



# Transit Development Plan Major Update Draft Scope of Services

FINAL

May 2022

PREPARED FOR Indian River County

Contract Number

**Project Name:** Transit Development Plan Major Update

**Purpose:** To prepare a major update of the Transit Development Plan for Indian River for the planning horizon period of 2023 to 2032.

**Project Managers and Staff:**

**Deliverable(s):**

- Project Schedule
- Monthly reports & invoicing through project completion
- Working Group (internal) Meetings
- Draft Chapters
- Ten Year Improvement Program
- Board Presentations
- Draft TDP Plan
- Final TDP Plan
- Archive of Project Files

**Proposed Fee** \$160,240

## SCOPE OF SERVICES

A TDP is a multi-year plan required by the Florida Department of Transportation (FDOT) that calls for a description of the transit agency's vision for public transportation, along with an assessment of transit needs in the study area and a staged implementation program to set priorities for improvements. FDOT requires a TDP in order to maintain eligibility for state Block Grant funding.

This major update of the Transit Development Plan (TDP) shall incorporate a 10-year planning horizon beginning in FY 2023. It shall address the requirements of, and be consistent with, applicable Florida Department of Transportation (FDOT) regulations, all requirements of Florida Administrative Code Section 14-73.001 (revised and published in December 2006), and all requirements of Florida Statute 341.052.

The Transit Development Plan is also a policy document that integrates transit goals and objectives with those of other adopted plans, including the State Transportation Plan and other local government comprehensive plans. FDOT strongly encourages a strategic approach to the planning process and emphasizes the importance of public participation in the preparation of the Transit Development Plan.

The most recent Major Update of the Transit Development Plan (TDP) for Indian River was adopted in September 2019 with a planning horizon of FY 2019 – FY 2028. There have been annual updates since then and a major update is due by September 1, 2023. This task is to prepare a major update of the TDP for Indian River and extend the planning horizon to cover the period from FY 2023 to FY 2032.

### Objectives

To provide management, coordination and production of a Major TDP Update for Indian River Transit in compliance with Florida Department of Transportation (FDOT) regulations, all requirements of Florida Administrative Code Section 14-73.001 (revised and published in February 2020), all requirements of Florida Statute 341.052 and any relevant policies of MAP-21, the Federal Highway Administration and the transit agency.

- To develop a public involvement and outreach plan that emphasizes a customer orientation and provides Indian River with insight into the public's issues, needs and opinions;
- To organize a TDP that serves as a strategic business plan for the County to provide effective and efficient mobility services, establish transit goals, policies, and objectives to develop new services, to afford opportunities for new funding sources and partnerships, and to develop an implementation plan.
- To assess community and organizational stakeholders vision and opinion of public transportation, as well as, service expectations and level of support for improvements;

- To focus upon the relationships between public transportation and overall economic development;
- To coordinate the TDP short range strategic planning perspective with the Metropolitan Planning Organization's (MPO) long-range transportation plans as well as various local government mobility initiatives;
- To develop Goals, Objectives and Strategies resulting from all task activities and analyses, including a Peer and Trend Analysis of Indian River; and
- To create a goal-oriented work program management process based upon a five year operating and capital program that supports sound management decisions and prioritizes service improvements.

## Task 1: Project Management

### Establish a Project Management Team and TDP Working Group

At the onset of the project, the primary members of the Working Group will meet to discuss project issues, develop a detailed scope of work listing key work elements, and finalize a timeline for completion of key components of the project. Quarterly meetings will entail progress reports from CUTR detailing work completed to date, identification of outstanding issues, and scheduling forthcoming project work. CUTR will be responsible for the organization of the committee and for convening the scheduled meetings.

### Task Activities

- 1) CUTR will assign a Project Manager to coordinate all TDP tasks with the designated Study Project Manager of Indian River.
- 2) CUTR will manage the study to address schedule requirements and compliance with local, state and federal procedures throughout the process ensuring the completion and delivery of the final TDP. Upon Notice-To-Proceed, CUTR will develop a detailed project schedule for Indian River's approval. It is anticipated that this study will take twelve (12) months to complete.
- 3) CUTR will prepare periodic progress reports outlining project activities completed to date, including periodic invoices for services completed. These will include technical memoranda with approximate target dates based upon days from the formal Notice-To-Proceed (NTP).
- 4) CUTR will support Indian River in establishing a TDP Steering Committee made up of stakeholders to contribute and provide input to the development of the TDP and to review deliverables produced by CUTR. In consultation with Indian River, CUTR will identify and recommend persons from the following constituencies to participate in the Steering Committee:

- a) SRA Staff
- b) FDOT District Staff
- c) Indian River Staff

The Steering Committee is expected to have up to 5-6 members and hold progress and product review meetings every two to three months throughout the TDP update. These will incorporate the interactive component of the Public Involvement Plan as well as the TDLCB. CUTR will be responsible for preparing the agenda and materials for each meeting, with electronic versions sent to Indian River staff.

## Task 2: Public Involvement Program

To establish an overall TDP Public Involvement Plan (PIP) that ensures compliance with local, state and federal policies. It is expected that this PIP will mirror the one used in the 2019 TDP Update. Additionally, the PIP will seek to receive valuable public input to develop mobility options tailored for a full array of markets throughout the Indian River County service area.

Based on the approved MPO Public Involvement and Participation Plan, CUTR will draft and, following FDOT's approval, finalize a written Public Involvement Plan designed to involve transit riders, the general public and transit stakeholders in the TDP update. A special effort will be made to seek out and include minorities, low income, elderly and disabled populations. In addition, public meetings, workshops, and hearings will be provided at convenient times and locations in accessible venues.

The public involvement activities comprise multiple outreach activities to target specific user groups of the transit system, including community organizations with interests in public transportation, input from the general public, and existing users of the Indian River services.

### Task 2A – Establishment of Community Connections and Listening Sessions

CUTR, in collaboration with Indian River staff, will organize and maintain a master list of community organizations with interests in public transportation including government, business (chambers of commerce), social service agencies, charitable agencies, tourism, public and private education. When possible, CUTR will communicate with these community connections to inform and promote project phases and formal outreach activities.

### Task 2B – Survey of General Public via Paper & Website

CUTR will develop a survey instrument for the general public designed to probe attitudes towards transit, perceptions of transportation in Indian River County and the existing system, needed service enhancements, and factors that encourage or discourage transit use. Questions from the 2019 TDP Online Survey will be included. CUTR will enable distribution of the general public survey via social media platforms which will target respondents based on geographic location to ensure only Indian River County residents are surveyed. Additionally, the public survey will be linked to multiple other social media and web platforms of the County,

community partners, municipalities and the MPO. Indian River will be responsible for supplying all artwork related to Indian River County logos and color schemes.

#### Task 2C - Conduct On-Board Customer Survey

CUTR will conduct an onboard survey designed to properly represent the Indian River customers. Questions from the 2019 TDP On-Board Survey will be included. CUTR will use the results to gain insight into customer demographics, travel patterns, and preferences. Customer Survey data will be used to determine transit rider characteristics such as:

- Trip Origin (Address, Intersection, or Zip Code)
- Trip Destination (Address, Intersection, or Zip Code)
- Residence Zip Code
- Access Mode to Transit Route
- Other Route(s) or Services Utilization
- Gender
- Age
- Income
- Trip Purpose
- Transit Service Satisfaction

It is expected that the number of responses will be at or above the 750 responses that were received for the 2019 TDP On-Board Survey.

#### Task 2D – Conduct Stakeholder Interviews

CUTR will conduct structured interviews of major stakeholders representing Indian River County, transit contractors, municipalities, outside interest groups, customers, the regional workforce board and others identified by Indian River staff. Factors to be probed in the interviews will include:

- External trends that support or hinder transit such as:
  - Congestion
  - Parking
  - Land use changes, emerging activity centers
  - Socio-economic shifts
  - Fuel apple costs
  - Environmental Changes & Concerns
  - Funding
- Strengths & Weaknesses of Indian River’s Existing Services
- Barriers & Opportunities for improvements and/or expansion of services

### Task 2E – Operator Feedback Interviews

This task will include a summary of operator interviews. CUTR staff will ensure that relevant questions related to the TDP effort will be included in the interviews conducted as part of the Organizational and Operational Evaluation and Process Improvement Project, which will be conducted concurrently with the TDP effort. CUTR staff will include interview results in Task 2 of the TDP.

### Task 3 – Assessment of Existing Conditions

CUTR will collect relevant data to identify public transportation needs, based on potential customer markets, service characteristics and commercial and residential developments, and opportunities for strategic initiatives. These data will reflect the conditions and trends within the service area and will establish the operating environment. The assessment will help identify the mobility needs of the community.

Generalized Data Needs:

- Demographic
- Socio-Economic Data
- Land Use
- Population Growth
- Travel / Mobility Patterns
- Accessibility Component

### Task 3A – Land Use & Socio-Economic Data

CUTR will utilize U.S. Census American Community Survey (ACS) data to establish population and housing characteristics for Indian River. Other Census products such as the Longitudinal Employment Household Dynamics (LEHD) data will be used to establish employment and commuting patterns. These will be supplemented by other data maintained by Indian River and/or the MPO so that CUTR can develop GIS maps to portray:

- Population & Housing density patterns
- Employment density patterns
- Existing and Future Land Use
- Major Activity Centers (e.g., major employers, employment, educational, medical shopping, or recreational centers)
- Trip generators
- Age distribution
- Auto Ownership patterns / Vehicles per household
- TD population & potential TD populations
- Population or households at or below poverty level by block group map

## Task 4 – Performance Evaluation

This task will provide an overview of existing Indian River services and a performance review including a trend analysis and peer comparison for both the fixed route and demand response services

### Task 4A – Profile Existing Transit Service

CUTR will describe the service currently available in Indian River County, in narrative, tabular and graphic form, including:

- History & Institutional Arrangements
- Service Area
- Services Provided, including:
  - Fixed Route
  - Paratransit
  - Carpool & Vanpool
  - Other Public and Regional Transit services
- Service Levels
  - Hours & days of service by route
  - Route frequencies by day and time period
- Assets
  - Fleet & service vehicles by type & age
  - Major Equipment
  - Maintenance facility
  - Infrastructure – transit centers, shelters & bus stops, park-n-rides/  
walking/biking distance, accessibility component
  - Staffing, broken down by function (e.g., operators, supervisors, maintenance,  
administration)

### Task 4B – Transit Performance Measures

CUTR will compile data for the latest fiscal year and historical data since last major update. System-wide data and/or route-level data will be analyzed as appropriate. CUTR will develop transit performance measures based on the indicators listed in the table below (subject to review/revision by Working Group):

General Performance Indicators	Effectiveness Measures	Efficiency Measures
<ul style="list-style-type: none"> <li>• Passenger trips</li> <li>• Revenue miles</li> <li>• Revenue hours</li> <li>• Route miles</li> <li>• Operating expenses</li> <li>• Capital expenses</li> <li>• Operating revenues</li> <li>• Total employees</li> <li>• Vehicles available for maximum service</li> </ul>	<ul style="list-style-type: none"> <li>• Vehicle miles per capita</li> <li>• Passenger trips per capita</li> <li>• Passenger trips per revenue mile</li> <li>• Passenger trips per revenue hour</li> <li>• Average age of fleet</li> <li>• Revenue hours per employee</li> <li>• Passenger trips per employee</li> <li>• Quality of Service (revenue miles between vehicle failures)</li> </ul>	<ul style="list-style-type: none"> <li>• Operating expenses per capita</li> <li>• Operating expenses per passenger trip</li> <li>• Operating expenses per revenue mile</li> <li>• Operating expenses per revenue hour</li> <li>• Farebox recovery ratio</li> <li>• Revenue miles per vehicle</li> <li>• Revenue hours per employee</li> <li>• Passenger trips per employee</li> <li>• Average fare</li> </ul>

#### Task 4C – Develop Trend & Peer Group Analysis

CUTR will summarize historical trends for key performance, effectiveness and efficiency indicators drawn from the above measures. The period of analysis will be five years (or another similar period determined jointly by CUTR and Indian River). In addition, in consultation with the Indian River staff, CUTR will identify up to ten (10) peer systems based on comparable service area populations, fleet size, socio-economic, land-use and institutional characteristics (e.g., purchased service). A mix of Florida and out-of-state peer systems will be identified. The selection of peer agencies will be guided by *TCRP Report 141, A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry* and augmented by CUTR and Indian River staff’s knowledge and judgment. Data will be drawn from the National Transit Database (NTD) or other sources and summarized by CUTR.

In addition to the performance indicators listed in the above table, this analysis will benefit from seeing how a set of peer agencies perform across a number of additional measures relating to operations, finance, and organizational structure. Data to be used in this analysis will include, but not be limited to, the following areas:

- Organizational structure
- Employees by type
- Operating expenses by category
- Maintenance expenses by category

- Administrative expenses by category
- Source of funding

These additional data will be compiled from NTD as appropriate, but any items not available in NTD can be collected by contacting individual peer agencies, as needed. The peer review analysis will include a description of the methodology and data used, a series of data tables and graphics to illustrate the data, and a written analysis of the information. The results of this analysis will be used as an input into the Organizational and Operational Evaluation and Process Improvement Project, which will be conducted concurrently with this TDP.

## Task 5 – Situation Appraisal

This task will examine the degree to which community and other plans are supportive of transit in the overall planning environment. This task includes a forecast of transit demand using FDOT’s approved tool, the Transit Boardings Estimation Simulation Tool (T-BEST).

### Task 5A – Review Related Plans and Transit Environment

CUTR will review the effects of the following as they relate to the transit system in Indian River County, including:

- assessment of institutional and governance issues
- local, state and regional plans and actions
- land use/growth management policies and programs
- organizational issues
- existing and proposed ITS technologies

CUTR will make an assessment of the extent to which land use and urban design patterns in Indian River County’s service area support or hinder the efficient provision of transit service, including any specific efforts by local land use authorities to foster transit development.

CUTR also will review and summarize related plans & policies including:

- Comprehensive plans, including Capital Improvement Elements, for Indian River County, Cities of Fellsmere, Roseland, Sebastian, Vero Beach and Wabasso, and other local governments.
- Development of Regional Impacts
- Long Range Transportation Plan & Vision Plan
- Transportation Improvement Program
- FDOT Work Program
- Regional Policy Plan/Joint planning w/adjacent counties
- Coordinated Public Transit & Human Services Plan
- Transportation Disadvantaged Service Plan (TDSP)
- Florida Transportation Plan

- Modal plans for bicycle and pedestrian networks
- Park & Ride, Parking management plan(s)
- ITS planning and new technology deployment, e.g., alternative fuels, automated vehicle location (AVL) and traveler information systems, signal priority for transit, safety, security & electronic fare collection systems.

CUTR will also conduct an assessment of the transit environment through a review of existing and future land use maps, aerials, and a limited field survey to determine land use patterns, emerging developments, and urban design characteristics and their impact on transit.

#### Task 5B – Ten-Year Forecast of Transit Demand

In accordance with Rule 14-73.001, CUTR will utilize the Transit Boardings Estimation Simulation Tool (T-BEST) to forecast ridership over a ten year period using several improvement scenarios. CUTR will review trip patterns from the T-BEST model’s base year and future year travel demand. CUTR will then utilize the T-BEST model to test various service improvement scenarios such as improvements to existing services and new services in new service areas. The demand for transit service over the next ten years will be determined from model outputs and any changes to the underlying demographics and development pattern of the transit service area. CUTR may also consider factors such as trip-making patterns exhibited by the County’s Transportation Disadvantaged (TD) population, to the extent such data is available from the coordinated system. Demand forecasts from T-BEST are but one tool to determine future service improvements.

#### Task 6 – Update of Policy Framework and Goals and Objectives

This task will assimilate all of the previous tasks to develop goals, objectives and performance measures to guide future transit service plans and plan initiatives.

From the preceding tasks, and with the participation of the Steering Committee, CUTR will recommend updates to the following policy documents:

- Agency Vision Statement (e.g., the ideal future)
- Mission Statement (e.g., organizational purpose, activities, & values)
- Goals, Objectives & Strategies
- Performance Standards & Monitoring based on the established goals and objectives.

#### Task 7 – Definition & Evaluation of Alternatives

This task will define and evaluate alternatives for service improvements to be programmed for the ten-year planning period. Alternatives will be evaluated for highest ridership potential, community need/demand, cost effectiveness, and will consider improvements to existing service, new service areas and new service types.

Based on the preceding Strategic Assessment, Performance Evaluation and Updated Policy Framework, CUTR will develop alternative future transit scenarios. These will be developed in a

Charrette (brainstorming workshop) during stakeholder interview, public workshops, survey or online tool like metroquest and may be related to alternative funding scenarios. The alternatives will be developed in tabular and graphic form and encompass:

- Alternative Service Designs, and may focus on one or more of the following:
  - Upgrading the existing fixed-route system (span & frequency of service)
  - Expanding fixed-routes to provide more connectivity
  - Extending coverage to more areas
  - Making regional connections
  - Consideration of new service types (e.g. providing flex-route service to lower density area or activity center circulators)
  - ADA service changes to complement fixed-route expansion
- Capital and Operating needs including:
  - Fleet Requirements
  - Facilities
  - Transit Infrastructure

The alternatives will be evaluated by their effectiveness in achieving the approved Goals & Objectives, order-of-magnitude costs, and further public input. The Steering Committee will be asked to rank and select a preferred alternative to use as the basis for the Ten-Year Action Plan.

## Task 8 – Ten-Year Action Plan

### Task 8A – Ten Year Implementation Program Report

CUTR will prepare a report for the next ten years (FY 2023 to 2032) consisting of narrative, tables and graphics to summarize the selected alternative. The report will outline the process and input used to develop the plan, including goals, objectives, strategies, performance standards and policies. The report will be written in non-technical language and include supporting graphics and maps to enhance its readability. The report will provide a monitoring program for the Goals and Objectives with measures against which each objective and strategy can be compared for future annual updates.

### Task 8B – Financial Plan

Based on the preferred alternative, CUTR will prepare financial tables for a ten-year projection of the following:

- Operating expenses based on projected vehicle hours and/or miles of service
- Operating revenues based on projected funding by source
- Capital expenses based on:
  - Fleet replacement schedules, maintenance and expansion needs

- Transit Capital improvement Program of fixed assets such as facilities, transit centers, shelters
- Support vehicles, equipment replace/upgrades
- Special initiatives such as ITS deployment
- Capital funding based on projected grant sources, local match requirements, private sector sources

Expenses and revenues will be presented in present day and year of expenditure figures. All assumptions and sources for funding and costs will be fully documented.

### Task 9 – Review & Adoption by Indian River County Board of County Commissioners/Endorsement by the MPO

With approval from the Indian River staff, presentations are proposed with the Board of County Commissioners (BoCC) and the MPO committees (Technical Advisory Committee, Citizens Advisory Committee, and MPO Board) to provide the appropriate level of review and approval. These will occur at major milestones (or combined milestones) in the schedule to gain approval for:

- Plan Goals & Objectives
- Future Transit Alternatives
- Final Plan Adoption

Indian River staff will be responsible for the final adoption by the BoCC after appropriate presentations have been made. CUTR will prepare all agenda and presentation materials for distribution by the Indian River staff and participate in presenting them to the BoCC.

# Budget

Project Title: Indian River TDP											
Duration of Project: 12 Months											
Staff Member	Hours & Fully Loaded Rate	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7	Task 8	Task 9	Totals
		Project Management	Public Involvement Program	Assessment of Existing Conditions	Performance Evaluation	Situational Appraisal	Update Policy Framework and Goals	Definition & Evaluation of Alternatives	10-Year Action Plan	Review and Adoption of Plan	
Martin Catala	445	32	75	75	75	40	60	40	40	8	
	\$82.99	\$2,655.68	\$6,224.25	\$6,224.25	\$6,224.25	\$3,319.60	\$4,979.40	\$3,319.60	\$3,319.60	\$663.92	\$36,930.55
Jodi Godfrey	375	15	75	35	80	75	0	40	40	15	
	\$66.40	\$996.00	\$4,980.00	\$2,324.00	\$5,312.00	\$4,980.00	\$0.00	\$2,656.00	\$2,656.00	\$996.00	\$24,900.00
Austin Sipiora	252	0	0	0	0	76	76	60	40	0	
	\$42.16	\$0.00	\$0.00	\$0.00	\$0.00	\$3,204.16	\$3,204.16	\$2,529.60	\$1,686.40	\$0.00	\$10,624.32
Jason Jackman	170	20	110	0	0	20	20	0	0	0	
	\$55.84	\$1,116.80	\$6,142.40	\$0.00	\$0.00	\$1,116.80	\$1,116.80	\$0.00	\$0.00	\$0.00	\$9,492.80
Victoria Perk	140	0	20	35	40	0	15	15	15	0	
	\$92.10	\$0.00	\$1,842.00	\$3,223.50	\$3,684.00	\$0.00	\$1,381.50	\$1,381.50	\$1,381.50	\$0.00	\$12,894.00
Melisa De Leon	250	40	74	0	40	40	40	0	0	16	
	\$42.41	\$1,696.40	\$3,138.34	\$0.00	\$1,696.40	\$1,696.40	\$1,696.40	\$0.00	\$0.00	\$678.56	\$10,602.50
Graduate Research	150	0	150	0	0	0	0	0	0	0	
	\$25.00	\$0.00	\$3,750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,750.00
Subtotals Labor	Hours	87	374	110	195	231	176	140	120	39	1472
	Salary & Benefit	\$ 6,465	\$ 26,077	\$ 11,772	\$ 16,917	\$ 14,317	\$ 12,378	\$ 9,887	\$ 9,044	\$ 2,338	\$ 109,194
<b>Other Expenses</b>											
Materials and Supplies		250	250	\$250	\$1,000	\$500	\$0	\$0	\$0	\$500	\$2,750.00
Subcontractor		0	0	\$0	\$0	\$10,000	\$0	\$0	\$0	\$0	\$10,000.00
Consultant		0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
Equipment		0	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0.00
Travel		500	2400	\$0	\$500	\$500	\$500	\$500	\$498	\$850	\$6,248.00
Other Expenses (Please specify)											\$0.00
Expense Subtotals		\$750	\$2,650	\$250	\$1,500	\$11,000	\$500	\$500	\$498	\$1,350	\$18,998.00
<b>Totals</b>											
Subtotal of All Expenses		\$7,215	\$28,727	\$12,022	\$18,417	\$25,317	\$12,878	\$10,387	\$9,542	\$3,688	\$128,192.17
Indirect Costs (25% Total Direct)		\$1,804	\$7,182	\$3,005	\$4,604	\$6,329	\$3,220	\$2,597	\$2,385	\$922	\$32,048
<b>Total Project Cost</b>		<b>\$9,018</b>	<b>\$35,908</b>	<b>\$15,027</b>	<b>\$23,020</b>	<b>\$31,646</b>	<b>\$16,097</b>	<b>\$12,983</b>	<b>\$11,926</b>	<b>\$4,610</b>	<b>\$160,240.21</b>
Notes:											
This will be a fixed priced, lump sum contract and invoiced quarterly based upon percent complete.											
Additional CUTR staff may be required and used within the limits of the fixed price budget.											