:

- Review of key studies and legislation, reporting on findings of relevance;
- Compilation of demographic information, identifying patterns and trends;
- Preparing the inventory framework, and initiating its content, from which to assess available transportation services.
- Preparation of Report of Findings: Existing Conditions and Assessment of Resources

Dennis Brooks will have lead responsibility for the Existing Conditions report, including the Inventory and for the demographics analysis with GIS support provided by John Johnson.

Task 3 – An Assessment of Transportation Needs

Task 3.1 Develop and administer stakeholder survey

This subtask provides some quantitative input to the Coordinated Plan in terms of both resources and needs. That is useful to compliment the qualitative information brought back from the public outreach.

A precursor to the survey effort will be the updating of the stakeholder list. The AMMA team uses a number of resources to do this. An important starting place will be to ensure that the VCTC stakeholder



listing includes current information for all of the stakeholders contacted as part of the 2014 Unmet Transit Needs definitions review. Using a variety of sources, including the California Highway Patrol terminal yard inspection lists and other publicly available lists, we will augment the VCTC stakeholder listing.

The AMMA team will prepare a survey of no more than two-pages to capture:

- 1) **agency-perceived mobility needs** represented to agency staff, case workers and line personnel by their clientele;
- 2) **agency transportation resources** and features, including simple service descriptions.

The survey is designed for both public transit agency input and human service stakeholder input. It is difficult to do both in a short survey of this type but we have nonetheless been able to develop useful information regarding the perception of needs and to break these apart by market segment or provider type, e.g. public transit provider versus human service agency provider.

The survey will be prepared in paper and electronic form and similarly distributed – to physical addresses and an e-survey link to available email addresses. The general format, survey design and structure aims to be answerable by one person within the agency. Although this isn't always possible, the more hands the survey has to go through, the less likely it is that it will be completed.

A final element of this subtask is the development of a cover letter, to explain the intent of both the survey and the Coordinated Plan Revision. Strong and compelling language will be used to encourage response. We anticipate encouraging the CTAC/ SSTAC and the TRANSOM/Human Services Ad Hoc Committee members to assist in survey distribution – both to complete it themselves and pass it on to key constituents.

Heather Menninger will lead the survey design, with input from team members and the final version to be approved by the VCTC Project Officer. AMMA's Dennis Brooks will oversee the development of the E-survey tools, for on-line distribution.

The image shows a survey form titled "Agency Survey" for the "2016-2019 Coordinated Public Transit-Human Services Transportation Plan for Los Angeles County". The form is divided into several sections:

- Contact Information:** Fields for Agency Name, Program, Mailing Address, City, State, Zip, Telephone, Fax, and E-Mail.
- Agency Type:** A section where respondents check boxes for "Public Agency, transit only", "Public Agency, all others", "Private, non-profit, faith based", and "Private, non-profit, all others".
- Your Clients and Their Information Needs:** A section with multiple-choice questions about client demographics (e.g., "Estimated # Total clients / consumers provided or on caseload lists") and agency assistance (e.g., "How does your agency assist consumers with transportation information?").
- Transportation Subsidies:** A section where respondents check boxes for various subsidy types such as "Purchasing transit passes, tickets for clients", "Purchasing taxi vouchers for clients", "Reimbursing clients for mileage", "Providing clients with gas cards", "Subsidizing travel training", and "Subsidizing travel related escorts".
- Agency Type (Check one only):** A section with radio buttons for "Public Agency, transit only", "Public Agency, all others", "Private, non-profit, faith based", and "Private, non-profit, all others".
- Approximately How Much Do You Spend Annually on Each Type of Subsidy?** A table with columns for "Transit Passes or Tickets", "Taxi Vouchers", "Mileage Reimbursement", "Gas Cards", "Travel Training", "Travel Related Escorts", and "Other".



Task 3.2 Conduct Public Workshop and Consumer Focus Group Meetings

The RFP has proposed two public forums and three focus groups by which to provide input to this Coordinated Plan. The AMMA team proposes some modification to that, based upon our experience in securing meaningful input to the Coordinated Plan process and in complying with Title VI requirements to involve the limited English Speaking populations in meaningful ways in the planning process. We therefore propose the following:

1) Two to Three Agency Stakeholder Workshops –

- We will schedule and recruit stakeholder representatives to two formal workshops of 90 to 120 minutes, planning for 15 to 25 participants per location.
- We will identify a third workshop/ meeting opportunity with a standing group, such as the Ventura County Together organization, working with their meeting schedule to allow for discussion of priority mobility needs and concerns.

2) Up to Four Consumer Focus Groups -

- We will work with agency representatives to secure up to four locations for consumer discussions regarding mobility needs, working with agency contacts to recruit participants to these focus groups of 8 to 12 persons per session, anticipating that at least one would involve Spanish translation and be 60 to 90 minutes in length.

Seeking solid “sponsor organizations” and access to their venues will be a focus of our team’s outreach approach. In conjunction with VCTC staff, we will identify community contacts from among VCTC’s CTAC/SSTAC and TRANSCOM through whom to 1) identify venues; 2) to identify and invite participation from **human service agency personnel** in the surrounding communities and 3) to recruit **representative community members** who are older adults, persons with disabilities or persons of limited means.

We have a number of tested recruitment strategies for both consumer representatives and agency personnel and expect to use them all to achieve solid turnout for both meeting types. For consumers, we have budgeted \$5 Starbucks/ Carl’s Junior gift cards to aide in the recruitment process. An inviting, well-designed flyer announcing the

Voice Your Transportation Concerns!

This is *your opportunity* to help update the Riverside County Public Transit - Human Services Transportation Coordination Plan

Help us identify transportation needs and contribute to Riverside County's transportation planning efforts for the next decade.

Join Riverside County Transportation Commission to share your transportation concerns:

- Gaps in service
- Unmet transportation needs within Riverside County
- Mobility needs of older adults, people with disabilities, and persons of low-income

Coordinated Plan Update Workshops

Blythe January 11, 2012 - Wednesday, 10 am – 12 pm City of Blythe Council Chambers 235 N. Broadway, Blythe, CA 92225	Riverside January 19, 2012 - Thursday, 10 am – 12 pm Orange Terrace Community Center - Grand Ballroom 2002 Orange Terrace Parkway, Riverside, CA 92508
Palm Desert January 11, 2012 - Wednesday, 2:30 pm – 4:30 pm Parkview Building, Conference Room 119 73-710 Fred Waring Drive, Palm Desert, CA 92260	Wildomar January 19, 2012 - Thursday, 2 pm – 4 pm Wildomar Senior Assisted Living Community 32365 S. Pasadena Street, Wildomar, CA 92595

Invited Participants: Public Transit Riders, Representatives for Social and Human Service Agencies, Community-Based Transportation Providers, Public Transit Agencies, General Public.

Aren't able to attend one of these meetings?
Your comments about transportation needs can be emailed to: PlanUpdate@hotmail.com until February 15, 2012

For additional information, please call: (951) 787-7141 | RCTC - Josefa Cienfuegos, or (951) 784-1355 | AMMA Transit Planning - Heather Alvinger

Interested in Improving Public Transit?

Public Transit – Human Services Transportation Coordination Plan for San Bernardino County 2016 Update

Governments **SANBAG** Working Together

The Coordination Plan addresses mobility gaps for persons with disabilities, persons of low-income, and older adults.

Join us for one of our STAKEHOLDER WORKSHOPS to tell us about the transportation needs of your clients and help develop responsive projects:

Tuesday, February 2, 2016 3:00 – 4:30 pm Foothill Aids Project 670 N. Arrowhead Ave, Suite A. San Bernardino, CA 92401	Wednesday, February 24, 2016 10:30 am – 12:00 pm Inland Empire United Way 9644 Hermosa Avenue Rancho Cucamonga, CA 91730 Please park only in United Way marked parking spots
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Invited Audiences: Social & Human Services Agencies + Public Agencies + Non-Profit Agencies

For questions or to request special accommodations, contact: AMMA Transit Planning – (951) 784-1355 or Nancy Strickert, SANBAG – (909) 884-8276 | nstricker@sanbag.ca.gov





Community Meetings will be provided to stakeholder agencies ahead of time to encourage participation at those workshops.

Task 3.3 Document and Identify Unmet Needs and Gaps in Service

VCTC has a long history of taking unmet transit needs testimony in compliance with California Transportation Development Act (TDA) requirements. The work in Ventura County in 2013 to revisit the unmet needs definitions and to bring these current has presumably resulted in some change in how needs are reported and in what constitutes an unmet transit needs. An element of this subtask will be to compile and report on the unmet needs testimony from the most recent cycles, presumably the last two years of testimony and potentially including this FY 2015/2016 cycle. The unmet transit needs testimony was a significant input to the 2012 Coordinated Plan update, particularly undergirding its recommendations with regarding to fixed-route transit services within the County and gaps associated with these.

This subtask will also bring together the outreach findings with the findings from the stakeholder survey to identify and describe gaps in service. The product of this task will be in narrative form, with accompanying tables and graphs from the survey process, to identify both the themes that run through these findings and specific detail. This could relate to inter-community corridors of service where improved connectivity is still needed. These could involve service span or days of operation where work or school trips may fall outside of the current operating envelope. They are likely to involve some level of capital replacement, to continue to modernize and replace human service agency vehicles at appropriate times. Findings may also address the built-environment and the difficulties that consumers have with paths-of-access, bus stop accessibility and the safety or general experience of being a pedestrian or bicyclist in Ventura County.

Task 3 Deliverables/ Products:

- Agency stakeholder listing expanded and/or updated
- Draft and final agency survey
- Distribution of agency survey via email and surface mail
- Stakeholder workshop venues identified and secured; flyers prepared and distributed to promote workshops; some recruitment to workshops
- Up to 3 stakeholder workshops conducted, seeking 15 to 25 participants at each.
- Consumer focus group opportunities identified and secured; flyers prepared and distributed to invite participants to focus groups, relying upon agency assistance to secure participation of up 8 to 12 persons at each of 4 focus groups including at least one with Spanish translation.
- Review of two cycles of unmet transit needs documentation
- Preparation of Report of Findings: Assessment of Mobility Needs and Gaps

All team members will participate in Task 3 activities, the significant primary research effort of this Coordinated Plan development. Dennis Brooks has lead responsibility for the survey effort. Heather



Menninger and Valerie Mackintosh will undertake the various public involvement activities, with support from other team members. Valerie Mackintosh will prepare the analysis of TDA unmet needs testimony. All team members will assist with the Report of Findings.

Phase II – Strategies Responsive to Mobility Needs Identified and Prioritized

Task 4 – Strategies, Activities and/or Projects to Address Identified Gaps

Development of strategies by subarea, market group, service type, and trip type.

The strategies and projects proposed will be developed in tabular, matrix and narrative form to address the diverse needs of different areas of Ventura County and the different market segment and service type considered through the outreach and survey activities.

Opportunities for coordination could also be considered by proposing policies and incentives for utilizing fixed route service whenever feasible. Coordination plan strategies that “maintain and strategically expand fixed route services to increase mobility options when financially feasible” often can have the biggest impact on increasing mobility options for the target populations. For example, the 2015 Countywide SRTP identified service gaps for infrequent and indirect transit service between Simi Valley and Moorpark College. When financially feasible, closing this service gap would be extremely beneficial in offering low income workers, students, and disabled individuals mobility options they currently don’t have today. This is consistent with the 2012 Coordinated Plan Update for Goal 2, Transit Capacity Building, and Implementing Objective 2.1, Expanding Fixed Route service.

Mobility gaps for transportation disadvantaged populations can vary extensively by market group and trip type. There may be ways in which to tease out the survey data, as well as to present the outreach findings that help point to particular strategies. In the 2012 Coordinated Plan, a common theme was on the need for more transit and better connections between cities and communities in Ventura County, but also inter-county connections. In the 2015 SRTP, service connectivity and transit investment to improve connectivity was a significant emphasis of the SRTP. The Coordinated Plan will build on this work to support transit investment that addresses transit connectivity for the target populations.

Another important outreach theme from the 2012 Coordinated Plan update was defining appropriate ways to provide individualized information and rider assistance. This will continue to be important in enabling older adults, persons with disabilities and persons of low-income to utilize existing public transportation and to access available specialized transportation. VCTC now has NextBus real time information for fixed routes buses and access is provided with the 511 trip planner. The outreach effort will determine how seniors, disabled individuals, and low income persons are getting the information they need, particularly those without smart phones. The outreach efforts will explore how individuals who need specialized transportation get information on needed transportation services from human service agencies. In recent Coordinated Plan development processes, we have been able to identify *specific* information gaps and develop *specific* strategies and projects to address these gaps. This will be an important area of exploration in the Ventura Coordinated Plan 2016 revision.



An important and significant part of FTA 5310 funding in the past has been for the replacement and expansion of vehicles for human service agencies. The inventory and survey conducted for this project will identify the vehicle procurement needs from human service agencies in Ventura County. Strategies and projects will be developed that meet this important component of FTA 5310 funding.

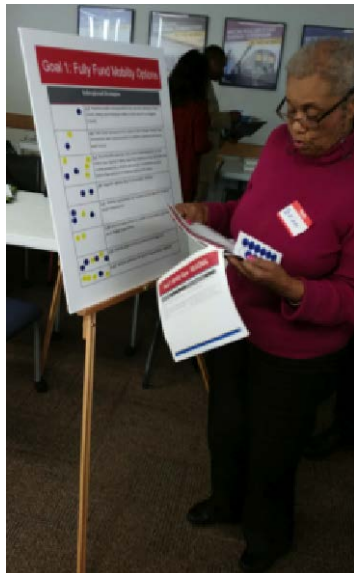
As the population continues to age, the increased need for door-through-door transportation has been a common theme of other Coordinated Plans on which the AMMA team has recently worked. While it is not known whether or not this will be a theme in 2016 in Ventura County, the AMMA team will listen to stakeholders and consumers on how human service agencies are addressing this important need. The AMMA team has helped other counties provide the necessary strategy “bucket” for consideration if a future FTA 5310 applicant wants to submit an application for such augmented service delivery.

Task 4 Deliverable/ Products:

A matrix will be prepared of Coordination Plan Update alternative policies, strategies and actions, potentially presented by market group to the extent that collected information allows and supporting narrative to describe these strategies.

Mobility Planners’ Cliff Chambers will have lead responsibility for this task, assisted by other team members.

Task 5 – Priorities for Implementation



At this stage, as through its overall development, the Coordinated Plan wants to promote and further large VCTC agency goals, including its mission “Moving Ventura County.” This task’s intent is to define the priorities for that in terms of the target groups of older adults, persons with disabilities and persons of low income.

Input from Task 4’s strategy identification, coupled with all the other previous tasks, will have been used to define the mobility gaps and the continuum of needs that individuals have in accessing needed services, employment and education. In order to prioritize these, the AMMA team proposes to use the two late-project public meetings as prioritization workshops and as part of the draft plan review called for in VCTC’s RFQ. Importantly, AMMA’s approach serves to comply with Circular 9070.1G regulatory guidance to utilize stakeholder input in order to prioritize the identified strategies and to seek comment upon the proposed Coordinated Plan update framework.

We will schedule two workshops in east and west county venues to invite participation around the prioritizing of strategies. Stakeholders from earlier in the plan development process will be invited back, as well as the CTAC/SSTAC and TRANSCOM participants. Invitees will consist of both transportation



providers and social service agency representatives that work directly with transportation disadvantaged populations. AMMA team members will work to recruit representative participation in these sessions, through email and telephone contacts.

The facilitated workshops will utilize the outcomes of previous tasks and input from the stakeholders to determine which policies and actions could have “high impact,” “medium impact”, and “low impact” in addressing the mobility needs or identified mobility gaps or barriers. By high impact, we will mean the “biggest bang for the buck” in filling mobility gaps in the most cost effective manner as possible. These interactive workshops invite participation around the process of determining project priority.

Prepared in advance of the workshop will be the strategies’ descriptions – fairly high level summaries of the strategies that have surfaced through the Plan development efforts to be considered in relation to responsible parties, time frames for implementation and obstacles or other issues impacting implementation.

This document will be coupled with the Existing Conditions and Mobility Needs assessment reports of Tasks 2, 3 and 4 to comprise the first draft Coordinated Plan, presented for review and prioritization discussion in the context of these workshops. A power point that summarizes this first draft plan, the findings that lead to its development and the resultant, proposed strategies will be prepared.

Task 5 Deliverable/ Products

- Initial strategies descriptions for use in the workshops
- First Draft Final Coordinated Plan
- Schedule and conduct of two stakeholder Prioritization Workshops
- Revised matrix of Goals, Objectives, Strategies and Projects to reflect key stakeholder input

Project team members will each contribute to the first draft Coordinated Plan document. Project principals, Heather Menninger and Cliff Chambers, will lead the prioritization workshops, working with invited stakeholders to draw out project possibilities and explore new coordinated partnerships.

Phase III Final Plan Preparation and Presentation

Task 6 – Compile Final Report and Presentations

This task provides for developing the second draft plan document, towards preparation of the Final Coordinated Plan Revision and its presentation to the CTAC/SSTAC, TransCOM/ Human Services Ad Hoc Committee and ultimately to the VCTC Commissioners.



Following the prioritization workshops, the initial draft plan document will be reviewed with VCTC staff to identify necessary revisions and modifications made and to discuss the prioritization rankings. The second draft document will be prepared for distribution, including an Executive Summary.

At this point, presentations of the draft final plan can be made to VCTC's two committees: CTAC/SSTAC, TransCOM/Human Services Ad Hoc Committee. Any revisions that are identified through these presentations will be addressed, to construct the final Coordinated Plan document. The AMMA team will work with VCTC staff to determine where to post the second draft Coordinated Plan document in order to invite review and comment by the general public. The required 25 hard copies plus an electronic copy of the Final Plan will be prepared and provided to the VCTC Project Manager.

A presentation to the VCTC Board of Commissioners can be scheduled.

Task 6 Deliverables/Products

- Review meeting with VCTC staff to discuss the prioritization findings and areas of revision to the first draft document
- Second draft Coordinated Plan document
- Presentations to the CTAC/SSTAC and to the TransCOM/Human Services Ad Hoc Committee
- Final Coordinated Plan Revision document and required copies
- Presentation to the VCTC Board of Commissioners

Heather Menninger will have primary responsibility for this task, with assistance anticipated from Cliff Chambers in relation to changes of substance and AMMA support team in relation to production of the final document.



Qualifications

Introduction to AMMA Transit Planning



AMMA Transit Planning is the prime contractor for this offering and is highly qualified to bring its experience with public transportation planning to VCTC's Coordination Plan Update. Since 1987, Heather Menninger, AMMA's sole proprietor, has focused on community-level transportation service planning, including coordination with and connections to regional service, with particular expertise in Americans with Disabilities Act (ADA) complementary paratransit, in human service transportation coordination and in pedestrian accessibility.

Based in Riverside, CA. since 2009 and in Los Angeles County prior to that, AMMA's client base is largely in California, with some projects in Oregon, Arizona, Kansas and North Carolina. Within the region, AMMA has had continuing technical assistance contracts with San Bernardino Associated Governments since the early 1990's and with the Riverside County Transportation Commission since 2006.

Working with communities large and small, AMMA's strengths lie in identifying mobility needs of riders and non-riders – through nuanced public outreach processes – to then define the range of modes or service enhancements by which to meet these. AMMA's project experience cuts across modes and ranges from non-motorized pedestrian and bicycle mobility to bus-to-rail connections, fixed-route, ADA paratransit and demand response programs or vanpool programs. AMMA's consulting engagements have focused on the service planning and financial planning necessary for cost-effective service improvements that improve mobility of choice riders, recurring riders and those with special needs. A summary of AMMA Transit Planning consulting services follows:

■ **Technical Assistance, Grants Development and Procurement Support**

Having worked with multiple transit, municipalities and planning agencies in urbanized, small urban or rural settings and with decades of diverse consulting engagements, AMMA is able to provide technical assistance around an array of transit operator needs. The AMMA team includes experienced planners, experts in contract language, procurement and operating practices, and skilled writers who specialize in grant development and grant writing. The AMMA team prepared nine Los Angeles County Active Transportation Program (ATP) Cycle II grants this spring, of which five were awarded funding in a highly competitive statewide process. Riverside and San Bernardino County small agency grantsmanship by AMMA team members secured 40 successful grants in FY 15/16 amounting to \$13.5 million, as well as individual projects in Imperial, Placer and Lake Counties. AMMA has authored three successful regional or statewide planning grants for SANBAG over its long tenure with that agency since 1990, including a Cycle I Veterans Transportation and Community Living Initiative (VTCLI) award resulting in VetLink.



Recent clients: San Bernardino Associated Governments and Riverside County Transportation Commission with 40 transit and human service providers in these two counties; Los Angeles Metro, Placer County Transportation Planning Agency, Imperial County Transportation Commission, Lake City/County Area Planning Council, Trinity County/ Trinity Transit, among others.

■ **Public Outreach, Title VI Reporting and Customer Service Evaluations**

AMMA team members often move people through complex and difficult decision-making processes to reach consensus and to improve access and mobility. In many AMMA projects, public engagement and public input is critical to building solid project direction and responsive strategies. AMMA utilizes a range of strategies to invite public input, and educate and engage riders and stakeholders in order to provide useful feedback to transit agencies. AMMA, as Caltrans’ contractor, provided Title VI technical assistance to operators with less than 50 vehicles, which included assisting dozens of small transit providers in defining effective public outreach to limited English proficient and minority populations to ensure development of compliant Title VI programs. **Recent clients: Caltrans- RTAP Program and multiple transit providers through that; San Bernardino Associated Governments, Riverside County Transportation Commission, Lake County Area Planning Council, Orange County Transportation Authority, City of El Monte, Morongo Basin Transit Authority.**

■ **Short Range Transit Plans and Integrated Service Planning**

AMMA team members have conducted full-scale short-range transit plans and developed financial plans to provide four-to-seven year planning documents to guide transit operations. Bus-to-rail coordination planning has been the focus of four Orange County *Go Local* studies and recent projects in Riverside County supporting the Coachella Rail planning processes. **Recent clients: Riverside County Transportation Commission, City of Visalia, City of Needles, Imperial County Transportation Commission, Cities of Claremont, Gardena, Montebello, Norwalk, Whittier; Placer County Consolidated Transportation Services Agency (CTSA), Morongo Basin Transit Authority, Cities of Laguna Woods, Mission Viejo; Tri- Cities of San Clemente, Dana Point, Laguna Beach.**

■ **Paratransit Service Evaluation, Americans with Disabilities Act (ADA) Compliance**

Ms. Menninger brings strong analytic skills and experience from dozens of paratransit operations settings to the evaluation of paratransit programs over twenty-five years. Evaluation entails functional analyses, field and dispatch observation, assessment of operating data, rider surveys, review or construct of operations contracts, including penalties and incentives and development of operational policies and procedures. **Recent clients: Placer County Transportation Planning Agency; El Dorado Transit; Greensboro and Fayetteville, North Carolina; Lawrence, Kansas; Cities of Santa Monica, Gardena, Whittier, Avalon.**



■ **Mobility Management and Coordinated Public Transit Human Services Transportation Plans**

This core area of expertise brings together AMMA’s background in human service transportation and pedestrian accessibility with traditional public transportation, as reflected in the co-authored 2013 Transit Cooperative Research Program Report 164, a veterans transportation toolkit. AMMA has prepared dozens of coordinated plans and updates in California, Arizona and Oregon. This involves defining and evaluating strategies to meet mobility needs of target populations, crafting a wide array of mobility management strategies. **Recent clients: Los Angeles Metro; Bay Area Metropolitan Transportation Commission; Flagstaff, Arizona; Orange County Transportation Authority; Rogue Valley, Oregon; Lake County/City Area Planning Council; Tuolumne Transportation Commission; Calaveras County Transportation Commission; Trinity and Imperial Counties; San Luis Obispo Council of Governments; San Bernardino Associated Governments, Ventura County.**

Please see www.AmmaTransitPlanning.com for further information.

Relevant, Sample Projects

1) 2016-2019 Coordinated Public Transit – Human Services Transportation Plan for Los Angeles County

Client: Los Angeles County Metropolitan Transportation Authority

Client: Los Angeles County Metropolitan Transportation Authority (Metro)

One Gateway Plaza, Mail Stop: 99-9-1
Los Angeles, CA 90012

Reference for AMMA Transit Planning:

Ashad Hamideh, Director of Countywide Planning
(213) 922-4299 HamidehA@metro.net



Project Description:

AMMA Transit Planning with Transit Marketing and Mobility Planners was responsible for updating Metro’s Public Transit – Human Services Transportation Coordination Plan to ensure compliance with requirements of the federal Moving Ahead for Progress in the 21st Century Act (MAP-21) and promote mobility for individuals with disabilities, older adults, and persons of low-income.

This project involved an intensive community engagement and public outreach process which involved participation by seniors, individuals with disabilities, people with low incomes, military veterans, other members of the public, and representatives of public, private, nonprofit





transportation and human service providers. It included review of relevant planning documents; analysis of population demographics of the Target Populations; development of travel demand projections through 2019; creating a more detailed inventory of transportation providers in Los Angeles County. The resultant five goals and thirty-eight priority strategies were subsequently prioritized for implementation through a public process, to address identified mobility needs and gaps for the Target Populations.

The five overarching goals are aimed at enhancing the mobility of the Target Populations. The implementation strategies supporting these goals were prioritized according to a three-step process that involved input from agency representatives. This extensive work ensures that Metro can certify that future Metro can also certify that projects selected for a funding award from the federal JARC, New Freedom, and Section 5310 programs are included in the 2016-2019 Coordinated Public Transit-Human Services Transportation Plan for Los Angeles County.

The Plan was unanimously adopted by the Metro Board of Directors, after accepting public comment from several dozen commenters. Board direction spoke to the intent of including the Coordinated Plan’s guidance in the Los Angeles County Long Range Plan.

Key Staff: AMMA Transit Planning was prime contractor; Transit Marketing and Mobility Planners were sub-contractors.

**2) Coordinated Public Transit-Human Services Transportation Coordination Plan, 2014
Development of a Short Range Transit Plan for Imperial County – Paratransit Services, 2011 –2012**

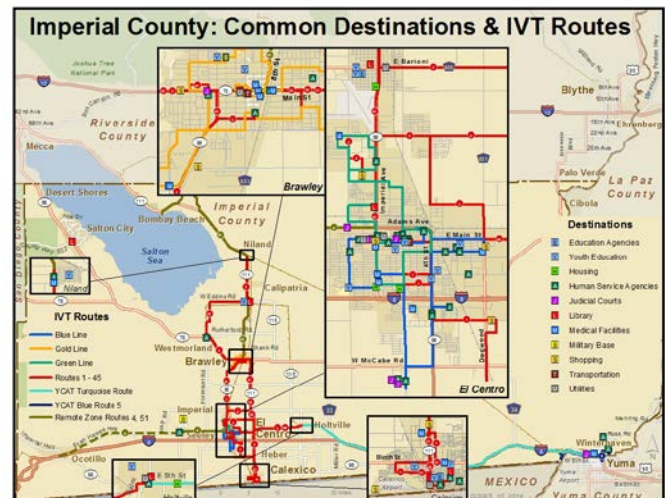
Client: Imperial County Transportation Commission (ICTC)
1405 N. Imperial Ave. Suite 1
El Centro, CA 92243



AMMA Transit Planning Reference:
Kathi Williams, Senior Transit Planner
(760) 592-4494 kathiwilliams@imperialctc.org

Project Description:

As prime contractor, AMMA was responsible for the development of the 2014 Public Transit-Human Services Coordinated Transportation Plan. Using a mix of qualitative and quantitative outreach activities, an extensive Market Research effort brought back mobility needs of three groups: older adults, persons of low-income and persons with disabilities. In this





region where more than one-third of the residents are of limited English proficiency and over 40 percent are from low-income households, there are substantial numbers of persons who are transportation disadvantaged.

The Coordinated Plan's five goals and seventeen strategies include three strategies that touch extensively on Active Transportation opportunities – around bus stop and path-of-access improvements, pedestrian improvements and integrated information portals that communicate about all modes of transportation, including paratransit and specialized transportation, bike-to-bus connections and other infrastructure improvements supporting the 5 million pedestrians that cross legally at the Calexico border annually. This Plan was favorably reviewed by the local newspaper, the IV Press, with both news story and an editorial on the importance of the Plan's findings and the roadmap its recommendations provided.

AMMA's Short Range Transit Plan Imperial County project was as subcontractor to AECOM. AMMA Transit Planning was the sub-consultant responsible for analysis of paratransit services within the Short Range Transit Plan for rural Imperial County. Imperial County, home of the Salton Sea, is one of California's border counties marked by its proximity to Mexico and its expansive desert. For the SRTP process, AMMA was responsible for the evaluation of seven individual services, including a paratransit system, inter-county medical transportation, and five city dial-a-ride services. This project involved extensive data collection and analysis efforts, including:

- Preparing service standards to guide the development of recommended alternatives
- Engaging local community for input on needs with regard to transit services
- Gathering operating and financial data regarding the current ICTC sponsored transit systems
- Evaluating the efficiency and adequacy of the current transit systems
- Developing a five year operating, capital and financial plan

Recommended direction anticipated some reduction of service in areas of the county with very low utilization but replacement there with alternative modes, including mileage reimbursement programs and vanpool/ rideshare programs that embrace mobility management strategies. Some expansion of fixed-route will move a productive but overtaxed demand responsive service towards better efficiency.

Key AMMA Staff:

As prime contractor for the Coordinated Plan: Heather Menninger, Dennis Brooks, Valerie Sedig, Ray Araujo and subconsultants: Selena Barlow- Transit Marketing; Cliff Chambers – Mobility Planners.

As AMMA subconsultant to AECOM for the SRTP: Heather Menninger, Dennis Brooks



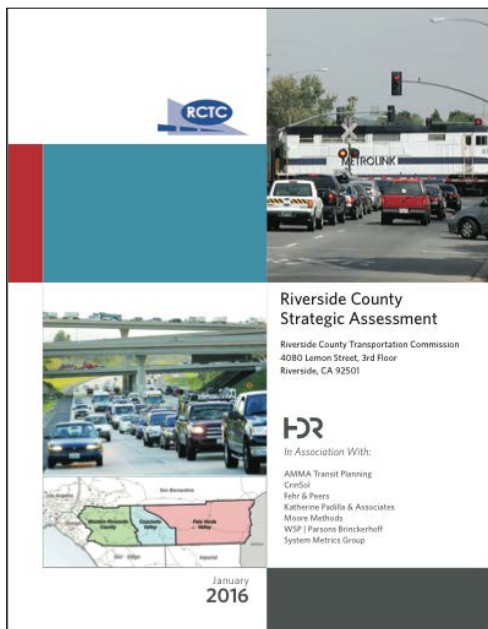
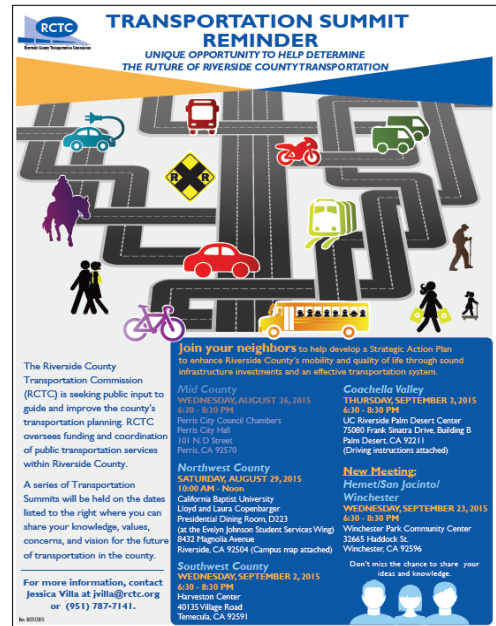
3) Strategic Assessment to Riverside County Transportation Commission (03/2015 to 12/2015)

Client: Riverside County Transportation Commission
4080 Lemon St.
Riverside, CA 92502

Reference for AMMA Transit Planning:
Robert Yates, Director of Multi-modal Services
(951) 787-7905 ryates@rctc.org

Project Description:

AMMA supported the HDR team in its conduct of a Strategic Transportation Assessment, with AMMA fully responsible for the bus and rail transportation-related elements of this twenty-seven-year assessment of mobility needs across the county, through the year 2040. Riverside County is a 7,200 square mile county with low-density large urban communities on its western edge, urbanized Palm Springs and Coachella Valley in the center and extensive rural expanses on its eastern border with Arizona. This Assessment’s purpose is to identify what deficiencies exist in the current transportation network and to help position Riverside County policy makers in preparing for a future sales tax ballot initiative. The Assessment will likely be used as an educational tool to help build voters’ understanding of future transportation funding needs.



AMMA inventoried and documented service by the seven public transit providers, preparing a countywide picture of existing transit services that include rail, fixed-route bus, paratransit and specialized transportation. A three-year history of providers’ operating and capital expense, ridership, revenue hours, revenue miles and key performance indicators was compiled. AMMA prepared a demand analysis for transit services through to 2040, using historical and regional trip-making data to construct a simple demand model. From this AMMA developed an assessment of deficiencies in the current network, using trips per capita indicators to suggest future transit service levels and by which to estimate revenue hours and the necessary capital and operating expenses by which to address these deficiencies.

As part of the Strategic Assessment process, AMMA team members participated in and led roundtable discussions at the Transportation Summit meetings held around the county. This qualitative input is



being used to help shape the priorities for future funding, to ensure that mobility concerns of residents across the county are incorporated into the long-range planning of the County Transportation Commission and its elected officials.

At its January 2016 RCTC Board annual retreat, the RCTC’s 34-member board of directors, an aggressive series of actions were adopted to move forward the Strategic Assessment’s findings and recommendations. Chief among these was the anticipation of placing a transportation sales tax measure onto the 2018 Riverside County election ballot to help fill the almost \$8 billion dollar shortfall in revenues that the Strategic Assessment projects between 2016 and 2040.

4) Flagstaff’s Coordinated Plan Business Plan

Client: Northern Arizona Intergovernmental Public Transportation Agency

3773 N. Kaspar Drive
Flagstaff, AZ 86004



Reference for AMMA Transit Planning:

Kathryn Chandler, formerly NAIPTA Mobility Manager
Currently Executive Director Northwest Valley Connect
(623) 282-9300 kchandler@northwestvalleyconnect.org

Project Description:

AMMA Transit Planning was responsible for preparing a Coordinated Business Plan to enable Flagstaff’s public transit provider, NAIPTA, and its city and regional partners to move forward in implementing its 2012 Coordinated Plan direction. With subcontractor Transit Marketing, this project involved an intensive community engagement and public outreach process, creating a more detailed Inventory, development of strategies and action steps, a five-year financial plan, job descriptions and revised by-laws for a new Coordination Council.



Several projects developed from this Business Plan were immediately implemented and including seeking and securing Mobility Management funds from the Arizona State Dept. of Transportation, establishing a new regional vanpool program and the development of various travel training and information-based tools to assist riders in finding the mode of transportation most



appropriate to them. Important among these were coordination projects with the Navajo Nation Transportation program and the Hopi Senom Transit focused on improved transfer opportunities within the City of Flagstaff for these regional Tribal transit programs.

Key Staff: *AMMA Transit Planning* was prime contractor, Heather Menninger and Dennis Brooks; *Transit Marketing* was sub-contractor, Selena Barlow with Pam Heller.

Introduction to Mobility Planners, LLC



Mobility Planners LLC was established in March 2011 by Cliff Chambers in order to offer the client the following advantages:

- The combined expertise of an alliance of highly experienced mobility planners, transit marketing, market research, public participation, and grant-writing professionals who collaborate regularly and well.
- Effective ongoing communication with you so as to be able to guarantee 100% satisfaction.
- Work done with integrity and the highest ethical standards.

Mobility Planners LLC is able to offer the client these advantages because of the culmination of Cliff Chambers' more than 25 years of experience in the transportation industry and the strong working relationships he has established with his colleagues and clients. Mr. Chambers the owner of Mobility Planners LLC is an expert in developing community-oriented transit services. Mr. Chambers has worked with over ten transit agencies to consider mobility management strategies as part of their family of services. Mobility managers seek to go beyond traditional public transportation services to fill mobility gaps.

Mobility Planners LLC offers a broad range of transportation consulting services including:

- Short Range Transit Plans
- Long Range Mobility Planning and Development
- Mobility Management Strategies
- Transportation Demand Management Plans
- Comprehensive Operations Analysis
- Grant Writing

More information on Mobility Planners LLC is available at: <http://www.mobilityplanners.com>



Relevant, Sample Projects

1) Fresno County Gap Analysis and Coordination Plan (2013-14)

Client: Fresno Area Express

2223 “G” Street, Fresno, CA 93706

Reference for Mobility Planners:

Jeff Long , FAX Project Manager

(559) 621-1436

Jeff.Long@fresno.gov

Peggy Arnest, Fresno Council of Governments

(559) 233-4148 ext. 241

parnest@fresnocog.org



Project Description:

Mobility Planners was contracted by FAX to conduct a countywide transit gap analysis, to quantify the needs of transportation disadvantaged populations and to update the County’s Coordinated Public Transit-Human Services Transportation Plan. To accomplish this, our team conducted an extensive, multi-faceted market research and outreach effort that provided both qualitative and quantitative data on which to develop actionable coordination strategies. Elements of the data collection effort included:

- Demographic analysis of Fresno County residents with focus on older adults, persons with disabilities and persons of low-income.
- In-depth personal interviews with 45 stakeholders representing 28 organizations that work with transportation disadvantaged populations. The interviews collected information about needs, gaps in service, subsidized fares and specialized services being provided.
- An e-survey of social service providers which collected information from more than 600 front line staff about the transportation habits and needs of their clients.
- An intercept survey of 573 individuals who are transportation disadvantaged due to age, disability or low-income.
- Focus groups with transportation disadvantaged populations including American Indian veterans, Spanish speaking adults from rural communities and low-income residents of target neighborhoods.
- Inventory of public transportation and human service agency transportation services.

The findings of the study were utilized to develop set of objectives and targeted strategies for closing transportation gaps and enhancing mobility for residents throughout Fresno County. A Mobility Enhancement Workshop brought together 30 key stakeholders who had provided input earlier in the process to preview and discuss the potential strategies which formed the core of the Coordinated Plan.

Project team: Cliff Chambers (Prime Contractor, Project Manager), Heather Menninger, Selena Barlow, Hugh Clark, Pam Heller, and Rick Kos



2) Calaveras Short Range Transit Plan (2014-2015)

Client: Calaveras Council of Governments

444 E. Saint Charles Street, Suite A, San Andreas, CA 952449

Reference for Mobility Planners:

Melissa Eads, Executive Director

meads@calacog.org

Amber Collins, Transit Planner

acollins@calacog.org

(209) 754-2094



Project Description:

Mobility Planners was contracted by the Calaveras Council of Governments to update a Short Range Transit Plan. The development of a service plan was to build on the mobility management strategies recommended in the 2014 Coordinated Public Transit-Human Service Transportation Plan prepared by AMMA Transit Planning. A key goal of that plan was to “establish a mobility management function to provide leadership and development that grow transportation capacity for target populations.”

A goal setting workshop with a combined meeting of the Calaveras Board of Supervisors and Angels Camp City Council built on the Coordinated Plan recommendation to increase frequencies along the spine route between Spring Valley and Angels Camp and provide innovative mobility management strategies to provide feeder service from the low density and low transit demand areas to the spine Route 1.

The resulting service plan included the following key mobility management elements that built on the Coordinated Plan recommendations:

1. Develop a spine fixed route between Demarest/49 in Angels Camp and Daphne St. in Valley Springs, with buses every hour between 7 am and 6 pm with 90 minute service on the shoulders starting at 5:30 am and ending at 8 pm on weekdays.
2. Provide flex route feeder services to spine Route 1 from Arnold, Rancho Calaveras, and the Sutter Creek Transit Center five days a week, every three hours between 7 am and 6 pm. Flex route requests for a pick-up or drop-off within ¼ mile of the feeder route would only be available to eligible ADA Paratransit individuals.
3. Provide five days a week general public Dial-Ride in Angels Camp for local Angels Camp travel, and as a feeder bus to and from the spine and feeder fixed route buses between 8 am and 4 pm. The Dial-a-Ride bus would also serve ADA Paratransit eligible individuals along the spine corridor and would operate 7 am to 8 am and 4 pm to 8 pm only if an ADA Paratransit eligible passenger requests a next day trip
4. Provide general public checkpoint Dial-a-Ride two or three days a week from the remote areas of Copperopolis, Mountain Ranch, Burson and West Point, depending on demonstrated demand.



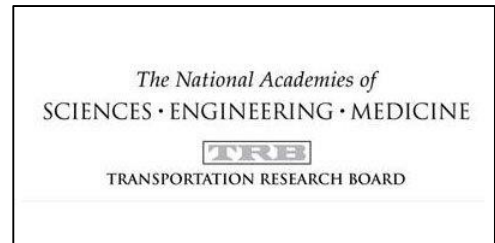
5. Provide intercity service between San Andreas, Rancho Calaveras and Stockton with two trips per day in each direction. Ideally, this would be expanded to three trips per day in each direction, but is currently not affordable in the five-year financial plan.
6. In partnership with the tourism industry, develop a fixed route service that provides alternatives to driving between hotels and tourist destinations.
7. Provide supplementary volunteer driver mileage reimbursement and taxi vouchers to eligible seniors and individuals with a disability in partnership with human service agencies.

A hallmark of the service plan is to match service methods and service levels to projected demand levels, a key ethos of the mobility management strategy. The Mobility Manager recommended in the SRTP was based on the Coordinated Plan recommendation and will help to provide necessary staff for partnership building, outreach and marketing of both traditional and non-traditional transit services.

Project team: Cliff Chambers (Prime Contractor, Project Manager), Selena Barlow, Hugh Clark, Pam Heller, and Rick Kos

3) Institutional Barriers to Intermodal Transportation Policies and Planning in Metropolitan Area (TCRP Report 14)

Client: Transit Cooperative Research Program,
Washington D.C.



Cliff Chambers while employed as a Principal with Crain & Associates, was the Principal Investigator for this national research project. An important goal of the research was to develop strategies to overcome barriers and achieve a national intermodal transportation system to improve surface transportation mobility. The research first looked at barriers to planning, decision-making, funding and operation for interconnectivity of multiple modes including highways, transit, bicycling and ridesharing. Action planning sessions in three regions were then conducted to better understand the institutional dynamics to overcome these barriers in a real world context. Strategies were developed to improve the institutional relationships necessary for cooperative coordinated approach to intermodal planning.



Key Team Members Qualifications and Responsibilities

Key staff members, their summarized qualifications and assigned responsibilities for this effort are introduced below. Appendix A presents the resumes for each individual.

Heather Menninger, Project Manager



Heather Menninger is Principal and sole proprietor of AMMA Transit Planning and will be the Project Manager for this work effort. Since 1987, AMMA has specialized in improving transit programs for the range of constituencies they serve, with a focus on transit service planning, particularly for paratransit operations and specialized transportation programs. Ms. Menninger’s background builds upon expertise in both public transportation and human services. After securing her B.A from Hampshire College, Amherst, MA. Ms. Menninger received a Master’s degree from Brandeis University focused on human service delivery to senior and persons with developmental disabilities. This early training is coupled with over 25 years of transit planning consulting and an Urban Planning degree from University of California Polytechnic at Pomona in 2003.

Ms. Menninger has managed AMMA’s portfolio of transit planning projects for municipalities, transit providers, counties and regions with work throughout California, in Oregon and Arizona, in Kansas and in North Carolina. Many projects been plans for rural counties, an area where she believe she brings particular expertise, as well as in paratransit service planning, the development of Coordinated Plans and small operator technical assistance. Ms. Menninger has undertaken several national projects, including the recent co-authorship of *Transit Cooperative Research Program (TCRP) Report 164 Community Tools to Improve Transportation Options for Veterans, Military Service Members and Their Families* and development of an AARP Rural Transportation Toolkit. She has authored four Transportation Research Record (TRR) journal articles including a 2014 TRR article documenting the costs and benefits of a travel-training program operated by a public transit provider, Riverside Transit Agency.

Project Role and Responsibilities: Ms. Menninger will be responsible for all aspects of the Plan development process and of the project draft and final reports. She will lead the various public meetings and workshops, assisted by Valerie Mackintosh for the public outreach efforts and by Cliff Chambers for the Prioritization Workshops. With the assistance of the full team, she will prepare the Plan products.

Cliff Chambers, Strategies Lead



Mr. Cliff Chambers is principal of Mobility Planners and has almost 30 years of experience in assisting communities to plan, coordinate, and fund mobility services for their residents. In January 2016, Mr. Chambers completed the Public Transit-Human Services Coordination Plan for Stanislaus County. Eight focus groups, six interviews with elected officials, an online survey of 100 human service agencies, and





two strategy prioritization workshops led to the development of four goals and twenty prioritized strategies for improving public transit and human service coordination in Stanislaus County.

Mr. Chambers was Project Manager for 2015 Fresno County Public Transportation Gap Analysis and Service Coordination Plan with AMMA Transit Planning as subcontractor. This included extensive market research, public outreach, and development of goals and prioritized strategies in Fresno County, including a Coordinated Public Transit-Human Services Coordination Plan.

As a subcontractor in 2014 to AMMA Transit Planning, Mr. Chambers was responsible for developing the recommended coordination strategies for the Coordinated Plan for the Imperial County Transportation Commission. These strategies were developed based on stakeholder interviews, community meetings, and meetings with the Social Services Transportation Advisory Committee. Mr. Chambers was the Project Manager for developing a Public Transit-Human Services Transportation Coordination Plan for six rural and urban subareas of San Bernardino County for SANBAG.

Mr. Chambers has worked with over ten transit agencies to consider mobility management strategies as part of their family of services. Mobility managers seek to go beyond traditional public transportation services to fill mobility gaps. He co-authored a Transit Cooperative Research Program research effort designed to develop strategies to assist local transportation agencies in becoming mobility manager (TCRP Report 21). Mr. Chambers was the Project Manager for another TCRP research effort on the best public transportation practices that address the mobility issues of transit dependent populations (TCRP Report 49). A compendium of brief summaries of the best public transportation practices that address immobility was prepared.

Mr. Chambers is an expert in developing community-oriented transit services. Mr. Chambers has recently prepared short range transit plans, transit needs assessments and comprehensive operations analyses for a wide variety of rural and small urban transit agencies including Merced Transit, Trinity Transit, Redding Area Bus Authority, Mendocino Transit Authority, Gold Country Stage in Nevada City/Grass Valley, Eastern Sierra Transit Authority, Yuba-Sutter Transit, Humboldt Transit Authority, and the cities of Tracy, Manteca, Menlo Park, Santa Maria, Visalia, Napa, South San Francisco, Folsom, Oroville, and Chico. He completed a high profile Short Range Transit Plan for the Yosemite Area Regional Transit System (YARTS).

Mr. Chambers received his Masters in City and Regional Planning from UC Berkeley in 1986. His academic emphasis was land use and transportation planning.

Project Role and Responsibilities: Mr. Chambers will participate in the community outreach activities, will have lead responsibility for development of the strategies and will, with Ms. Menninger, lead the Strategies Prioritization Workshops. He will contribute to development of the draft and final plans.



Valerie Mackintosh, Community Outreach Specialist



Valerie Mackintosh is a community outreach specialist and a writer. Ms. Mackintosh has been with AMMA Transit Planning for almost seven years and had increasingly significant outreach responsibilities to inform planning efforts with public input and public involvement that relies upon a range of strategies. Outreach activities supported by Ms. Mackintosh have ranged from small-scale focus groups with older adults or in rural settings, to larger urban forums where a variety of viewpoints are elicited. Ms. Mackintosh has had lead responsibility for the Title VI technical assistance grant with Caltrans to provide support and assistance to small transit providers across the State of California. In that context she has assisted numerous operators in preparing their Public Outreach and Limited English Proficiency outreach plans, working through with operators the range of strategies they can employ to obtain input from sometimes hard-to-access populations. She has prepared numerous Title VI Program Reports including recently for two county transportation commissions, the Riverside County Transportation Commission and the San Bernardino Associated Governments.

Ms. Mackintosh has contributed substantively to most AMMA written products, including for the Bay Area Metropolitan Transportation Commission, Los Angeles Metro and numerous smaller transit properties in California and Oregon. Ms. Mackintosh’s recent grant writing experience includes writing three successful ATP Cycle 2 applications for Los Angeles County cities, for a 100% success rate, contrasting sharply with the 14% success rate statewide. She co-authored two successful \$5310 applications on behalf of Western Placer Consolidated Transportation Services Agency (WPCTSA) and assisted with one for the Imperial County Transportation Commission. She has a Masters of Fine Art Degree in Creative Writing from the University of San Francisco and a Bachelor of Arts in Literature from the University of California at Santa Cruz.

Project Role and Responsibilities: Ms. Mackintosh will have oversight for the community outreach logistics, including venue selection, recruitment of stakeholders and will assist Ms. Menninger with the conduct of the initial workshops.

Dennis Brooks, Planner/ Financial Analyst



Dennis Brooks, AMMA’s Program Administrator/ Planner with a specific background in financial analysis has been with AMMA for almost ten years, since 2006. He has considerable financial and mathematical abilities, which coupled with his own highly organized style, enable him to provide strong analytic products that support project efforts. His previous work included 6 years in a dispatch and supervision role for a magazine company, responsible for developing the routing to ensure the company’s products were delivered in a timely fashion across the Los Angeles region.

Mr. Brooks recently developed multi-year financial forecasts for Placer County’s Consolidated Transportation Services Agency (CTSA), for Visalia Dial-a-Ride, for six Imperial County, CA. demand response programs and the City of Gardena in Los Angeles County. He has constructed budgets for complex multi-organization projects including two successful federal-level procurements, a 5309 funded





regional vanpool program and a VTCLI veteran’s transportation initiative. Among his ongoing responsibilities are monthly invoice review and concurrence for the Riverside County Transportation Commission’s 22 JARC and New Freedom projects, ensuring compliance with regulation and basic accounting practices of these specialized transportation projects. Mr. Brooks is currently enrolled in a degree program in Business Management at Riverside City College and has completed the Pepperdine Transit Management certificate program and several National Transit Institute courses.

Project Role and Responsibilities: Dennis Brooks will have lead responsibility for the development of the Existing Conditions analysis, assisted by various team members, as appropriate. He will also handle the agency survey logistics, in terms of preparation of the e-survey and oversee development of the stakeholders’ distribution listing by physical mail and email. Mr. Brooks will also compile information about existing Section 5310, 5316 and 5317 projects, to the extent that this is available.

John Johnson, GIS Support



John Johnson has worked with the AMMA team since 2006 on numerous projects that involve GIS analysis and will bring that to the mapping needs of this Coordinated Plan. He is playing a significant role in supporting Title VI program reporting and the geographic information mapping components of that, as well as developing considerable expertise in mapping demand response trip data in a variety of ways that are communicative. Mr. Johnson has assisted with mapping services on all of the Coordinated Plans developed by AMMA as well as numerous other transit evaluation studies.

Mr. Johnson has owned and operated the GIS Workshop since 1999, providing custom mapping, cartography, spatial analysis & training to clients across the United States. Prior to this, he was a real estate economist, land use planner, policy manager and educator. Mr. Johnson has helped develop two Community College GIS Certificate Programs and currently serves as the Geospatial Curriculum Advisor to the National Geospatial Technology Center in Corpus Christi, TX.

More information about GIS Workshop services and client base can be found at www.gisws.com

Project Role and Responsibilities: Mr. Johnson will be responsible for the development of mapping and various demographic analyses supporting the Existing Conditions documentation.



Fee Structure

VENTURA COUNTY COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN, 2016 REVISION

	H. Menninger	C. Chambers	D. Brooks	V. Mackintosh	M. Arellano	J. Johnson	Hours	
	Project Manager	Lead: Strategies	Lead: Existing Conditions	Outreach	Data Support	GIS Mapping	#	%
PHASE I Assessment of Resources and Needs								
Task 1 Project Kick-off							28	4%
1.1 Kick-off meeting	8	4	8	4				
1.2 Refinements to schedule and scope	4							
Task 2 Existing conditions and assessment of available services							104	15%
2.1 Review of relevant reports and legislation	4	10	6					
2.2 Demographics analysis of target population	2		4		16	36		
2.3 Inventory of existing transportation services	2		16			8		
Task 3 An assessment of transportation needs for target populations							266	39%
3.1 Develop and administer stakeholder survey	8		16	8	50			
3.2 Conduct 3 stakeholder workshops and 4 consumer focus groups	40	16	16	32	24			
3.3 Identify unmet needs and gaps in service	24	8		24				
PHASE II Strategies, Draft Plan and Priorities								
Task 4 Strategies, activities and/or projects to address the identified gaps							84	12%
4.1 Identify potential strategies to address needs and gaps	12	40	4					
4.2 Relate strategies to potential projects	8	16	4					
Task 5 Priorities for implementation and preparation of first draft plan							88	13%
5.1 Compile first Draft Coordinated Plan	40	20	24	20				
5.2 Conduct 2 prioritization workshops	20	16		12	20			
5.3 Prioritize strategies and/or projects	8	8	4					
PHASE III Final Plan and Presentations								
Task 6 Final Report and Presentations							114	17%
6.1 Second Draft Coordinated Plan and 2 Committee Presentations	30	12	20	12		12		
6.2 Prepare Final Plan and Commissioner Presentation	16	2	10					
Total Hours	226	152	132	112	110	56	684	100%
Direct Labor Rate plus Overhead	\$140.00	\$135.00	\$97.50	\$91.62	\$36.00	\$80.00		
Fixed Fee @ 7%	\$9.80	\$9.45	\$6.83	\$6.41	\$2.52	\$5.60		
Total Cost	\$33,854.80	\$21,956.40	\$13,770.90	\$10,979.74	\$4,237.20	\$4,793.60		

Direct Expenses

Travel and Per Diem Expense

Airfare	\$1,500.00
Lodging	\$1,500.00
Mileage @ \$0.575 per mile	\$900.00

Other Direct Expenses

Incentive/ Thank you gift cards for Focus Groups (\$5 * 40)	\$200.00
Printing	\$1,475.00
Postage for survey mailiing	\$300.00
Newspaper advertisement for public meetings	\$575.00
Simultaneous translation (Spanish - 3 meetings)	\$1,500.00
Total	\$7,950.00

Total Labor	\$89,592.64
Total Expenses	\$7,950.00
Project Total	\$97,542.64





A total project cost of \$97,542 is proposed, to support 684 direct labor project hours and the associated direct expenses of the public meetings, focus groups, translation and printing expense.

The first project phase includes the kick-off meeting and the development of the Existing Conditions assessment of resources and services accounts for 19% of the project hours. The assessment of needs, also in Phase I, accounts for 39% of the project hours and includes the stakeholder survey, conduct of the stakeholder workshops and consumer focus groups, as well as the review of VCTC's annual unmet needs processes.

The second project phase involves 25% of the direct labor hours and draws out the strategies from the Phase I primary and secondary research efforts. The second phase sets forth the strategies, provides for the first draft plan document and convenes two workshops through which to prioritize the strategies.

The final project phase, at 17% of the overall work effort, involves preparing the second draft plan that builds from the prioritization workshop and comments of stakeholders and provides for the presentation of this second, almost final draft plan document to VCTC's key committees. Following their reaction and comments, the final Ventura County Coordinated Public Transit-Human Services Transportation Plan Revision will be prepared and presented to the VCTC Board of Commissioners.

Certification of Federal Compliance

AMMA Transit Planning has no difficulty complying with the contract provisions and required certifications found in Appendix A of the RFQ of January 14, 2016. Because this is a proposed procurement of less than \$100,000, we have not provided for its subcontractor Mobility Planners LLC a signed debarment, suspension, ineligibility or voluntary exclusion statements.

We are happy to do so, if it is deemed necessary by the VCTC procurement staff.

A signed certification for AMMA Transit Planning is provided as Appendix B, attached to and included with the consultant's submittal.



Attachments

Appendix A - Team Member Resumes

Appendix B – Contract Provisions and Requirements Signed



HEATHER MENNINGER

PRINCIPAL, AMMA TRANSIT PLANNING

Expertise

Ms. Menninger, as sole proprietor of AMMA Transit Planning, has more than 25 years’ experience in planning for improvement of community-based public transit and paratransit programs, particularly those serving disadvantaged populations, seniors, persons with disabilities and low-income families. In more than 150 consulting engagements in rural, small urban and larger urbanized settings, Ms. Menninger’s work has sought to cost-effectively and creatively meet a breadth of consumer needs to improve mobility and to document these improvements. This has often means securing additional funding by which to expand or improve service. Specific areas of expertise include:

- Transit Needs Assessments, Short Range Transit Plan Development and Service Planning
- Americans with Disabilities Act Complementary Paratransit and Demand Response
- Active Transportation
- Senior/Non-Emergency Medical Transportation/ Veteran Transportation
- Public Transit-Human Services Transportation Coordination Plans/ Mobility Management
- Transit Performance Measurement
- National Research Projects

Additional details of Ms. Menninger’s experience can be found at: www.ammatransitplanning.com

Education

California State Polytechnic University at Pomona, California

College of Environmental Science - Master’s in Urban and Regional Planning, 2002

Brandeis University, Waltham, Massachusetts

Florence Heller School of Social Welfare - Master's Management of Human Services, 1981

Hampshire College, Amherst, Massachusetts

American Studies Major (Literature and Philosophy) - Bachelor of Arts, 1977

Relevant Project Experience

AMMA Transit Planning [A Menninger Mayeda Alternative] Riverside, CA (1987 - present)

Principal. Partnership, now sole-proprietorship, formed to bring professional evaluation and problem solving resources, skills and expertise to analysis and evaluation of human services, including public transit programs. Lead responsibilities, project management and project support in the following projects.

- **National research projects** –*Transit Cooperative Research Program (TCRP) Report 164: Community Toolbox for Improving Options and Coordination of Transportation for Military Service Members, Veterans and Their Families. American Association of Retired Persons (AARP) Advocacy Toolbox for Rural Public Transportation (2014). TCRP A-21: Report 70 Innovation and Change in Small Urban and Rural Transit (2000).*
- **Grant funding secured, recent:** Secured \$13.5 million for 40 projects in Southern California’s Inland Empire, a mix of Section 5310 and local sales tax funds in FY 15/16; grant development of five winning Active Transportation Cycle 2 projects in Los Angeles County; successful FTA Section 5310 rural grants in FY 14/15 in Imperial, Placer and Lake Counties. Round I Federal VTCLI grant in 2012.
- **Technology-based projects:** Inland Southern California Vet Link One-Call/One-Click (VTCLI) Project/ 2-1-1 United Way San Bernardino; Visalia Green Line Call Center Evaluation; Trinity Transit’s Web-based Travel Training Application; City of Greensboro, NC Call Center Assessment.
- **Coordinated Public Transit-Human Services Transportation Plan Development and Plan Update** – Medford, Oregon’s United We Ride Plan; Flagstaff, AZ. Coordinated Business Plan; Fresno County Public





Transit Gap Analysis and Coordination Plan; Coordinated Plan updates for Kern County, Tuolumne and Calaveras Counties, Ventura, Riverside and San Bernardino Counties. Original plans for: San Luis Obispo County – SLCOG: Butte County- BCAG; Los Angeles County-ASI; Ventura County Transportation Commission; North San Diego County; Maricopa County, AZ-Phoenix Valley Metro; County of San Bernardino; Riverside County Transportation Commission; San Bernardino Associated Governments; Riverside County's SunLine Transit, Los Angeles County Transportation Authority [INFOLINE].

- **Transit performance assessment, management and comprehensive operations evaluation** – Orange County Transportation Authority; Omnitrans; Cities of Montebello, Riverside Transit Agency, Claremont, Santa Monica, Downey, Pasadena, Glendale, Whittier, Rancho Mirage, Barstow, Morongo Basin Transit.
- **Fixed-route transit and paratransit planning/ TDPs and SRTPs** – Visalia Transit; Imperial Valley Transportation Commission; Trinity Transit; Western Placer County Consolidated Transportation Services Agency OCTA *Go Local* Planning for: City of Mission Viejo, Dana Point-San Juan Capistrano-San Clemente, City of Irvine; City of Los Angeles; Orange County Transportation Authority; Greensboro Transit Agency, N.C.; Antelope Valley Transit Authority; Placer County Transportation Planning Agency; SCAG Southeast Gateway Cities, Los Angeles DOT/Los Angeles County MTA, Phoenix, AZ., Riverside Transit Agency, Riverside County Transportation Commission, Cities of Downey, Torrance, Huntington Beach, Pasadena, Santa Monica, Needles, La Canada Flintridge, La Crescenta.
- **Mobility management and human service transportation evaluation studies** – Placer County Consolidated Transportation Services Agency; Western Riverside County Measure A Specialized Transit Evaluation; Blindness Support Services/ The California Endowment; Los Angeles County Early Infant Intervention Program; San Bernardino County Home Delivered Meals Program.
- **Transit performance measures, monitoring, reporting and contracting** – Riverside County Transportation Commission, San Bernardino Associated Governments; Orange County Transportation Authority, Southern California Association of Governments, County of Los Angeles, cities of Downey, Glendale, Barstow.
- **Taxi and taxi voucher studies** – City of Los Angeles, City of Long Beach, Claremont, Rancho Mirage.
- **Senior transportation/ non-emergency medical transportation planning studies** – Lake County NEMT Study; High Desert Medical Center Needs Assessment; San Bernardino/ Riverside Counties 5313 Non-Emergency Medical Study; County of Orange; San Diego County Aging Services; San Diego Association of Governments; City of Laguna Woods; City of Huntington Beach.
- **Human service transportation evaluation studies** – Western Riverside County Measure A Specialized Transit Evaluation; Blindness Support Services/ The California Endowment; Los Angeles County Early Infant Intervention Program; San Bernardino County Home Delivered Meals Program.
- **Americans with Disabilities Act trip modeling, planning and service monitoring** – City of Greensboro, North Carolina; University of Kansas, Lawrence, KS.; Orange County Transportation Authority, Omnitrans, Victor Valley Transit Authority, Mountains Area Regional Transit Authority, Cities of Downey, Barstow, Rancho Mirage; Ventura County's SCAT.
- **Bus stop amenities study** – Omnitrans; Mountain Area Regional Transit (MBTA).
- **Staffing coordination councils** -- San Bernardino County's Public and Specialized Transportation Advisory Council (1990 to present); City of Greensboro, N.C. SCAT Rider Advisory Board, City of Downey Citizens' Ad Hoc Transportation; others.

Additional details of Ms. Menninger's experience can be found at www.AmmaTransitPlanning.com

Publications and Presentations

NATIONAL PUBLICATIONS

Transportation Research Record #2419 “Americans with Disabilities Act Cost Savings and Increased Fixed-Route Ridership Through Transit Agency Travel Training”, H. Menninger, V. Werly. Washington, DC, 2014, pp. 88-89.

Transit Cooperative Research Report 164: Community Tools to Improve Transportation Options for Veterans, Military Service Members and Their Families. KFH Group and AMMA. Transportation Research Board, National Academy Press, Washington DC, 2013.

Transportation Research Board 90th Annual Meeting—Presentation-Session 534 “ ,January 25, 2011.



Transportation Research Record # 2034 **“Measuring Demand Management Impacts in a Sustainable Compliance Environment for the Americans with Disabilities Act”**. H. Menninger-Mayeda, E. Rogers, D. Wiemiller, P. Sampson, G. Davis, National Research Council, Washington DC, 2007, pp. 123-133.

Transportation Research Record #1884 **“ADA Demand Forecasting for Orange County Transportation Authority’s ACCESS Program”** H. Menninger-Mayeda, P. Berger, D. Berger, B. McCormick, D. Boyle. Transportation Research Board, National Research Council, Washington DC, 2004, pp. 55-64.

Transit Cooperative Research Report 70: Guidebook for Change and Innovation at Rural and Small Urban Transit Systems. KFH Group and AMMA. Transportation Research Board, National Academy Press, Washington DC, 2001.

Transportation Research Record #231 - **“The Sacramento Mobility Training Project: Early Results”**, Starks, J., Simpson, C.; Menninger, H., pp. 630-638, May 1985.

OTHER PRESENTATIONS AND PUBLICATIONS:

Presentation at CalAct, Spring Conference. Non-Emergency Medical Transportation Study Findings and Recommendations for Rural Lake County, Indian Wells, CA. April 20, 2011.

Evaluation of Six San Diego County Senior Transportation Programs: Transit Planning for the Graying of America, Master’s Degree Thesis, Urban and Regional Planning Dept., Cal Poly Pomona, June 2002.

Presentation at the 14th National Rural Public and Intercity Bus Transportation Conference, **“Status Report on TCRP A-21 – Innovation in Rural and Small Urban Transit”**, Lake Tahoe, CA. November 2002.

Presentation at the *Aging Summit – Senior Issues into the Next Century*: Sponsored by the County of San Diego, Aging and Independence Services. **“Senior Mobility and Senior Transit Issues in San Diego County”**, San Diego, CA. February 2000.

Workshop Proceedings on Transportation and the Elderly: San Bernardino and Riverside Counties, Ontario, CA, February 14, 1995, 15 pages.

Presentation at the *American Association of Homes for the Aging*: **“Transportation Services to the Rural Elderly,”** San Diego, CA, October 22, 1993.

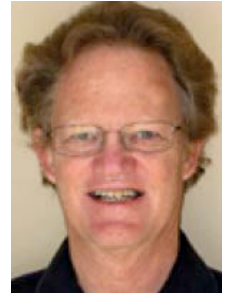
Presentation at the *Transportation Research Board Conference*: **“Transit Professionals and Consumers Jointly Developing Service Guidelines”**, Phoenix, AZ, May 1993.

“Transportation Implications of Supported Employment Programs”, Menninger, H., Mayeda T. California Regional Centers Journal, 23 pages, July 1988.



www.mobilityplanners.com

CLIFFORD CHAMBERS, Owner
Mobility Planners LLC



Education and Training

B.A. Geography, University of California, Los Angeles (1975)
M.C.P. City and Regional Planning Department, University of California, Berkeley (1986)
Emphasis was transportation and land use planning.

Coordinated Public Transit-Human Services Transportation Plans

- Project Manager for developing a Coordinated Plan for Stanislaus County. Included online survey of 100 human service agencies, eight focus groups of consumers and two strategy prioritization workshops (2016)
- Assisted AMMA Transit Plan in developing five goals and thirty-eight strategies for LA Metro Coordinated Plan (2015).
- Project Manager for Coordinated Plan in Fresno County (2014). Market research included e-survey of over 600 case managers who work directly with very low income populations. Intercept survey of 537 transportation disadvantaged individuals utilized to craft 17 specific strategies to fill mobility gaps.
- Developed goals and strategies with AMMA Transit Planning for Coordinated Plan in Imperial County (2014).
- Developed a public transit-human services transportation coordination plan for six rural and urban subareas of San Bernardino County for SANBAG (2007).

National Transportation Research

- Principal Investigator for nationwide study on institutional barriers in intermodal planning and policies in metropolitan areas for Transit Cooperative Research Program (TCRP Report 14, 1996).
- Developed strategies to assist local transportation agencies in becoming mobility managers as part of Transit Cooperative Research Program (TCRP Report 21, 1997).
- Project Manager for TCRP research effort on the best public transportation practices that address the mobility issues of transit dependent populations (TCRP Report 49, 1998). A compendium of brief summaries of the best public transportation practices that address immobility was prepared.
- Managed development of a life cycle cost model to compare hybrid diesel, hybrid gasoline, compressed natural gas, and diesel buses for TCRP C-15 with West Virginia University (2008). Provided hands-on industry testing on how the model could be utilized for bus procurements.

Clifford Chambers, page two





Transit Planning and Management Experience

- Led an assessment of transit accessibility to social service and health care facilities in Alameda and Contra Costa County for the Metropolitan Transportation Commission (2011).
- Developed short range transit plans In California for Morongo Basin Transit Authority (ongoing) Lake Transit (2015), Trinity Transit (2014) Redding Area Bus Authority (2014), Modoc Transportation Authority (2013), Tuolumne Yosemite Service Analysis (2013), Merced County Association of Governments (2012), Mountain Area Regional Transit Authority (2012), Mendocino Transit Authority (2012), Nevada County Transportation Commission (2011), Yosemite Area Regional Transit System (2010). Before 2010, Project Manager for successful completion of community transit plans for 25 small urbanized and rural transit agencies. All plans included needs assessment, market research, community based route design, and development of detailed financial management plans including fare policy analysis.
- Developed Long Range Transit Plans for four transit operators for the Sacramento Area Council of Governments (2009). Conducted stakeholder interviews, operator workshops, and developed demand threshold guidelines as part of the Long Range Transit Plan process. Provided technical assistance to SACOG staff on MTP 2035 transit issues.
- Led multi-disciplinary team for a Mobility Implementation Plan for the Champaign-Urbana (IL) Transit District (2006-11).
- Conducted a comprehensive assessment of fixed route and ADA Paratransit services in Fremont and Newark, CA for AC Transit (2005).
- Project Manager for development of Marin Transit Futures: Improving Local Transit Choices for Marin County, CA (2000). Comprehensive countywide plan led to the successful passage of a sales tax measure to fund the recommendations.

Elderly and Disabled Transportation Experience

- Developed ADA Paratransit Plan Updates for Nevada County (2010) and City of Tracy (2009)
- Provided ADA Paratransit Plan technical assistance for SunLine Transit and Santa Clara Valley Transportation Authority (CA). Evaluated intercounty paratransit services and developed a coordination plan for the Regional Paratransit Plan for the Metropolitan Transportation Commission in the San Francisco Bay Area.
- Evaluated ADA Paratransit Plans for FTA Region VI, under subcontract to Battelle.
- Provided ADA Paratransit Plan technical assistance for SunLine Transit and Santa Clara Valley Transportation Authority (*CA Fare Media Administration*)
- Project Manager and Principal-In-Charge of 10-year contract with Metropolitan Transportation Commission to administer the Regional Transit Connection Clearinghouse. Provided fare media distribution of most Bay Area transit operators to over 200 major employers (1988-1998).



DENNIS BROOKS

FINANCIAL ANALYST / PROGRAMS MANAGER, AMMA TRANSIT PLANNING

Expertise

Mr. Brooks comes from a private sector background of sales and distribution where, among other responsibilities, he supervised and was responsible for the daily dispatching of drivers and coordination of their on-time delivery of product. His considerable financial and mathematical abilities are coupled with his own highly organized style, enabling him to provide strong analytic products that support project efforts. He is also responsible for the management of AMMA’s multiple inventory databases as they relate to survey data collection, contacts management, and trip data analysis. Mr. Brooks has lead responsibility for the collection and analysis of transit system data and for reviewing system budgets to develop assumptions for projecting expenses and revenues.

Mr. Brooks’ personable style and project management abilities enable him to work easily and effectively with others, even at geographic distances, helping to keep projects moving forward and on-schedule. An employee of AMMA Transit Planning for over eight years, since 2006. Mr. Brooks is currently enrolled in a degree program in Business Management at City of Riverside Community College, and taken various courses and classes over the years, including the University of the Pacific’s Transit and Paratransit Management Certificate program.

Relevant Transit Planning Experience

- Supporting AMMA’s development of the **Needles Area Transit Short Range Transit Plan**, Mr. Brooks has lead responsibility for analysis of two survey efforts: passenger on-board survey results and an intercept survey. His on-board survey analysis leans heavily upon his recent experience with Dan Boyle & Associates in relation to **Glendale’s Bee Line** on-board survey and **Fayetteville, North Carolina’s FAST** on-board survey.
- Supporting Mobility Planner’s Focused Comprehensive Operational Analysis for **Morongo Basin Transit Authority’s**, including a fare analysis, in the wake of a recent fare increase and a financial analysis of MBTA operating experience.
- Lead responsibility for the **Short Range Transit Plan Imperial County** financial plan for its seven demand responsive programs, developing cost estimates and projections. Under subcontract to led AE Com, financial planning was complicated by transition to a new operations contractor and limited availability of detail related to historical expenditures.
- Recently completed the **Short Range Transit Plan for the Western Placer CTSA** on behalf of the **Placer County Transportation Planning Agency (PCTPA)**, responsible for a seven year operating and capital financial plan and incorporated estimated costs for new and innovative pilot project initiatives added to the CTSA’s umbrella of services. The final financial plan presented detailed assumptions for projecting operating and capital costs, with estimated revenue levels from partner agencies’ match and from various state and local funding streams.
- Lead responsibility on updates to the Short Range Transit Plans for three rural regions of San Bernardino County on behalf of the **San Bernardino Associated Governments (SANBAG)**, the County Transportation Commission. For this effort Mr. Brooks evaluated both the fixed-route and paratransit services’ costs and projected expenditures for the **Morongo Basin Transit Authority (MBTA)**, **Mountain Area Regional Transit Authority (MARTA)**, and the **City of Needles**. The resultant financial plan updates involved the collection of system performance data service characteristics, demographics analyses, and five year





operating and capital financial plans that utilized a variable cost allocation model designed to track expenses by service mode.

Additional Relevant Experience

- Assisted in the analysis of system performance data and rider survey results for the **Comprehensive Operational Analysis** of the **Greensboro Transit Authority’s Dial-A-Ride** service, in North Carolina and in **Fayetteville, North Carolina for the FAST Dial-a-Ride**. Responsibilities also included an in-depth examination of the agency’s dispatch techniques and utilization of Trapeze dispatching and fleet management software.
- Mr. Brooks has responsibly, as part of AMMA’s overall contract with **Caltrans’ Rural Transportation Assistance Program (RTAP)**, to assist transit properties in **Title VI Regulatory Compliance (C. 4702.1B)** specifically in relation to developing system service standards and sub-recipient monitoring that complies with federal regulations.
- Entering the sixth year of ongoing monthly invoice concurrence and performance monitoring for the **Riverside County Transportation Commission’s (RCTC)** twenty-two formerly FTA Section 5316 Job Access and Reverse Commute and Section 5317 New Freedom projects, with continuing Section 5310 projects that include several mobility management projects. Responsible for ensuring compliance with program regulations and with basic accounting practices of grant recipients for their specialized transportation projects.



VALERIE MACKINTOSH

COMMUNITY OUTREACH SPECIALIST/ ANALYST, AMMA TRANSIT PLANNING



Expertise

Valerie Mackintosh supports AMMA as a writer and public outreach coordinator/facilitator. Ms. Mackintosh brings experience in qualitative thinking and community involvement from a range of technical and service backgrounds, several involving working with the public. Through her professional work with AMMA, Ms. Mackintosh has become attuned to the value of procedures as they relate to service delivery. Her orientation to the structure of procedures has been informed through work in several technical settings, including developing Title VI programs, the VTCLI, FTA 5310, 5315, 5317, and ATP grant processes, and the development of policy and procedure manuals.

Education

- Master in Fine Arts in Writing at the University of San Francisco (2014)
- Bachelor of Arts in World Literature from the University of California, Santa Cruz (2008)
- Certificate in in Public Involvement in Transportation Decisionmaking National Transit Institute (2011)

Relevant Public Outreach and Involvement Experience

- **Interviewing agency staff and representatives; community stakeholders**
 - 2015 Lake County Update to the Coordinated Public-Transit Human Services Transportation Plan for Lake County; 2013 Lake Transit Development Project; TCRP B-42 “Community Toolbox for Improving Options and Coordination of Transportation for Military Service Members, Veterans, and their Families”; 2011 Short Range Transit Plan for the Western Placer Consolidated Transportation Services Agency.
- **Coordinating on-site agency interviews and focus groups for projects’ outreach components**
 - 2013 Update to the Coordinated Public-Transit Human Services Transportation Plan Kern County; for 2012 “United We Ride” Plan for the Rogue Valley; 2011 Update to the Coordinated Public-Transit Human Services Transportation Plan for San Bernardino County; 2011 Update to the Coordinated Public-Transit Human Services Transportation Plan for Riverside County; 2011 Short Range Transit Plan for the Western Placer Consolidated Transportation Services Agency.
- **Assisting in survey development, design and analysis, including telephone, mail and internet-based surveys, as part of the public involvement process for various projects**
 - 2014-2015 Title VI Program development for two RTPA’s and five rural transit providers; 2013 Title VI Program development for Morongo Basin Transit Authority; 2012 Hi-Desert Memorial Health Care District Non-Emergency Medical Transportation Needs Assessment; 2011 Non-Emergency Medical Plan for Lake County; 2011 Short Range Transit Plan for the Western Placer Consolidated Transportation Services Agency; 2010 Greensboro Transit Authority Operational Analysis of the ADA Complementary Paratransit Services; 2010 Door Assistance Transportation Needs Assessment for the County of Los Angeles; 2009-2011 LA Metro’s Seniors on the Move Travel Training Program.

Active Transportation Program (ATP) Grant Assistance

- 2015 Active Transportation Program Grant writing and development assistance for three Los Angeles County cities on behalf of Los Angeles Metro. Developed three grant applications, including project development, in two-month period for projects that improved pedestrian and bike passage ways for students, older adults, and entire communities. Projects included: The City of Lancaster Road Diet and Bike Lane Project will provide a Safe





Route to School for two elementary schools and added three miles of new bike lanes along a high-speed corridor; The City of Arcadia’s Bike Facility program will add 15.5 miles of bike lanes that traverse the City, connecting to the new Gold Line Station and regional employers and will serve 10 schools; The City of Lynwood’s Pedestrian Improvements will add almost 2 miles of pedestrian walkways that will increase safety, provide linkages to the City’s walking park, the Green Line Station, and one middle school. All three projects were successfully funded and will receive Federal ATP Funds, for a success rate of 100% compared to a 14% overall selection rate for the overall statewide application pool.

Technical Assistance Experience

- 2013-2015 Title VI Program Development and Technical Assistance for Small Urban and Rural Transit Providers: Interpreting FTA Circulars and guidance to develop tools, templates, and resources for smaller transit operators; presentation of materials at CalACT’s 2013 and 2014 Spring conferences and two state-wide conferences, Title VI Program development for six small urban and rural transit providers and two RTPA’s.
- 2012 and 2015 assistance to human service and public transit agencies with JARC, New Freedom and 5310 grant development. Assistance included project scoping and developing compelling narrative.
- 2012 Development of a Dial-A-Ride Driver’s Policies and Procedures Handbook for City of Downey, CA’s Transit Program

Transit Travel Training / Mobility Management Experience

- 2012 Transit Mobility and Awareness Plan for Trinity Transit: Preparation of Travel Training Tools, several self-guided Trip Plans as well as PowerPoint presentations for riders and for gatekeepers.
- 20011 Development of a Rural Transportation Advocacy Toolkit for the AARP (American Association of Retired Persons): six transportation fact sheets oriented to rural transportation issues and educating policy makers and advocates about meeting the mobility needs of rural older persons.
- 2009-2011 LA Metro’s Seniors on the Move Travel Training Program: responsibility for various training, coordination and evaluation activities during AMMA’s three-year administration of 18 workshops across Los Angeles County.



John Jay Johnson

GIS WORKSHOP

Principal, GIS Workshop, Encinitas, CA est. 1999 Cartography & Spatial Analysis
john@gisws.com 1614 Hawk View Drive, Encinitas, CA 92024-1251 (760) 889-8606



EDUCATION

- Master of Business Administration, University of California, Irvine, 1987
- Master of Urban & Regional Planning, University of Oregon, 1983
- Bachelor of Arts, Geography, University of British Columbia, 1977

RECENT PROFESSIONAL EXPERIENCE

2015

- **LA Metro;** Mapped older adults, disabled and low-income population and no-vehicle households in San Fernando Valley, San Gabriel Valley, Westside/Central, Gateway Cities, South Bay, Santa Clarita, Lancaster/Palmdale & the unincorporated areas of LA County. - A.M.M.A.
- **LA Metro Active Transportation Project;** Mapped bike lanes, improvements, activity centers in Arcadia, Bell, Lancaster, Lani, Laverne, Lynwood, Orange Line/Sherman Way & Redondo Beach - A.M.M.A.
- **Riverside County Transit;** Mapped transit routes in Riverside County, including R.T.A, Corona Cruiser, PASS Transit, Sunline Transit and Palo Verde Valley Transit. - A.M.M.A.
- **Riverside County Transit Consumers;** Mapped trip enrollees on Riverside County fixed route transit systems - A
- **California;** Mapped hospitals & Clinics in California – COPE
- **Monterey;** Mapped providers & hospitals in proximity to low income population in Monterey County, CA – COPE.
- **New York;** Mapped patient density, patient-provider density, provider density, providers & attributed lives in New York, NY – COPE.
- **New York;** Mapped Montefiore Health Systems sites in New York, NY – COPE.
- **Glendale;** Mapped Glendale Transit System, low-income/minority population and population within ¼ and ½ mile of transit routes – DBA.
- **Norwalk;** Mapped Norwalk Transit System, low-income/minority population and population within ¼ and ½ mile of transit routes – DBA.
- **Reno, NV;** Mapped elderly population, employment, density, poverty, jobs, zero-vehicle households & population < 18 years of age – DBA.
- **San Clemente, CA;** Mapped limited English proficiency, elderly population, density, poverty, jobs, zero-vehicle households and population < 18 years of age – DBA.
- **San Juan Capistrano, CA;** Mapped trolley routes for S.J.C. – DBA.
- **LA County;** Project area map for SE Cities Active Transportation Plan Project – JNTC.

2014

- **Imperial County;** Mapping transit routes, common destinations & other demographic Information, A.M.M.A., Imperial County, CA
- **Lake County;** Mapping transit routes, common destinations & other demographic Information, A.M.M.A., Lake County, CA
- **OCTA & ACCESS;** Mapping passengers, boardings, health facilities & other demographic Information, A.M.M.A., Orange County, CA
- **San Bernardino & Riverside Counties, Ca;** Mapping Veteran population and facilities by census tract, AMMA,
- **Trinity County, CA;** Mapping demographic information, AMMA,.
- **City of Burbank, CA;** Mapping transit routes & demographic information, Dan Boyle & Associates,
- **City of Gardena, CA;** Mapping transit routes, origin & destination of passengers, Dan Boyle & Associates,
- **City of Glendale, CA;** Mapping transit routes, origin & destination of passengers, destination of workers, Dan Boyle & Associates,
- **City of Montebello, CA;** Mapping transit routes, Dan Boyle & Associates,

2013





- **Riverside County Transportation Commission (RCTA)**, Annual Countywide Transportation Performance Report; Mapping & buffering transit routes & calculating population within ¼ miles of routes and commuter link stops. Mapping other demographic Information, A.M.M.A., Riverside County, CA
- **Calaveras & Tuolumne County, CA**; Mapping demographic information, AMMA,
- **Coconino County, AZ**; Mapping demographic information, AMMA,
- **City of El Monte, CA**; Mapping transit routes & demographic information, AMMA,
- **Kern County, CA**; Mapping demographic information, AMMA,
- **Palo Verde Valley Transit Agency**; Mapping transit routes & demographic information, AMMA, Riverside County, CA.

2012

- **Metropolitan Transportation Commission (MTC) Coordinated Public Transit Human Services Transportation Plan 2012 Update**, mapping & demographic Information, A.M.M.A., Riverside, CA
- **Rogue Valley Transportation District (RVTD) Coordinated Public Transit – Human Services Transportation Plan Update**, mapping & demographic Information, A.M.M.A., Riverside, CA
- **Tarrant County** patient mapping by hospital, clinic, medicaid, medicare, fee for service, government payer, self-pay, managed care, high risk & frequent users, Cope Health Solutions, Los Angeles, CA.
- **Texas Region 10 Health Care Partnership mapping/analysis**, Cope Health Solutions, Los Angeles, CA
- **Los Angeles Medicare-Medical Dual Beneficiaries mapping/analysis**, Cope Health Solutions, Los Angeles, CA
- **San Diego Health Care Facilities mapping**, Cope Health Solutions, Los Angeles, CA
- **Ventura County Work Area Profile & Employment mapping**, A.M.M.A., Riverside, CA
- **Consolidation of 12 DACUM Job Analyses into a ‘National Inventory of Geospatial Workforce Competencies’**, National GeoTech Center, Corpus Christi, TX

2011

- **Long Island Bus Service Route Reduction mapping**, Nassau County, NY, Veolia Transportation, NY
- **Placer County-Health Express, Trip Origin and Destination Patterns**, A.M.M.A., Riverside, CA
- **Downey Southwest Route Alignment Alternatives**, A.M.M.A., Riverside, CA
- **Adult Day Care Centers, San Diego County**, Cope Health Solutions, Los Angeles, CA
- **San Sedro Health Center Locations**, Cope Health Solutions, Los Angeles, CA
- **AltaMed Medical Facilities, Los Angeles, CA**, Cope Health Solutions, Los Angeles, CA
- **Regional ANC Partners, Southern California**, Cope Health Solutions, Los Angeles, CA
- **Community Health Centers & Physicians of Southeastern San Diego**, Cope Health Solutions, Los Angeles, CA
- **Dental Practices of Southeastern San Diego**, Cope Health Solutions, Los Angeles, CA
- **DSH Hospitals, California & Los Angeles County**, Cope Health Solutions, Los Angeles, CA
- **Clinic Development Sites, Chula Vista, CA**, Cope Health Solutions, Los Angeles, CA
- **Potential Community Partners – White Memorial Hospital, Los Angeles, CA**, Cope Health Solutions, Los Angeles, CA
- **Antelope Valley Transit System Routes & Minority & Low Income Resident Population**, Dan Boyle & Associates, San Diego CA.
- **Tri-City Trolley Routes**, Dan Boyle & Associates, San Diego CA.
- **Beach City Transit System Routes & Residential Transit Orientation Index**, Dan Boyle & Associates, San Diego CA.

2010

- **Dana Point Shuttle – Alternate Routes**, Dan Boyle & Associates, San Diego CA.
- **Calculate & map door to door & door thru door indicators of agency services**, AAA Los Angeles Count, A.M.M.A., Riverside, CA
- **Quantify supply and demand for specialized transportation services and project future demand and its spatial distribution**, ASI Los Angeles, Judith Norman Transportation Consultant, Carson, CA.
- **White Memorial, Citrus Valley, Hollywood Presbyterian & St. Mary’s Medical Center Service Areas, Clinics & medical beneficiaries**, Cope Health Solutions, Los Angeles, CA
- **Individual fixed-route and system maps, loading & unloading of passengers by stop & route changes**, Antelope Valley Transit Authority, Dan Boyle & Associates, San Diego CA.

2009

- **Calculate & map population estimates & route miles in urbanized area of Antelope Valley Transit Authority Service Area**, Dan Boyle & Associates, San Diego CA.
- **Calculate & map commuter travel patterns for Victor Valley & Lancaster/Palmdale residents**, Antelope Valley Transit Authority, Dan Boyle & Associates, San Diego CA.
- **Calculate and map passenger boardings & alightings, transit routes, commuter travel patterns & MTA routes for**



revised Beeline transit system, City of Glendale, Dan Boyle & Associates, San Diego CA.

- **Map new routes, boardings by stop, and residential transit orientation index (RTOI) for revised system analysis, City of Monterey Park, Dan Boyle & Associates, San Diego CA**
- **Generate and map - population projections by age, race & ethnicity for Victor Valley Study Area, City of San Bernardino, A.M.M.A., Riverside, CA**

RECENT PAPERS & PUBLICATIONS

- **Opportunities in an expanding Geospatial Job Market;** Paper on U.S. employment projections by geospatial occupations including salaries, job openings, size, current and projected growth rate – GEOTECH Center, Aug, 2015
- **Inventory of Geospatial Workforce Competencies for GIS and Remote Sensing Occupations, John Johnson, National GeoTech Center, April, 2012**
- **National DACUM Job Analysis: Remote Sensing Specialist,** Inc. National Survey of Remote Sensing professionals, National GeoTech Center, Corpus Christi, TX, 2011.
- **What GIS Technicians Do: A Synthesis of DACUM Job Analyses,** Journal of the Urban and Regional Information Systems Association (URISA), Vol. 22, No. 2, 2010.

FEDERAL TRANSIT ADMINISTRATION (FTA) REQUIREMENTS

1. FEDERAL CHANGES

The CONSULTANT shall at all times comply with all applicable Federal Transit Administration (FTA) regulations, policies, procedures and directives, including without limitation those listed directly or by reference in the grant agreements between the Ventura County Transportation Commission (VCTC) and FTA, as they may be amended or promulgated from time to time during the term of this contract. Failure by the CONSULTANT to so comply shall constitute a material breach of this contract. In the event any such changes significantly affect the cost or the schedule to perform the work, the CONSULTANT shall be entitled to submit a claim for an equitable adjustment under the applicable provisions of this contract.

2. NO GOVERNMENT OBLIGATIONS TO THIRD PARTIES

The VCTC and the CONSULTANT acknowledge and agree that, notwithstanding any occurrence by the Federal Government in or approval of this solicitation or award of this Contract, absent the express written consent by the Federal Government, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to VCTC, the CONSULTANT, or any other party (whether or not a party to this Contract) pertaining to any matter resulting from this Contract.

The CONSULTANT agrees to include the above clause in each subcontract financed in whole or part with Federal assistance provided by FTA. It is further agreed that the clause shall not be modified, except to identify the subCONSULTANT who will be subject to its provisions.

3. TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

During the performance of this Contract, the CONSULTANT, for itself, its assignees and successors in interest (hereinafter referred to as the "CONSULTANT"), and subCONSULTANTS agree as follows:

A. COMPLIANCE WITH REGULATIONS:

The CONSULTANT shall comply with the Regulations relative to nondiscrimination in federally assisted programs of the Department of Transportation (hereinafter "DOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this contract.

B. NONDISCRIMINATION

In accordance with Title VI of the Civil Rights act, as amended, 42 U.S.C. 200d section 3 03 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. 6102, section 202 of the Americans with Disabilities Act of 1990, 42 U.S.C. 12132, and Federal Transit laws at 49 U.S.C. 5332, the CONSULTANT agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, age, or disability. In addition, the CONSULTANT agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue.

C. EQUAL EMPLOYMENT OPPORTUNITY

The following equal employment opportunity requirements apply to this Contract:

1. **Race, Color, Creed, National Origin, Sex** – In accordance with title VII of the Civil Rights Act, as amended, 42 U.S.C. 5332, the CONSULTANT agrees to comply with all applicable equal employment opportunity requirements of the U.S. Department of Labor (USDOL) regulations, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor,” 41 CFR Parts 60 et seq., (which implement Executive Order No. 11246 Relating to Equal Employment Opportunity,” as amended by Executive Order No. 11375, “Amending Executive Order No. 11246 Relating to Equal Employment Opportunity,” 42 U.S.C. 2000e note), and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of the project for which this Contract work is being performed. The CONSULTANT agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment of recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
2. **Age** – In accordance with section 4 of the Age discrimination in Employment Act of 1967, as amended, 29 U.S.C. 623 and Federal Transit laws at 49 U.S.C. 5332, the CONSULTANT agrees to refrain from discrimination against present and prospective employees for reasons of age. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
3. **Disabilities** – In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. 12112, the CONSULTANT agrees that it will comply with the requirements of U.S. Equal Employment Opportunity Commission, “Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act,” 29 CFR Part 1630, pertaining to employment of persons with disabilities. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
4. **Immigration and Naturalization Act of 1986** – In connection with the execution of this Contract, the CONSULTANT must comply with all aspects of the federal Immigration and Naturalization Act of 1986.

D. SOLICITATIONS FOR SUBCONSULTANTS, INCLUDING PROCUREMENT OF MATERIALS AND EQUIPMENT:

In all solicitations either by competitive bidding or negotiation made by the CONSULTANT for work to be performed under a subcontract, including procurement of materials or leases of equipment, each potential subCONSULTANT or supplier shall be notified by the CONSULTANT of the CONSULTANT’s obligations under this contract and the Regulations relative to non-discrimination on the grounds of race, color, or national origin.

E. INFORMATION AND REPORTS:

The CONSULTANT shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by VCTC or the Federal Transit Administration to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information required of a CONSULTANT is in the exclusive possession of another who fails or refuses to furnish this information, the CONSULTANT shall so certify to VCTC or the Federal Transit Administration as appropriate, and shall set forth what efforts it has made to obtain the information.

F. SANCTIONS FOR NONCOMPLIANCE:

In the event of the CONSULTANT's noncompliance with nondiscrimination provisions of this contract, VCTC shall impose contract sanctions as it or the Federal Transit Administration may determine to be appropriate, including, but not limited to:

1. withholding of payments to the CONSULTANT under the contract until the CONSULTANT complies; and/or
2. cancellation, termination, or suspension of the contract, in whole or in part.

G. INCORPORATION OF PROVISIONS:

The CONSULTANT shall take such action with respect to any subcontract or procurement as VCTC or the Federal Transit Administration may direct as a means of enforcing such provisions including sanctions for noncompliance: provided, however, that, in the event a CONSULTANT becomes involved in, or is threatened with, litigation with a subCONSULTANT or supplier as a result of such direction, the CONSULTANT may request VCTC, and in addition, the CONSULTANT may request the United States to enter into such litigation to protect the interests of the United States.

H. SUBCONTRACTS

The CONSULTANT also agrees to include these requirements in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

4. ACCESS TO RECORDS AND REPORTS

The CONSULTANT agrees to provide VCTC, the FTA Administrator, the Comptroller General of the United States or of any of their authorized representatives access to any books, documents, papers and records of the CONSULTANT which are directly pertinent to this Contract for the purposes of making and conducting audits, inspections, examinations, excerpts, and transcriptions.

The CONSULTANT also agrees, pursuant to 49 CFR 633.1.7, to provide the FTA Administrator or his or her authorized representatives, including any Project Management Oversight (PMO) CONSULTANT, access to the CONSULTANT's records and construction sites pertaining to a major capital project, defined at 49 U.S.C. 5302(a)1, which is receiving federal financial assistance through

the programs described in 49 U.S.C. 5307, 5309 or 5311. The CONSULTANT agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

The CONSULTANT agrees to maintain all books, records, accounts and reports required under this Contract for a period of not less than three years after the date of termination or expiration of this Contract, except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case the CONSULTANT agrees to maintain such books, records, account and reports until the VCTC, the FTA Administrator, the Comptroller general, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.

5. TERMINATION

Termination for Convenience - The VCTC, by written notice, may terminate this contract, in whole or in part, when it is in the Government's interest. If this contract is terminated, the Recipient shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of termination.

Termination for Default [Breach or Cause] - If the CONSULTANT does not deliver supplies in accordance with the contract delivery schedule, or, if the contract is for services, the CONSULTANT fails to perform in the manner called for in the contract, or if the CONSULTANT fails to comply with any other provisions of the contract, the VCTC may terminate this contract for default. Termination shall be effected by serving a notice of termination on the CONSULTANT setting forth the manner in which the CONSULTANT is in default. The CONSULTANT will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner of performance set forth in the contract.

If it is later determined by the VCTC that the CONSULTANT had an excusable reason for not performing, such as a strike, fire, or flood, events which are not the fault of or are beyond the control of the CONSULTANT, the VCTC, after setting up a new delivery of performance schedule, may allow the CONSULTANT to continue work, or treat the termination as a termination for convenience.

Opportunity to Cure (General Provision) - The VCTC in its sole discretion may, in the case of a termination for breach or default, allow the CONSULTANT [an appropriately short period of time] in which to cure the defect. In such case, the notice of termination will state the time period in which cure is permitted and other appropriate conditions

If CONSULTANT fails to remedy to VCTC's satisfaction the breach or default or any of the terms, covenants, or conditions of this Contract within [ten (10) days] after receipt by CONSULTANT or written notice from VCTC setting forth the nature of said breach or default, VCTC shall have the right to terminate the Contract without any further obligation to CONSULTANT. Any such termination for default shall not in any way operate to preclude VCTC from also pursuing all available remedies against CONSULTANT and its sureties for said breach or default.

Waiver of Remedies for any Breach - In the event that VCTC elects to waive its remedies for any breach by CONSULTANT of any covenant, term or condition of this Contract, such waiver by VCTC shall not limit VCTC's remedies for any succeeding breach of that or of any other term, covenant, or condition of this Contract.

6. SUBCONSULTANTS' CERTIFICATE REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY OR VOLUNTARY EXCLUSION

- A. The CONSULTANT shall include in each subcontract exceeding \$100,000, regardless of tier, a clause requiring each lower tiered subCONSULTANT to provide the certification set forth in paragraph B of this section. Each subcontract, regardless of tier, shall contain a

provision that the subCONSULTANT shall knowingly enter into any lower tier subcontract exceeding \$100,000 with a person who is disbarred, suspended or declared ineligible from obtaining federal assistance funds. If a proposed subCONSULTANT is unable to certify to the statements in the following certification, the CONSULTANT shall promptly notify City and provide all applicable documentation.

B. Each subCONSULTANT with a subcontract exceeding \$100,000 shall certify as follows:

SubCONSULTANT's Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

1. _____ ("subCONSULTANT") certifies, by submission of its proposal to _____ ("CONSULTANT"), that neither it nor its "principals" (as defined in 49 CFR 29.105(p)1 is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in contracts by any Federal department or agency.
2. If subCONSULTANT is unable to certify to the statements in the certification, subCONSULTANT has attached a written explanation to its proposal to the CONSULTANT.

7. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS AND RELATED ACTS

The CONSULTANT acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. 3801 et seq. And U.S. Department of Transportation (DOT) regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of this Contract, the CONSULTANT certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to this Contract or the FTA assisted project for which this Contract work is being performed. In addition to other penalties that may be applicable, the CONSULTANT further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program fraud Civil Remedies Act of 1986 on the CONSULTANT to the extent the Federal Government deems appropriate.

The CONSULTANT also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. 5307, the Government reserves the right to impose the penalties of 18 U.S.C. 1001 and 49 U.S.C. 5307(n)(1) on the CONSULTANT, to the extent the Federal Government deems appropriate.

The CONSULTANT agrees to include the above two clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subCONSULTANT who will be subject to the provisions.

8. INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The provisions in this Section (FTA Requirements) include, in part, certain Standard Terms and Conditions required by the U.S. Department of transportation (DOT), whether or not expressly set forth in the preceding provisions. All contractual provisions required by DOT, as set forth in FTA Circular 4220.1F, dated November 1, 2008 as it may be amended from time to time, are hereby incorporated in this Contract reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. The CONSULTANT shall not perform any act, fail to perform any act or refuse to comply with any requests of the City which would cause the City to be in violation of the FTA terms and conditions.

Heather Menninger, Principal
AMMA Transit Planning



2/01/2016

EXHIBIT B
COMPENSATION SCHEDULE

DRAFT



Fee Structure

VENTURA COUNTY COORDINATED PUBLIC TRANSIT-HUMAN SERVICES TRANSPORTATION PLAN, 2016 REVISION

	H. Menninger	C. Chambers	D. Brooks	V. Mackintosh	M. Arellano	J. Johnson	Hours	
	Project Manager	Lead: Strategies	Lead: Existing Conditions	Outreach	Data Support	GIS Mapping	#	%
PHASE I Assessment of Resources and Needs								
Task 1 Project Kick-off							28	4%
1.1 Kick-off meeting	8	4	8	4				
1.2 Refinements to schedule and scope	4							
Task 2 Existing conditions and assessment of available services							104	15%
2.1 Review of relevant reports and legislation	4	10	6					
2.2 Demographics analysis of target population	2		4		16	36		
2.3 Inventory of existing transportation services	2		16			8		
Task 3 An assessment of transportation needs for target populations							266	39%
3.1 Develop and administer stakeholder survey	8		16	8	50			
3.2 Conduct 3 stakeholder workshops and 4 consumer focus groups	40	16	16	32	24			
3.3 Identify unmet needs and gaps in service	24	8		24				
PHASE II Strategies, Draft Plan and Priorities								
Task 4 Strategies, activities and/or projects to address the identified gaps							84	12%
4.1 Identify potential strategies to address needs and gaps	12	40	4					
4.2 Relate strategies to potential projects	8	16	4					
Task 5 Priorities for implementation and preparation of first draft plan							88	13%
5.1 Compile first Draft Coordinated Plan	40	20	24	20				
5.2 Conduct 2 prioritization workshops	20	16		12	20			
5.3 Prioritize strategies and/or projects	8	8	4					
PHASE III Final Plan and Presentations								
Task 6 Final Report and Presentations							114	17%
6.1 Second Draft Coordinated Plan and 2 Committee Presentations	30	12	20	12		12		
6.2 Prepare Final Plan and Commissioner Presentation	16	2	10					
Total Hours	226	152	132	112	110	56	684	100%
Direct Labor Rate plus Overhead	\$140.00	\$135.00	\$97.50	\$91.62	\$36.00	\$80.00		
Fixed Fee @ 7%	\$9.80	\$9.45	\$6.83	\$6.41	\$2.52	\$5.60		
Total Cost	\$33,854.80	\$21,956.40	\$13,770.90	\$10,979.74	\$4,237.20	\$4,793.60		

Direct Expenses

Travel and Per Diem Expense

Airfare	\$1,500.00
Lodging	\$1,500.00
Mileage @ \$0.575 per mile	\$900.00

Other Direct Expenses

Incentive/ Thank you gift cards for Focus Groups (\$5 * 40)	\$200.00
Printing	\$1,475.00
Postage for survey mailiing	\$300.00
Newspaper advertisement for public meetings	\$575.00
Simultaneous translation (Spanish - 3 meetings)	\$1,500.00
Total	\$7,950.00

Total Labor	\$89,592.64
Total Expenses	\$7,950.00
Project Total	\$97,542.64



EXHIBIT C

FTA CERTIFICATIONS AND ASSURANCES

DRAFT

FEDERAL TRANSIT ADMINISTRATION (FTA) REQUIREMENTS

1. FEDERAL CHANGES

The CONSULTANT shall at all times comply with all applicable Federal Transit Administration (FTA) regulations, policies, procedures and directives, including without limitation those listed directly or by reference in the grant agreements between the Ventura County Transportation Commission (VCTC) and FTA, as they may be amended or promulgated from time to time during the term of this contract. Failure by the CONSULTANT to so comply shall constitute a material breach of this contract. In the event any such changes significantly affect the cost or the schedule to perform the work, the CONSULTANT shall be entitled to submit a claim for an equitable adjustment under the applicable provisions of this contract.

2. NO GOVERNMENT OBLIGATIONS TO THIRD PARTIES

The VCTC and the CONSULTANT acknowledge and agree that, notwithstanding any occurrence by the Federal Government in or approval of this solicitation or award of this Contract, absent the express written consent by the Federal Government, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to VCTC, the CONSULTANT, or any other party (whether or not a party to this Contract) pertaining to any matter resulting from this Contract.

The CONSULTANT agrees to include the above clause in each subcontract financed in whole or part with Federal assistance provided by FTA. It is further agreed that the clause shall not be modified, except to identify the subCONSULTANT who will be subject to its provisions.

3. TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

During the performance of this Contract, the CONSULTANT, for itself, its assignees and successors in interest (hereinafter referred to as the "CONSULTANT"), and subCONSULTANTS agree as follows:

A. COMPLIANCE WITH REGULATIONS:

The CONSULTANT shall comply with the Regulations relative to nondiscrimination in federally assisted programs of the Department of Transportation (hereinafter "DOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this contract.

B. NONDISCRIMINATION

In accordance with Title VI of the Civil Rights act, as amended, 42 U.S.C. 200d section 3 03 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. 6102, section 202 of the Americans with Disabilities Act of 1990, 42 U.S.C. 12132, and Federal Transit laws at 49 U.S.C. 5332, the CONSULTANT agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, age, or disability. In addition, the CONSULTANT agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue.

C. EQUAL EMPLOYMENT OPPORTUNITY

The following equal employment opportunity requirements apply to this Contract:

1. **Race, Color, Creed, National Origin, Sex** – In accordance with title VII of the Civil Rights Act, as amended, 42 U.S.C. 5332, the CONSULTANT agrees to comply with all applicable equal employment opportunity requirements of the U.S. Department of Labor (USDOL) regulations, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor,” 41 CFR Parts 60 et seq., (which implement Executive Order No. 11246 Relating to Equal Employment Opportunity,” as amended by Executive Order No. 11375, “Amending Executive Order No. 11246 Relating to Equal Employment Opportunity,” 42 U.S.C. 2000e note), and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of the project for which this Contract work is being performed. The CONSULTANT agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment of recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
2. **Age** – In accordance with section 4 of the Age discrimination in Employment Act of 1967, as amended, 29 U.S.C. 623 and Federal Transit laws at 49 U.S.C. 5332, the CONSULTANT agrees to refrain from discrimination against present and prospective employees for reasons of age. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
3. **Disabilities** – In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. 12112, the CONSULTANT agrees that it will comply with the requirements of U.S. Equal Employment Opportunity Commission, “Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act,” 29 CFR Part 1630, pertaining to employment of persons with disabilities. In addition, the CONSULTANT agrees to comply with any implementing requirements FTA may issue.
4. **Immigration and Naturalization Act of 1986** – In connection with the execution of this Contract, the CONSULTANT must comply with all aspects of the federal Immigration and Naturalization Act of 1986.

D. SOLICITATIONS FOR SUBCONSULTANTS, INCLUDING PROCUREMENT OF MATERIALS AND EQUIPMENT:

In all solicitations either by competitive bidding or negotiation made by the CONSULTANT for work to be performed under a subcontract, including procurement of materials or leases of equipment, each potential subCONSULTANT or supplier shall be notified by the CONSULTANT of the CONSULTANT’s obligations under this contract and the Regulations relative to non-discrimination on the grounds of race, color, or national origin.

E. INFORMATION AND REPORTS:

The CONSULTANT shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by VCTC or the Federal Transit Administration to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information required of a CONSULTANT is in the exclusive possession of another who fails or refuses to furnish this information, the CONSULTANT shall so certify to VCTC or the Federal Transit Administration as appropriate, and shall set forth what efforts it has made to obtain the information.

F. SANCTIONS FOR NONCOMPLIANCE:

In the event of the CONSULTANT's noncompliance with nondiscrimination provisions of this contract, VCTC shall impose contract sanctions as it or the Federal Transit Administration may determine to be appropriate, including, but not limited to:

1. withholding of payments to the CONSULTANT under the contract until the CONSULTANT complies; and/or
2. cancellation, termination, or suspension of the contract, in whole or in part.

G. INCORPORATION OF PROVISIONS:

The CONSULTANT shall take such action with respect to any subcontract or procurement as VCTC or the Federal Transit Administration may direct as a means of enforcing such provisions including sanctions for noncompliance: provided, however, that, in the event a CONSULTANT becomes involved in, or is threatened with, litigation with a subCONSULTANT or supplier as a result of such direction, the CONSULTANT may request VCTC, and in addition, the CONSULTANT may request the United States to enter into such litigation to protect the interests of the United States.

H. SUBCONTRACTS

The CONSULTANT also agrees to include these requirements in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

4. ACCESS TO RECORDS AND REPORTS

The CONSULTANT agrees to provide VCTC, the FTA Administrator, the Comptroller General of the United States or of any of their authorized representatives access to any books, documents, papers and records of the CONSULTANT which are directly pertinent to this Contract for the purposes of making and conducting audits, inspections, examinations, excerpts, and transcriptions.

The CONSULTANT also agrees, pursuant to 49 CFR 633.1.7, to provide the FTA Administrator or his or her authorized representatives, including any Project Management Oversight (PMO) CONSULTANT, access to the CONSULTANT's records and construction sites pertaining to a major capital project, defined at 49 U.S.C. 5302(a)1, which is receiving federal financial assistance through

the programs described in 49 U.S.C. 5307, 5309 or 5311. The CONSULTANT agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

The CONSULTANT agrees to maintain all books, records, accounts and reports required under this Contract for a period of not less than three years after the date of termination or expiration of this Contract, except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case the CONSULTANT agrees to maintain such books, records, account and reports until the VCTC, the FTA Administrator, the Comptroller general, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.

5. TERMINATION

Termination for Convenience - The VCTC, by written notice, may terminate this contract, in whole or in part, when it is in the Government's interest. If this contract is terminated, the Recipient shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of termination.

Termination for Default [Breach or Cause] - If the CONSULTANT does not deliver supplies in accordance with the contract delivery schedule, or, if the contract is for services, the CONSULTANT fails to perform in the manner called for in the contract, or if the CONSULTANT fails to comply with any other provisions of the contract, the VCTC may terminate this contract for default. Termination shall be effected by serving a notice of termination on the CONSULTANT setting forth the manner in which the CONSULTANT is in default. The CONSULTANT will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner of performance set forth in the contract.

If it is later determined by the VCTC that the CONSULTANT had an excusable reason for not performing, such as a strike, fire, or flood, events which are not the fault of or are beyond the control of the CONSULTANT, the VCTC, after setting up a new delivery of performance schedule, may allow the CONSULTANT to continue work, or treat the termination as a termination for convenience.

Opportunity to Cure (General Provision) - The VCTC in its sole discretion may, in the case of a termination for breach or default, allow the CONSULTANT [an appropriately short period of time] in which to cure the defect. In such case, the notice of termination will state the time period in which cure is permitted and other appropriate conditions

If CONSULTANT fails to remedy to VCTC's satisfaction the breach or default or any of the terms, covenants, or conditions of this Contract within [ten (10) days] after receipt by CONSULTANT or written notice from VCTC setting forth the nature of said breach or default, VCTC shall have the right to terminate the Contract without any further obligation to CONSULTANT. Any such termination for default shall not in any way operate to preclude VCTC from also pursuing all available remedies against CONSULTANT and its sureties for said breach or default.

Waiver of Remedies for any Breach - In the event that VCTC elects to waive its remedies for any breach by CONSULTANT of any covenant, term or condition of this Contract, such waiver by VCTC shall not limit VCTC's remedies for any succeeding breach of that or of any other term, covenant, or condition of this Contract.

6. SUBCONSULTANTS' CERTIFICATE REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY OR VOLUNTARY EXCLUSION

- A. The CONSULTANT shall include in each subcontract exceeding \$100,000, regardless of tier, a clause requiring each lower tiered subCONSULTANT to provide the certification set forth in paragraph B of this section. Each subcontract, regardless of tier, shall contain a

provision that the subCONSULTANT shall knowingly enter into any lower tier subcontract exceeding \$100,000 with a person who is disbarred, suspended or declared ineligible from obtaining federal assistance funds. If a proposed subCONSULTANT is unable to certify to the statements in the following certification, the CONSULTANT shall promptly notify City and provide all applicable documentation.

B. Each subCONSULTANT with a subcontract exceeding \$100,000 shall certify as follows:

SubCONSULTANT's Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

1. _____ ("subCONSULTANT") certifies, by submission of its proposal to _____ ("CONSULTANT"), that neither it nor its "principals" (as defined in 49 CFR 29.105(p)1 is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in contracts by any Federal department or agency.
2. If subCONSULTANT is unable to certify to the statements in the certification, subCONSULTANT has attached a written explanation to its proposal to the CONSULTANT.

7. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS AND RELATED ACTS

The CONSULTANT acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. 3801 et seq. And U.S. Department of Transportation (DOT) regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of this Contract, the CONSULTANT certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to this Contract or the FTA assisted project for which this Contract work is being performed. In addition to other penalties that may be applicable, the CONSULTANT further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program fraud Civil Remedies Act of 1986 on the CONSULTANT to the extent the Federal Government deems appropriate.

The CONSULTANT also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. 5307, the Government reserves the right to impose the penalties of 18 U.S.C. 1001 and 49 U.S.C. 5307(n)(1) on the CONSULTANT, to the extent the Federal Government deems appropriate.

The CONSULTANT agrees to include the above two clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subCONSULTANT who will be subject to the provisions.

8. INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The provisions in this Section (FTA Requirements) include, in part, certain Standard Terms and Conditions required by the U.S. Department of transportation (DOT), whether or not expressly set forth in the preceding provisions. All contractual provisions required by DOT, as set forth in FTA Circular 4220.1F, dated November 1, 2008 as it may be amended from time to time, are hereby incorporated in this Contract reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. The CONSULTANT shall not perform any act, fail to perform any act or refuse to comply with any requests of the City which would cause the City to be in violation of the FTA terms and conditions.

Heather Menninger, Principal
AMMA Transit Planning



2/01/2016