



WORKING PAPER 1: PROJECT MANAGEMENT PLAN

SOUTHWEST VALLEY LOCAL TRANSIT SYSTEM STUDY

Prepared by



December 21, 2011



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Appendix A Scope of Services



I. INTRODUCTION

The Southwest Valley Local Transit System Study is an effort to assess the transit service needs within a multi-jurisdictional subarea of the Maricopa Association of Governments (MAG) region. The study area includes portions of the City of Phoenix, City of Avondale, City of Goodyear, City of Tolleson, City of Litchfield Park, and Town of Buckeye. Transit service within and to the jurisdictions within the study area is operated or planned by Valley Metro RPTA, METRO, and the City of Phoenix. The key outcome of this study will be a local transit system plan that outlines short- and long-term goals and actions to implement transit service within the study area and also connects to the regional system.

The purpose of this Project Management Plan (PMP) is to provide a management tool to guide the study and as an informational overview for project participants and interested parties. The PMP describes the overall approach for the study in terms of the overall goals and scope for the study; the study area boundaries; the management team, responsibilities, and lines of communication; and schedule. The PMP is intended to be a flexible document, and the management team implementing the PMP may develop more detailed working procedures in the context of the day-to-day management of each function or task as needed.



II. STUDY GOALS AND OBJECTIVES

The overall intent of the study is to evaluate local mobility needs and lifeline/safety net requirements within the study area, produce a local transit system plan, and provide a roadmap for implementing and funding such service.

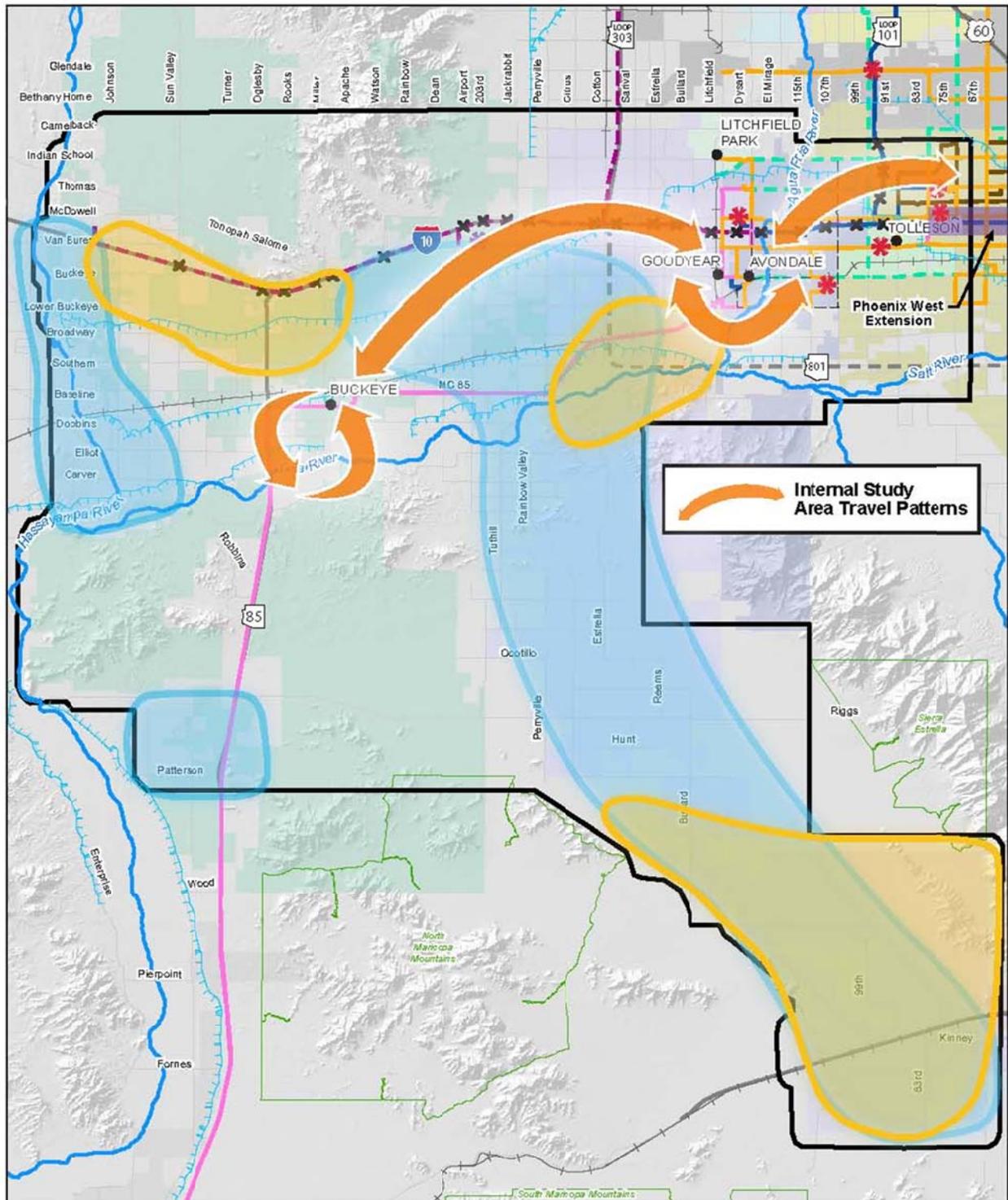
GOALS	<ul style="list-style-type: none"> • Provide new and enhanced transit service options to the Southwest Valley for both internal and regional travel • Provide transit service options that better suit the specific characteristics of the various market types in the Southwest Valley, including ease of use, reduced travel times, minimized transfers, and enhanced accessibility and amenities • Develop a transit service network that further complements and supports near- and longer-term transit improvements, including regional services
OBJECTIVES	<ul style="list-style-type: none"> • Enhance the attractiveness of transit by providing the quickest possible service with minimal need to transfer • Provide enhanced internal community circulation connecting major activity centers with visible high frequency service • Improve accessibility and performance of regional services into and out of the study area • Integrate regional and community circulation services via provision of collection and distribution loops that minimize transfer and overall travel times • Provide accessible transit services to higher density residential and employment locations • Improve transit station and vehicle amenities to attract new traveler markets to transit • Provide a near-term building block toward a more comprehensive level of regional HCT services to the Southwest Valley

III. STUDY AREA

The proposed study area includes parts of the jurisdictions of Phoenix, Avondale, Goodyear, Buckeye, Tolleson, Litchfield Park, and Maricopa County. Figure 1 illustrates the study area boundary, as well as the general travel patterns and anticipated growth areas for population and employment. The study area encompasses a variety of land use types including urban, suburban, and rural development patterns. The jurisdictions within the study area have experienced rapid population growth over the last decade, and are projected to continue to add population and employment. Based on the analysis of travel patterns conducted during initial tasks, the study area boundary or an influence area of important connections to the study area may be refined.



Figure 1: Study Area



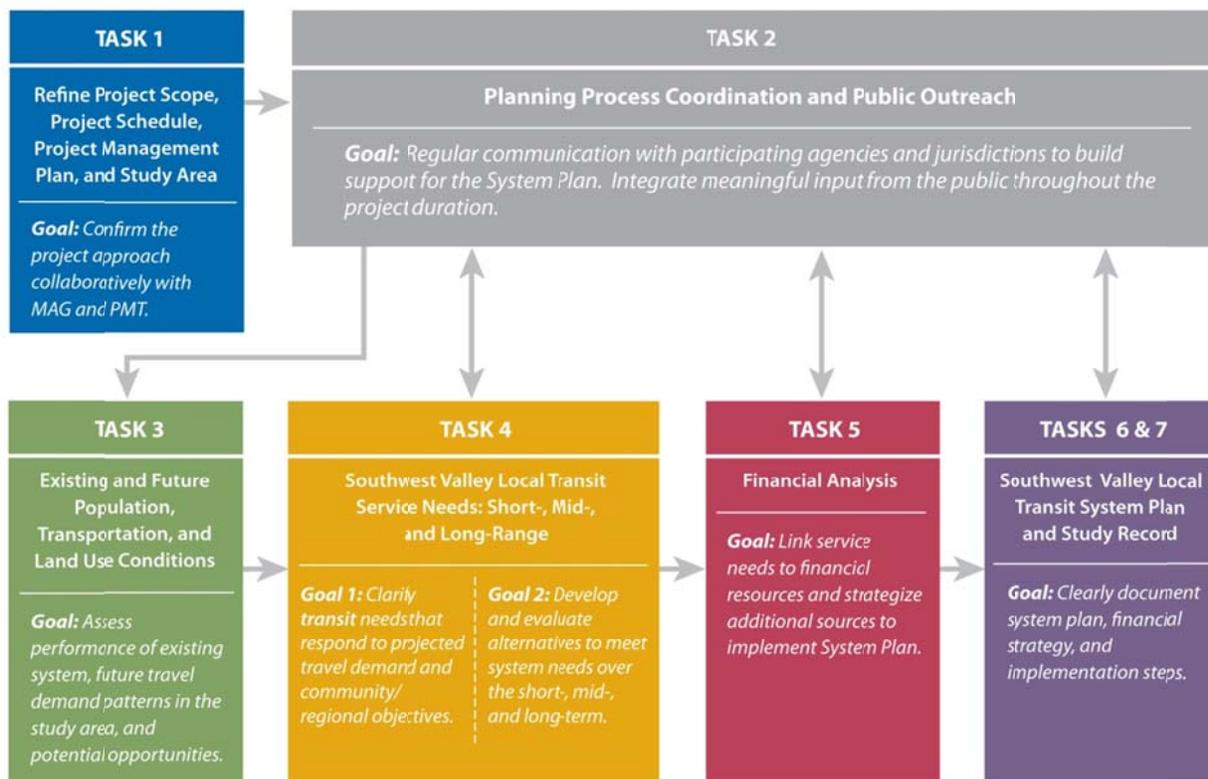
Source:
Base Map: ALRIS 1997 - 2010, ADOT 2009
Routes: MAG 2010



IV. TECHNICAL APPROACH

For a description of the Scope of Work please refer to Appendix A of this document. Figure 2 summarizes the intent of the primary tasks. As part of Task 1, MAG and the URS Consultant Team will collaborate with the Project Management Team (PMT) to refine and finalize the Scope. The URS Project Manager will be responsible for outlining the approach to each primary task or study product to guide the efforts of the team. A separate Public Involvement Plan has been prepared to detail study outreach activities, including an online survey, Local Transit Summit, and social media.

Figure 2: Key Study Tasks



Collaboration with the PMT will be a critical component of the study. The PMT is comprised of representatives of the stakeholder jurisdictions and the agencies that operate or plan for transit in the study area (as listed in Table 1). Overall direction for the project is provided by MAG. The PMT shall provide project management oversight, insight into policy and stakeholder coordination, and technical review of the study products. The PMT will meet bimonthly; Table 2 highlights how the PMT meetings will relate to project milestones.



Table 1: Project Management Team Members

Agency / Jurisdiction	Contact	Email
Avondale	Kristen Sexton	ksexton@avondale.org
Buckeye	Jose Heredia	jheredia@buckeyeaz.gov
Goodyear	Cato Esquivel	cato.esquivel@goodyearaz.gov
Litchfield Park	Sonny Culbreth	sonny@litchfield-park.org
Phoenix	Connie Randall	connie.randall@phoenix.gov
Tolleson	Reyes Medrano	rmedrano@tollesonaz.org
Maricopa County	Mitch Wagner	mitchwagner@mail.maricopa.gov
RPTA	Stuart Boggs	sboggs@valleymetro.org
METRO	Abhishek Dayal	adayaal@metrolightrail.org
MAG	Jorge Luna	jluna@azmag.gov

Table 2: Anticipated Topics for PMT Meetings

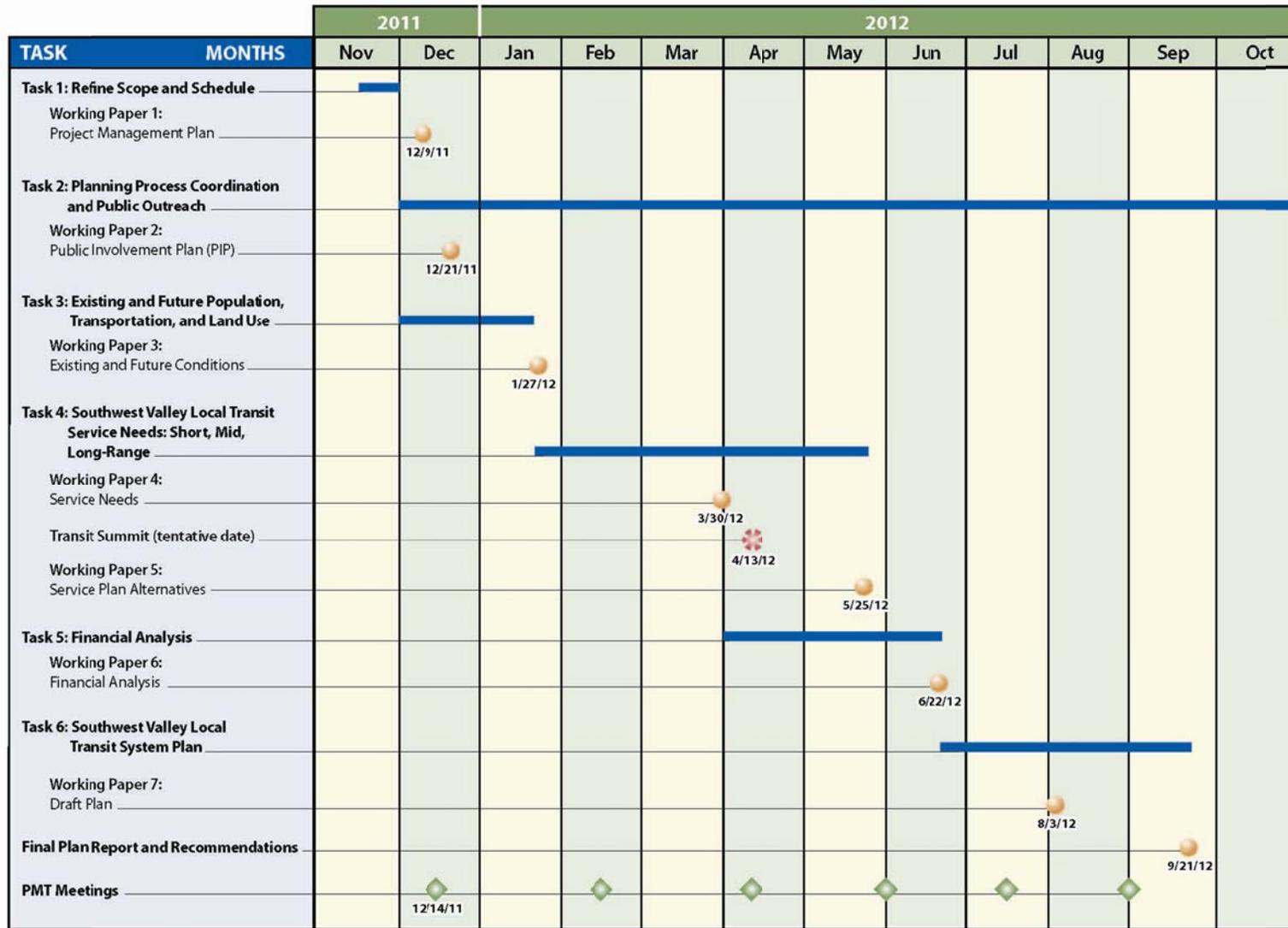
Date*	Topic
December 14, 2011	Kick-off meeting: Scope of Work and Study Area; discuss expectations for the study; review Public Involvement Plan; overview of preliminary travel patterns analysis.
February 2012	Review of existing and future conditions; travel markets and issues.
April 2012	Service needs assessment; planning for Local Transit Summit.
May/June 2012	Report results of Local Transit Summit; service plan alternatives.
July 2012	Financial analysis of service alternatives.
August/September 2012	Discussion of Draft Local Transit System Plan.

*Dates subject to change.

The schedule for completion of the study is shown as Figure 3. The study will be completed within 12 months, by November 2012.



Figure 3: Schedule



● Work Products ❀ Transit Summit ◆ PMT Meetings



V. PROJECT TEAM ORGANIZATION

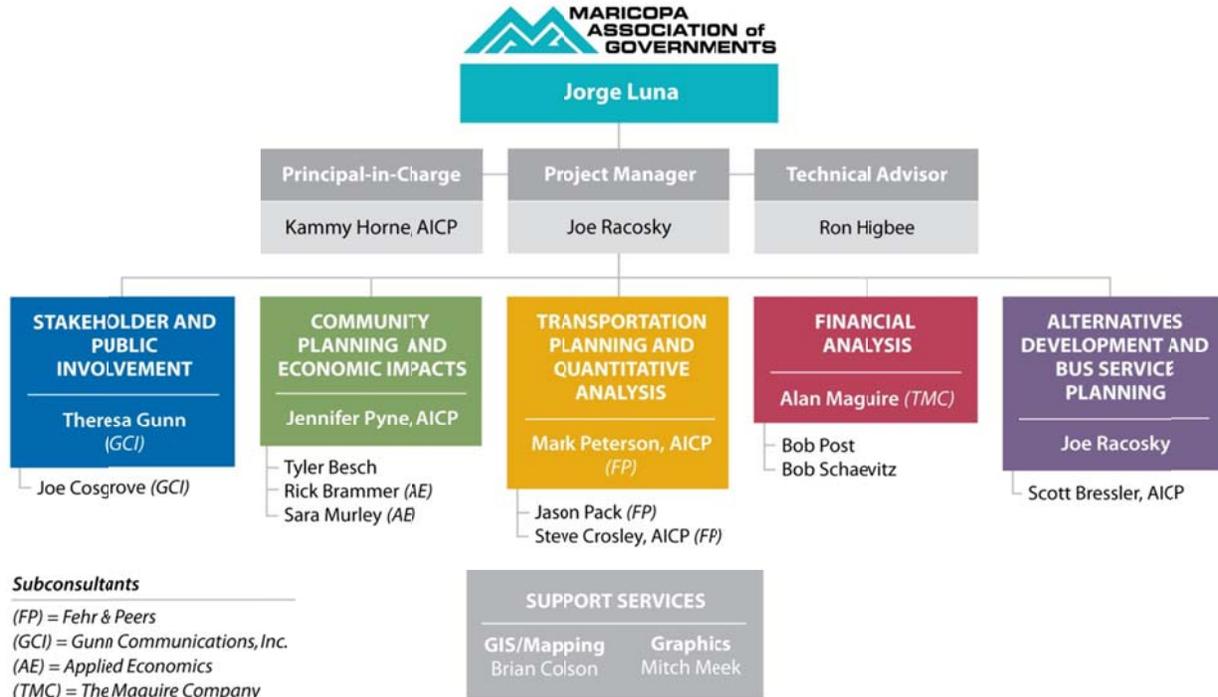
This study will be overseen by MAG’s Project Manager, Jorge Luna. The URS Consultant Team is comprised of URS and four subconsultants, as shown in Figure 4. The primary point of contact for the URS Team is Project Manager, Joe Racosky or Jennifer Pyne. Contact information and project roles for the key members of the Project Team are provided in Table 3.

Table 3: Project Team

Name	Agency/Firm	Project Role	Contact Information
Jorge Luna	MAG	Project Manager	602.452.5037 JLuna@azmag.gov
Joe Racosky	URS	Consultant Project Manager Alternatives Analysis and Bus Service Planning	303.888.7523 (cell) Joe.racosky@urs.com
Jennifer Pyne, AICP	URS	Deputy Project Manager, Community and Transit Planning	602.648.2335 (ofc) 480.612.7422 (cell) Jennifer.pyne@urs.com
Mark Peterson, AICP	Fehr & Peers	Transportation Planning and Quantitative Analysis	619.234.3190 m.peterson@fehrandpeers.com
Rick Brammer, AICP	Applied Economics	Economic Impact Analysis	602.765-2400 x103 rbrammer@appliedeconomics.net
Alan Maguire	The Maguire Company	Financial Analysis	602.840.6400 Alan@AEMaguire.com
Theresa Gunn	GCI	Public Involvement	623.512.7486 tgunn@gciaz.com
Kammy Horne, AICP	URS	Principal-in-Charge	602.648.2389 (ofc) Kammy.horne@urs.com



Figure 4: Organizational Chart



VI. COMMUNICATION AND COORDINATION

Jorge Luna will be the primary contact for this study at MAG, and Joe Racosky will be the primary point of contact for the URS Consultant team. Media and public communication will be conducted through MAG. Public communications via the stakeholders participating on the PMT will be coordinated through specific contacts as discussed during the PMT kick-off meeting and as described in the Public Involvement Plan.

Any news media or public-initiated contacts should be referred to MAG’s Project Manager, Jorge Luna.

VII. PROJECT MANAGEMENT

Quality Control

URS has established a Quality Assurance Program to set quality guidelines for project activities. The URS Quality Assurance Program is guided by a Quality Assurance/Quality Control (QA/QC) manual and by supplementary plans, procedures, and instructions describing quality assurance guidelines and organizational responsibilities for implementing these guidelines. The URS



Project Manager is responsible for assuring project compliance with these procedures and guidelines.

Key elements of the QA/QC process for this study are described below:

- Develop Project Management Plan. This plan (Working Paper #1) provides the overall steps for executing the project, assigns personnel roles and responsibilities, identifies the schedule, and develops the communication protocols and coordination requirements throughout the process to all project team members and subconsultants.
- Perform Detail Checking. All information in a deliverable given to a client is verified for editorial precision and completeness by a Senior Professional who is independent from the originator of the document. The Senior Professional will be a part of the project team and familiar with the project; the appropriate individual will be identified for each deliverable depending on the content and level of technical detail.
- Perform Independent and Technical Reviews. Prior to submission to the client, all substantive work performed or identified as a significant deliverable shall undergo an independent technical review (ITR) to verify the quality and integrity of the project tasks and written work products, to verify that the deliverables are in accordance with the scope of work and to verify compliance with the standard of professional practice.

Reviewers will be identified by the Project Manager or Deputy Project Manager. Deliverables completed by subconsultants will be reviewed by the URS Project Manager, Deputy Project Manager, or designated reviewer prior to submittal to MAG.

Budget and Cost Control

The Consultant Team Project Manager will be responsible for managing each phase of the project budget. Budgets for each task will be established and managed by all team members. Task budgets and status-of-task completion data will be summarized for monthly reporting to the MAG Project Manager.

Changes in scope must be prepared in writing and agreed to by both MAG and URS. Any modifications or additions to the original scope or budget authorization must be in writing by MAG.

URS will prepare monthly progress reports. URS will be responsible for developing and maintaining all scheduling, cost estimating, budgeting, cost tracking, reporting, and forecasting



systems. Work progress, schedule, and budget status will be documented on a monthly basis in a report to MAG.

VIII. DOCUMENTS AND DELIVERABLES

All deliverables will be submitted to the MAG Project Manager by URS, either in hard copy format or through electronic means such as e-mail or an ftp site. Subconsultants will not submit written documents or communications to MAG without prior approval from the URS Project Manager or designee. To the extent practical, all project deliverable graphics and reports will be developed and distributed electronically.

No member of the project team or the PMT will release study materials or deliverables to any agency, organization, or person without prior written authorization from the MAG Project Manager. All requests for such information should be directed to the URS Project Manager or Deputy Project Manager, who will coordinate the requests with the MAG Project Manager, as appropriate.



Appendix A

Scope of Services

APPENDIX A

SCOPE OF SERVICES

MARICOPA ASSOCIATION OF GOVERNMENTS (MAG)

SOUTHWEST VALLEY LOCAL TRANSIT SYSTEM STUDY

I. WORK PLAN AND TASKS

The purpose of this Section is to outline the major tasks required to be performed by the CONSULTANT in order to produce the needed analyses and deliverables to MAG. All work will be performed under the general direction of the MAG project manager. Any staff modifications to the project shall be approved by the MAG project manager.

Task 1. Refine Scope of Services, Project Schedule, Management Plan, Management Team and Study Area

For this Task, the CONSULTANT will produce a detailed work plan, project management plan, establish the Project Management Team (PMT), and hold a kick-off meeting to refine Scope of Services and study area. The detailed work plan will include elements such as a project statement clearly identifying the study goals and objectives, project staff tasks and duties, a detailed description of project tasks and deliverables, refined project and meeting schedules, public outreach meetings, etc. The project management plan will include elements such as the project organization, quality assurance/quality control, document preparation and standards, budget and cost control, and process for review and adoption/acceptance of study recommendations and findings, including the final transit plan, etc. The CONSULTANT and the MAG Project Manager will provide continuous support to the PMT. The CONSULTANT will hold a kickoff meeting and will present the draft scope and schedule to the PMT for comment and input before it is finalized. Standing PMT meetings will be scheduled for every other month. This Task also includes refining the study area. The study area may change based on feedback throughout the project.

Task 2. Public Involvement Plan (PIP)

Under this Task, the CONSULTANT will engage staff from the various agencies, stakeholders, and the general public in the planning process. This Task will help gauge the opinion of existing transit service as well as identify what the current and future needs are in order to develop a phased local transit system that connects to the regional system. Supporting activities for this Task include creating and maintaining a project email listserv (list serve sources include PMT agencies, interested organizations, etc.), support material for the project websites and social media portals (websites and media portals in cooperation with member agencies, as allowed) that will also serve for feedback and project updates, and a minimum of two (2) project fact sheets or newsletters highlighting the study purpose, schedule, ways to get involved, events, progress, etc. (all both in English and Spanish).

This Task includes preparing an implementing a proactive public involvement program that takes into account ongoing public involvement in related planning studies and other activities. The program must provide opportunities for obtaining input from and presenting study findings to Southwest Valley

residents (including Spanish speakers and communities of concern such as Title VI), elected officials, city staff, transit customers, the business community, etc. The PIP will include, at a minimum, the following elements, which after completed, will be analyzed, summarized, and delivered:

- A three (3) week online survey to assess the need for transit in the study area as well as help to identify important activity centers, preferred service frequency, preferred alignments, general opinions about the Southwest Valley Local Transit System Plan, a willingness to pay for service, etc. Ample survey pre-notification through the listserv, social media, websites, and local media will be required to ensure participation. For residents without internet access, the CONSULTANT will provide three (3) opportunities for face-to-face interactions, such as public meetings, at major destinations and will pay particular attention to transit dependant areas and populations of concern such as Title VI communities.
- The CONSULTANT will interview pertinent stakeholder agency staff and other entities as suggested by the MAG project manager and the PMT in order to assess the full range of issues and opportunities for transit service in the study area.
- A Southwest Valley Transit Summit. See Task 4 for additional information.
- A summary or findings briefing plan for each of the involved jurisdictions, one for each elected body, and attendance at briefings as necessary. The briefing plan should include schedules, content, structure, presentation materials, etc.

Task 3. Data Collection - Existing and Future Population, Transportation, and Land Use Conditions

The CONSULTANT will perform a peer review as well as collect, evaluate, and summarize pertinent existing and future data as necessary to determine the market need for the subarea's short-, mid-, and long-range transit options. The CONSULTANT will collaborate with the project manager and the PMT to identify and collect data and will confirm planning and land use objectives within each community. This Task will include Geographic Information System (GIS) data collection and preparation of base and projection maps of the study area. Data such as:

- Transit studies and existing and planned transit service in the subarea.
- Demographic and socioeconomic data.
- Existing and planned land uses, activity centers, transportation and transit plans, and local planning objectives as well as subarea, regional, and state level objectives relevant to this study. MAG travel demand forecast data.
- Review of best practices and strategies of local transit systems.
- General Plans and Transportation Plans of the involved jurisdictions.

The CONSULTANT will also perform and deliver an inventory transit infrastructure of the study area (e.g. bus stops, transit centers, park and rides, pedestrian accessibility, etc.).

Task 4. Southwest Valley Local Transit Service Needs: Short-, Mid-, and Long-Range

The CONSULTANT, using the data from Task 3, will perform a subarea assessment and determine the phased transit needs for the short-, mid-, and long-range timeframes. This Task is divided into two (2) Subtasks. Subtask 4A focuses on the assessment of transit needs, problems, and goals, and Subtask 4B includes the process for assembling and evaluating alternatives to address those factors. Results from Task 4 will be used in the Transit Summit proposed in Task 2. Activities will include the following components:

- Subtask 4A - Assessment of transit needs, problems, and goals. The purpose of this Subtask is to identify existing and future transit service needs and issues in the project study area and to develop a set of service goals, objectives, and performance standards to guide the subsequent plan development process. Key Subtasks will include a performance assessment of existing and planned transit services, an overall market assessment of both near-term and long-term transit needs and opportunities, and development of goals and service objectives.
 - ◆ The CONSULTANT will perform an assessment of existing and planned transit services and, with the data from Task 3, will identify any existing deficiencies and recommend improvements. The CONSULTANT will also identify the time frames or planning horizons. The CONSULTANT, through feedback from the MAG project manager and PMT, will develop the short-, mid-, and long-range timeframe or planning horizons. Examples of planning horizons are market targets such as population, employment, density, etc.
 - ◆ Using the data collected in Task 3, the CONSULTANT will perform a market assessment and will define the universe of transit needs and opportunities for the timeframes or planning horizons of the study area in relation to growth and development, various densities, commute patterns, travel demand, stakeholder/transit operator/public input, etc. In addition, the CONSULTANT will identify existing and projected transit needs and opportunities by market type. Each market type will be quantified and described in terms of the following: market size (including the number of existing users and trip types by purpose, e.g., work, shopping, etc.); travel shed (including the origin and destination patterns of user trips and land use densities); and socioeconomic characteristics (including demographic data of users such as income levels, household size, and auto availability). The CONSULTANT will also perform an analysis of opportunities at the community level relating to transit-supportive land use actions. The CONSULTANT will identify opportunities at the community level relating to transit-supportive land use actions such as increasing residential and employment densities, enhancing the mix and diversity of land uses, and transit accessible design.
 - ◆ Goals and Service Objectives. A set of study goals and service objectives will be established to guide the overall plan development process. The study goals and service objectives will be reviewed by the MAG project manager, the PMT, stakeholders, and the public. The developed goals and service objectives should focus on:
 1. Early Action (Existing/Immediate): Primarily relating to the issues and findings from the performance assessment of existing services.

2. Short-Term (Efficiency): Identification of service needs and opportunities in short-term. Assumes no changes in regional high capacity transit (HCT) in or near the study area.
 3. Mid-Term (Growth): Identification of service needs and opportunities in the mid-term. Possible emerging changes in HCT in or near the study area.
 4. Long-Term (Sustainability): Identification of service needs and opportunities in the long-term. Assumes changes in HCT in or near the study area.
- ◆ Determine performance standards for the proposed plan looking at items such as performance indicators like those found in the Regional Public Transportation Authority's (RPTA) Annual Transit Performance Report. Also, develop a service evaluation plan for meeting, outperforming, or addressing underperforming service and for scaling back or expanding service.
- Subtask 4B Evaluation and Alternatives Development. This Subtask is designed to bridge market-based needs identified in Subtask 4A with the financial analysis and plan recommendations in Task 5 and Task 6, respectively. The purpose of this Subtask is to develop the initial service plans by applying a rationale for their development and refinement. These initial service plans will address the options for making existing or planned service more efficient, identifying market-based plans for the various timeframes/horizons, and identifying the lifeline level of service for the various timeframes. The initial service strategies will address the following elements:
 - ◆ Development and refinement of an evaluation process. The evaluation process will work with the goals and objectives for each time frame based on the market based needs from Subtask 4A. Trip purpose, market size (quantification), and geographic and temporal aspects of the travel markets will also be characterized. The goals, objectives, and needs will be converted into criteria in the evaluation process. Other considerations and constraints will also be incorporated into the evaluation process to “brake” the alternatives development in terms of affordability, cost effectiveness (productivity), and equity among the communities.
 - ◆ Development and refinement of the building blocks for alternatives development. Building blocks for transit alternatives development are often described in terms of service types. Service types cover aspects such as routing configuration and length, stop spacing, frequency, time span, vehicle size, and other supporting infrastructure elements. The study will review the various service types and will recommend the appropriate service, keeping in mind, among several things, federal compliance.
 - ◆ Alternatives development and application of an approach for improving transit service efficiency. The efficiency analysis will examine the route productivity of the existing and planned routes in the Southwest Valley and compare them to other peer routes within the entire Valley, as well as with peer routes in other cities and data obtained from Tasks 2 and 3, and Subtask 4A. Routes whose productivity appears to be lagging will be analyzed for methods of improvement by modifying routing, frequency, and time span of service.

- ◆ Refinement of the time frame or horizons and alternatives development for the service strategies noted above. The timeframe or horizon-focused service plans will be developed to meet the market-based needs identified in the evaluation criteria while also being constrained by affordability, productivity, and equity factors. An assessment of the existing and planned routes in the Southwest Valley against the project evaluation criteria will provide a baseline for the alternatives development effort. Initial alternatives for each time frame or planning horizons (short, medium, and long) will be developed by examining the quantitative spatial and temporal aspect of the various market-based needs, and applying the various transit service types to address those needs. Iterative application of the evaluation process against the service plans will serve to suggest ideas to improve and refine the alternatives. Costs of each alternative will be estimated for capital and operating/maintenance. Ridership will be estimated using a combination of regional travel model capabilities and route-level service planning knowledge. The initial alternatives will be complete when evaluation iterations results in no further ideas for improvements. Lifeline aspects of each alternative and for each phase will be identified as well.
- Southwest Valley Transit Summit (to be coordinated with Task 2). The purpose of the summit is to understand and collectively build consensus on the needs and wants of the transit markets in the study area. The summit would include presentations on items such as existing and future trends (population, transportation, land use, etc.), the online survey from Task 2, how this and other studies work together, etc. The summit will review and discuss the information, scenarios, and proposed recommendations of Task 4. The summit will help to identify items such as the plan's timeframes or planning horizons, the needs of various transit markets, etc. The CONSULTANT will cover all costs related to the summit.

Task 5. Financial Analysis

The CONSULTANT will conduct a financial analysis for the service options developed in Task 4 including preliminary costs and funding sources. The analysis will include the following components:

- Funding requirements, including annual capital and operating costs. The capital cost estimate will include the initial capital requirements of the specific system, additional capital costs associated with any phasing of the system implementation, and repair and replacement capital costs. An annual operating cost estimate will be developed for support staff, maintenance, operation of the service, etc.
- Funding strategies, sources, and opportunities, including local funding options for the transit plan. Using the potential funding sources, the study will develop a series of alternative funding strategies to implement the service plan. The timeframes for these options will be linked to the variety of lead times for improvements identified in the service plan.

Task 6. Southwest Valley Local Transit System Plan

The CONSULTANT will prepare a draft and a final comprehensive, phased, and market-based Southwest Valley Local Transit System Plan and an executive summary of the Plan (the executive summary should be both in English and Spanish). The Plan should balance the service requirements for the short-, mid-, and long-term needs from Task 4 with the financial analysis of Task 5. The Southwest Valley Local Transit System Plan will include components for each phase such as:

- Existing service efficiency recommendations.
- Transit service operator and the mode/s to be employed.
- Routing alignments, service levels, and required infrastructure (e.g. bus stop locations).
- Equipment choices and service operators.
- Operating strategies, including:
 - ◆ Management and governance, coordination and cooperation with connecting transit services, maintenance plan, performance measures, service evaluation plan, etc.
- Funding needs and strategies/options.
- Identification of appropriate demographic or horizon thresholds for service implementation.
- The lifeline level of service for each phase.
- Implementation timetable for the public transportation services. This task will outline the strategies or tasks needed to be performed by the individual jurisdictions, the subarea, and if applicable the region, in implementing the transit plan identified in this study. This timetable will include recommended benchmarks for implementing each of the recommended service components and the preceding steps required for each component. These steps will include such items as:
 - ◆ Final selection of component service parameters, application for funding, receipt of funding, construction of guideways and other structures as needed, ordering of equipment, receipt of equipment, initiation of operating strategies, service inauguration, intergovernmental agreements, etc.

Task 7. Study Record

Assemble all final products from the study tasks into a complete study record.

II. DELIVERABLES

The products of this project are listed below. All Working Paper and Final Documents will build from the Tasks listed in this scope. An administrative draft of each working paper will be submitted in both electronic and hard copy formats to the MAG project manager for review. Comments from the MAG project manager will be incorporated into the working paper by the CONSULTANT, before it is distributed for external review.

Task 1. Refine Scope of Services, Project Schedule, Management Plan, Management Team and Study Area.

1. Summary minutes of project kickoff meeting (electronically submitted).
2. Summary minutes of every PMT meeting (electronically submitted).

3. Working Paper 1 – Refine Scope of Services, Project Schedule, Management Plan, Management Team, and Study Area (10 (ten) bound copies each of draft paper and final working paper).

Task 2. Public Involvement Plan (PIP)

1. Email listserv.
2. Materials and updates for project websites to be continuously updated throughout the study.
3. Materials and upgrades for social media portals to be continuously updated throughout the study.
4. Project initiation and pre-survey Factsheet/Newsletter No. 1 (200 (two hundred) copies, in color).
5. Online survey notification text, press release, and media advisory.
6. Online survey.
7. Technical memorandum: online survey report.
8. Working Paper 2 - Public Involvement Plan (10 (ten) bound copies each of draft paper and final working paper).

Task 3: Data Collection - Existing and Future Population, Transportation, and Land Use Conditions.

1. Technical memorandum: Review of Peer Cities and Best Practices for Building a Local Transit System, Data Summary, and Transit Infrastructure Inventory.
2. Working Paper 3 - Existing and Future Population, Transportation, Travel Demand, and Land Use Conditions (10 (ten) bound copies each of draft paper and final working paper).

Task 4: Southwest Valley Local Transit Service Needs: Short-, Mid-, and Long-Range

Subtask 4A:

1. Technical memorandum: Goals and Objectives for the Various Planning Horizons.
2. Working Paper 4 - Southwest Valley Local Transit Service Needs: Assessment of Existing Transit Service, Market Needs and Operations by Market Type, defined timeframes/planning horizons, performance indicators, and service evaluation plan (10 (ten) bound copies each of draft paper and final working paper).

Subtask 4B:

1. Technical memorandum: Existing Service Efficiency Evaluation.
2. Technical memorandum: Timeframe/planning horizons, Market Needs Evaluation Process, and Alternatives Development Process.

3. Transit Summit: agenda (200 (two hundred) copies), venue, breakout team working materials, presentation boards (minimum of eight (8) foam core boards, with each board measuring no smaller than 40 (forty) inches by 30 (thirty) inches, in color), food for Summit participants, etc.
4. Technical memorandum: Summit report with executive summary.
5. Working Paper 5 - Service Plan Alternatives.

Task 5: Financial Analysis

1. Technical memorandum: Preliminary cost estimates.
2. Working Paper 6 - Financial Analysis (10 (ten) bound copies each of draft paper and final working paper).

Task 6: Southwest Valley Local Transit System Plan

1. Working Paper 7 - Draft Southwest Valley Local Transit System Plan (10 (ten) bound copies each of draft paper and final working paper).
2. Final Southwest Valley Local Transit System Plan Report and Recommendations (50 (fifty)) bound copies in color, Southwest Valley Local Transit System Service Plan Factsheet/Newsletter #2 - 1,000 (one thousand) copies in color).
3. Electronic presentation (PowerPoint) of plan, development process, timeline, key findings/recommendations, and an electronic summary sheet of the recommendations.

Task 7: Study Record

1. Compilation of all electronic and hard copy study working papers, documents, and reports.

III. SCHEDULE

It is anticipated that the project will commence on or about November 1st, 2011, and be completed by October 31, 2012. Technical memorandums are due before submittal of the Working Papers.

TASK NO.	TASK	SCHEDULE FOR COMPLETION
1	Working Paper 1 - Refine Scope of Services, Project Schedule, Management Plan, Management Team, and Study Area.	December 1, 2011
2	Working Paper 2 - Public Improvement Plan.	Continuously throughout the project. Working paper due December 9, 2011.
3	Working Paper 3 - Existing and Future Population, Transportation, Travel Demand, and Land Use Conditions.	January 20, 2012

4A	Working Paper 4A - Southwest Valley Local Transit Service Needs: Assessment of Existing Transit Service, Market Needs, and Operations by Market Type, defined time frames/planning horizons, performance indicators, and service evaluation plan. Working Paper 4B - Service Plan Alternatives.	4A - March 30, 2012
4B		4B - May 25, 2012
5	Working Paper - Financial Analysis.	June 22, 2012
6A	Working Paper 6A - Draft Southwest Valley Local Transit System Plan.	6A - August 3, 2012
6B	Working Paper 6B - Final Southwest Valley Local Transit System Plan.	6B - September 21, 2012
7	Study Record.	October 31, 2012

IV. CONSULTANT WORK TEAM

The CONSULTANT will form a work team of key personnel (as named below) to perform the project. Other labor requirements will be filled by other staff members of the CONSULTANT.

KAMMY HORNE will serve as the Principal-in-Charge and will primarily be responsible for overseeing the project and ensuring quality control. JOE RACOSKY will serve as the Project Manager and will be responsible for the overall management of the project and will also serve as the Alternatives Development and Bus Service Planning lead. THERESA GUNN will oversee the public involvement portion of the study, including development and execution of the survey instrument. JENNIFER PYNE will serve as the Community Planning and Economic Impact Lead and will perform Land Use and Transit-Oriented Development Analysis. MARK PETERSON will serve as the Transportation Planning and Quantitative Analysis lead; he will oversee the transportation and land use conditions modeling of the study. ALAN MAGUIRE will serve as the Financial Analyst; he oversees development of the financial plan and list of potential funding sources and strategies.