

AC Transit Realign – Scope of Work for Requested Change Order No. 2

Project Description

At its January 24, 2024 Board meeting, the AC Transit Board of Directors moved to “extend the Realign process by 6 months, to refine the draft plan to eliminate disparate impacts on equity priority communities, to cease study of using non-union operators in our service area, and to approach ATU (AC Transit’s bus operator union) about another general sign-up, and to return to the board to advice and consult with us on this issue within the next 3 months.”

AC Transit staff is proceeding on a project timeline that enables March 2025 implementation of either the entire plan or a portion of the plan.

AC Transit requests a second change order and a proposal for additional work that provides sufficient resources to complete the original scope of work proposed by the Kittelson and Associates team, adapted with modifications that reflect feedback and direction from the AC Transit Board of Directors and associated project timeline changes, organized by task in this document.

Contract Extension

AC Transit requests a six-month contract extension through June 30, 2025. The original task order was slated to end on December 31, 2024 to account for the possibility of minor schedule delays and any project close-out needs following the originally proposed August 2024 plan implementation timeframe. Contract extension through June 30, 2025 will allow for implementation to begin in March 2025 and comfortably facilitate any project close-out needs.

Task 1: Project Management

The consultant team will ensure that adequate resources are budgeted to facilitate continued project check-in meetings and technical advisory committee meetings over the extended project schedule as part of existing tasks 1C and 1D, per below.

- C. The consultant will **facilitate regular check-in meetings** (at least monthly) with the AC Transit Project Management Team (PMT), and will be responsible for developing agendas, taking notes, and sending out action items after each meeting.
- D. **Facilitate advisory committees for internal and external stakeholders.** The consultant will continue facilitating technical advisory committee meetings at key decision points in the project. The consultant will facilitate an additional two technical advisory committee meetings (one corresponding with each additional plan revision), including any applicable supporting materials in both digital and print formats, which could include flyers, display boards, PowerPoint presentations, and/or interactive digital maps.

Task 1 Deliverables in addition to existing scope of work –meeting agendas for regular check-in meetings, committee participant lists, draft advisory committee meeting schedules and associated topics, and materials supporting advisory committee meetings.

Task 6: Develop Final Service Plan (with additional sub-task C)

The consultant team will ensure that adequate resources are budgeted to facilitate the following new sub-task within the extended project schedule, in addition to the yet-to-be-completed Task 6B (Conduct Title VI and CEQA analyses).

- C. Provide **supplemental technical assistance in support of AC Transit staff revisions to Draft Final Plan Scenario**. AC Transit staff will assume primary responsibility for future revisions of the plan and associated analysis that incorporates feedback from key stakeholders, the general public, and the AC Transit Board of Directors.

AC Transit staff will develop additional service concepts based on the Draft Final Plan Scenario already developed by the consultant team that are responsive to Board feedback from the January 24, 2024 meeting and the significant public feedback already solicited as part of the first three phases of Realign. At the March 13, 2024 Board Meeting, AC Transit staff will present these options and solicit clear direction from the Board about service allocation priorities, including acceptable trade-offs that allow for investment in service reliability, network coverage, and frequent service needs (see Proposed Schedule section of this document).

Clear direction from the Board at the March 13th meeting will be pivotal as AC Transit staff revises the plan again for a short public feedback window of two weeks in advance of public meetings to be held in late May or early June. AC Transit staff will revise the plan once again in response to feedback collected in this short feedback window and bring a second revised plan to the Board for public hearing in August 2024 with the goal of implementation in March 2025.

For each fully fleshed-out plan proposal brought forward (one for presentation in late May/early June 2024 and one for presentation in August 2024), AC Transit staff will produce spreadsheet matrices of each individual route recommendation like those produced by the consultant team in previous Realign phases and enter the corresponding information into the Remix software platform.

The consultant will review all AC Transit staff-produced documents provided, provide detailed feedback on the individual route proposals contained within, evaluate the recommendations and corresponding matrices for accuracy to verify cost assumptions are reasonable, review each plan component and written descriptions to ensure they are accurate and written in language digestible to non-technical audiences. The consultant will detail findings in concise, informal memos for each document.

The consultant will also review plan components inputted by AC Transit staff in the Remix software package for each individual recommendation to ensure the data entered in Remix is consistent with other plan materials. The consultant will review and document any issues, including assumptions for individual route alignments, varying service patterns, spans of service, frequency, and runtime by time of day and day type (Weekday/Saturday/Sunday) on a route-by-route, route pattern-by-pattern basis

to ensure that the data housed in Remix is suitable for access modeling purposes. The consultant will detail findings in concise, informal memos for each plan alternative reviewed.

The consultant will also make a Senior Planner available for optional bi-weekly brainstorming sessions to assist AC Transit staff in developing new plan alternatives.

Task 6 Deliverables in addition to existing scope of work – Quality Assurance/Quality Control Memos for First Revised Draft Final Service Plan Proposal, Quality Assurance/Quality Control Memos for Second Revised Draft Final Service Plan Proposal

Optional: Bi-Weekly Brainstorming Sessions

Task 7: Develop Updated Service Standards (with schedule modifications)

*This task is to be delivered in full per the original scope, but with the schedule for deliverables adjusted according to the **Proposed Schedule** section (below).*

Task 8: Community Outreach, Communications, and Public Engagement

- B. Conduct **targeted outreach and engagement around project milestones**, keeping stakeholders (defined in Task 8C) abreast of project developments and affording opportunities for stakeholder participation.

Phase 4 – Draft Service Plan Preview:

The consultant team will lead a minimum of 5 pop-up outreach events at community locations, promoting and driving a preview element that will be added to the Phase 4 project timeline. These will be outdoor events that will be held rain or shine. These in-person events led by the consultant team will be turnkey and staffed primarily by consultant team members along with volunteer District staff. Sufficient up-front preparation for each event will ensure that the consultant team has necessary resources that may be needed for events, including, but not limited to talking points and physical collateral for distribution. The five events will be confirmed by AC Transit with logistics and staffing coordinated by the consultant team.

Key tasks associated with leading pop-up events include the creation of logistics informational sheets/communications for each pop-up event that identify and ensure full in-person consultant/staff coverage at outreach events and the completion of comprehensive summary engagement reports that detail the number of contacts and content covered during interactions with those encountered during outreach. Branded canopy and table set-up will be required for pop-up events at community outdoor venues, which will require set-up and tear-down logistics, and tabling staffing. All outreach events for Phase 4 are to be implemented within the scheduled engagement window.

Phase 4 – Draft Final Service Plan (Call for Public Hearing)

The consultant team is not tasked with any outreach activities for the Phase 4 Public Hearing process that will occur in summer and fall 2024.

The consultant will use this time to compile and document all community outreach and public engagement activities qualitatively and quantitatively, preparing engagement summary reports for phase 4 and 5 with pictures documenting activities that will be included in Phase by Phase Engagement reports, and a comprehensive Final Engagement Report. Delivery of timely invoices, itemizing budget expenses by subtask and balance is required, along with budget projections for the next monthly invoice period.

- D. **Coordinate with AC Transit staff on the use of community-based organizations (CBOs)** to support grassroots outreach and engagement, setting aside dollars in the budget for this purpose.

The consultant will facilitate and coordinate an additional 10 CBO Hosted events as part of the Preview step for feedback from harder to reach communities. The consultant will conduct pre-event logistics for these community events including advance scheduling and preparation for each scheduled event, timely completion of summary engagement reports and tracking for each event, and with photos to memorialize each event. The consultant will provide interpreter support and all related logistical support prepared and coordinated with the Deputy Project Manager in advance to ensure a successful meeting. The consultant will confirm the meeting date, time, and location at least four weeks in advance of the meeting date, and set meeting agendas, presentation materials, and format two weeks in advance of the scheduled event.

The consultant will provide staff to moderate the discussion at each event to ensure event participants understand route proposals and that they can share their feedback on the draft proposal, while keeping the meetings on time. Sufficient up-front preparation for each event will ensure that the AC Transit team is provided with any necessary logistical information and/or resources that may be needed for events. The consultant will include a budget for meeting refreshments, attendance incentives, interpreter accommodations and accessibility accommodations, of which specifics will require approval from the AC Transit Deputy Project Manager. These outreach events are to be held during the designated engagement window for Phase 4, tentatively scheduled for May 15 through June 5.

The consultant team will facilitate two additional meetings of the Lived Experience Advisory Group (LEAG). There will be two meetings expected to occur during Phase 4 in Spring/Summer 2024. Each meeting will be supported by the AC Transit Deputy Project Manager and AC Transit Project Manager and will be timed to be held closely with the Technical Advisory Committee (TAC) meetings. Facilitation will include arranging and confirming interpreters, scheduling hybrid meetings, confirming, and reconfirming attendance of LEAG members along with serving as moderator, note taker and logistics coordinator of these meetings. The consultant will provide lunch for in-person LEAG member participants. AC Transit Project Manager and Deputy Project Manager will be the main presenters of these meetings. The consultant will process stipends for participating LEAG members

in a timely fashion, only once there is confirmation of their participation. One make-up session will be held at least 60 minutes in advance of the next scheduled meeting. If there are members unable to fulfill the balance of this extended Realign LEAG term, notify the deputy project manager immediately and provide an alternate recommendation to replace the vacancy from the vetted list.

Consultant will manage timely payment of LEAG stipends while also monitoring and itemizing a running total of CBO expenses as part of invoicing. Additional budget allowance for staffing make-up sessions should be itemized in your proposal. We do not need makeup sessions for Meeting #3 due to the pause and retooling of Phase 4 plan proposal.

Phase 5 includes a final joint meeting of the LEAG and CBO Partners to introduce the new service plan, thank them for their partnership, and this last ask to help us share the changes and expression of gratitude with their communities. This meeting will be held via Zoom.

E. Produce collateral materials to support outreach, communications, and engagement in both digital and print formats.

The consultant will develop draft strategic messaging and collateral documents in advance of Phase 4 presentation of a single draft service plan preview and public hearing solicitation and in advance of Phase 5 project implementation that will guide marketing and promotions as AC Transit implements a new service network.

The consultant will produce the specific deliverables listed below, which do not require creative design. The consultant is being asked to deliver drafts that the District will edit and lay out (design).

1. High level messaging for phases 4 (two-parts) and 5 drafts – this messaging will form the basis for promotional and informational messaging that can be used across all communication channels. See examples from Realign phases 1 through 3.
2. Realign Webpage update draft – promotions (post 3/13/24 Board Meeting update in early April 2024)
3. Realign Webpage update draft – preview of draft service plan (Spring [May] 2024)
4. Realign Webpage update draft – public hearing process/draft Final Service Plan (Summer [Aug] 2024)
5. eNews draft communications (a minimum of 5 releases)
6. Develop a Realign FAQ that will reside on the Project webpage and maintain the “frequently asked questions” FAQ for phases 4 through 5. The consultant will create an FAQ document for public consumption in response to questions frequently asked over the course of the project and keep the document continually updated. This document will reside on the Realign project webpage and will be delivered by Circlepoint with feedback from other members of the project team.
7. Social Media posts drafts (3-4 messages)
8. Create fact sheet content drafts:

- a. One (1) high level fact sheet for Phase 4 Preview
 - b. Four (4) high level fact sheets for Phase 4 Public Hearing Process by Planning Area
 - c. Twenty (20) fact sheets for service changes by city (13) (Oakland and Berkeley will require multiple fact sheets due to density of service areas.)
9. One (1) Public Hearing brochure for Phase 4 Public Hearing process – content 1st draft
 10. Statement summary drafts for line changes (as many as 50) for Phase 5

These documents will reside on the Realign project webpage and will also be made available in print formats for outreach event activities. The expectation is that the consultant will develop the draft content for each collateral piece and will not be responsible for graphic design.

The consultant will provide translation of any applicable collateral materials into Spanish and Chinese in both Cantonese and Mandarin.

The consultant will produce route profiles in PDF form for digital and print reproduction based on matrices produced by AC Transit staff. The matrices provided by AC Transit staff will be formatted similarly to those produced by the consultant team in previous plan phases, with key vital statistics about each route proposal, frequencies, spans of service, and other relevant key details. The Consultant will handle translation needs on a turnkey basis for both the matrices and corresponding route profile documents and provide translated versions of the matrices in line with what was provided by the consultant in earlier project phases. The consultant will also produce relevant maps and copy at system-wide and subarea map geographies that will help AC Transit staff communicate changes in each plan revision, the proposed changes relative to existing service and previously proposed plan scenarios to its communities. The consultant will also provide AC Transit with Adobe Creative Suite-compatible templates for the route profiles and ArcGIS templates for any associated maps.

F. In-person and/or Digital Public Meeting Logistics

The consultant will provide logistical and back-end support for at least one additional Districtwide Realign Workshop via Zoom webinar. This support will include creating a run-of-show logistics document that will script all event components, including content, interpreter logistics, and staff presentation timelines. The consultant team will be prepared to provide behind-the-scenes staffing support during the webinar similar to what was provided during the workshop held in Phase 3 of Realign. Facilitation support, subject to AC Transit's needs, may include live facilitation by the consultant team of a question-and-answer session with AC Transit staff, monitoring real-time engagement key performance indicators, including number of participants, number of questions asked, and documenting key themes. The consultant will also take photos of the event and/or provide screen captures as applicable and complete a comprehensive event summary using the Survey Monkey tool link created from project engagement summary reporting. The Kittelson project manager will be available to assist as a webinar panelist, with no additional consultant team members needed to serve as panelists.

Task 8 Deliverables in addition to existing scope of work

- Individual Route Profiles for each plan revision
- Maps of existing and proposed service for the different planning sub-areas of the AC Transit district, including frequency and network coverage maps. Phase 5 will require maps of existing and proposed service for each city (13) along with dense service areas for the cities of Berkeley and Oakland broken out into 4-6 smaller areas for no more than 20 profiles that include frequency and network coverage maps.
- Phase 4 Engagement: a) 10 CBO-hosted community meetings/events, b) At least 2 Lived Experience Advisory Group (LEAG) meetings, c) At least 5 pop-up outreach events at community outdoor venues, d) produce outreach summary reports for each event hosted and supported by the consultant, e) Logistical and backend support for up to two digital workshops, f) produce Phase 4 Outreach and Engagement report that includes a draft plan preview and public hearing solicitation of a final draft plan; and g) development of communication drafts to support promotions and information sharing of Realign with riders and public. All public comments received as part of the public hearing process need to be captured as one PDF with an executive summary (spreadsheet) capturing the list of comments received to be included as part of the appendices.
- Phase 5 Engagement: a) Convene one virtual meeting with LEAG members and CBO partners to introduce new service plan, b) produce outreach summary reports for each event hosted and supported by the consultant, C) produce Final comprehensive engagement summary/close-out report that includes summaries of Phases 1, 2, 3, 4 (two parts) engagement gathered from all outreach activities, and Phase 5 Outreach and Education for implementation of new service.
- Engagement Reports: Like Phase 3 Engagement report preparation, create an outline and schedule for Engagement Reports for Phase 4 and Phase 5 and the Final Comprehensive report in advance for AC Transit review and response allowing for at least a 2-week review and response window. This will be coordinated with the Deputy Project Manager.
- Messaging/Communications drafts for Phases 4 and 5:
 - High level messaging for phases 4 (two-parts) and 5 drafts
 - Realign Webpage update draft – promotions (post 3/13/24 Board Meeting update)
 - Realign Webpage update draft – preview of draft service plan (Spring [May] 2024)
 - Realign Webpage update draft – public hearing process/draft Final Service Plan (Summer [Aug] 2024)
 - eNews draft communications (a minimum of 5 releases)
 - Develop and maintain a Realign FAQ
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 - Create fact sheet content drafts:
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 - Twenty fact sheets for service changes by city (13), Oakland and Berkeley will require multiple fact sheets due to density of service areas.
 - Public Hearing brochure for Phase 4 Public Hearing process – content 1st draft
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Proposed Schedule

Date	Activity
February 26, 2024	Consultant begins Task 7 (Service Standards) work
March 13, 2024	AC Transit Board Meeting – two matters: A) Regular Matters - Board Action Item by AC Transit staff identifying cost-neutral thematic changes to plan that reflect board feedback B) Consent Calendar – Contract Change Order #2 Amendment
April 10, 2024	AC Transit staff submits revised version of Draft Final Service Plan for AC Transit staff review following March 13, 2024, board feedback
April 10, 2024	AC Transit staff submits draft service standards document for staff review
April 26, 2024	Service Plan Materials (in Final Form) due to MarCom for Production
May 1, 2024	Consultant provides AC Transit staff with Draft Service Standards Document
May 1 - 8, 2024	Start Public promotions and outreach announcements “Revised Draft Plan Proposal Coming May 15 th”
May 8, 2024	Ads on buses and in media/community outlets begin posting
May 15, 2024	Public Release of Draft Service Plan / Public Outreach preview window opens (3 Weeks) – Official public launch (print/digital/in-person outreach)
May 23, 2024	AC Transit Realign Workshop via Zoom – Updated Draft Service Plan Review/Q&A (Public)
June 5, 2024**	Hold Open House in the AC Transit General Office Lobby
June 5, 2024**	Special AC Transit Board Meeting – Realign workshop to discuss revised service plan prior to moving to the start of the public hearing process; present draft service standards for Board review and comment.
June 5, 2024**	Draft Revised Service Plan Engagement window closes
June 2024	Refine Draft Service Plan incorporating Board and public feedback
July 2024	Prepare & Route Board Report for Aug 7
August 7, 2024	AC Transit Board Meeting: Board sets public hearing dates; Staff presents updated draft Service Standards Policy for board approval
August 7, 2024	Draft Final Service Plan Public Comment period opens
September 9, 2024	AC Transit Realign Public Hearing (staff-led) – 6pm
September 10, 2024	AC Transit Realign Public Hearing (staff-led) – 9am
September 11, 2024	AC Transit Realign Public Hearing (Board-led) – 2pm
September 11, 2024	AC Transit Realign Public Hearing (Board-led) – 6pm
September 11, 2024	Draft Final Service Plan Public Comment period closes
October 9, 2024	AC Transit Board Meeting: Board votes on final service plan
October 10, 2024, thru March 30, 2025	Implementation Activity Begins (scheduling, sign-up, training, communications, education/outreach, promotions)
March 9, 2025	March 2025 Implementation*

*Pending ATU side letter agreement for an additional general sign-up in March 2025.

** Special Board Meeting Date is proposed and pending confirmation of a Board quorum.