

BART Agreement Number: 6M6137

Approval Date: 02/28/24

Work Plan No. A.16-01 FTA TOD Pilot Task 6: 'Richmond/El Cerrito TDM Implementation Plan

Scope:

Part 1 – Richmond / El Cerrito TDM Implementation Plan

Staff at BART and the Cities of El Cerrito and Richmond seek consultant assistance with preparing a Transportation Demand Management (TDM) Implementation Plan (Plan). The Plan will include an existing conditions analysis, goal confirmation and setting, and an organizational and financial analysis.

Study timeframe: This scope assumes a 12-month project duration (mid-September 2023 through mid-September 2024).

Task 1: Project Management

This task consists of calls and meetings needed to coordinate the study team.

The Consultant PM will be responsible for QA/QC of all deliverables prior to submission. This will include “gut checks” on all work, analysis, and modeling in particular.

Task 1.1 File Management

Consultant will create a shared Microsoft Sharepoint document to track meeting agendas and notes and a task tracker to track decisions and completed tasks.

Task 1.2 Kickoff Meeting

To initiate the project, Consultant will coordinate a kickoff meeting focused on confirming the work plan. The goal of the kickoff meeting is to build rapport between consultants and agency staff, understand communication preferences and approaches, and reach a clear and common understanding of the work to be conducted and project management structure. Communication and document review protocol will also be covered.

Task 1.3 Bi-weekly Meetings

This task will assume bi-weekly (every other week) meetings with BART and the two cities, with other agency staff joining (such as WCCTAC) from time-to-time, as-needed. 26 meetings are assumed.

Deliverable 1.1 – Kick-off meeting with agenda and meeting notes.

Deliverable 1.2 – Biweekly meetings with agenda and meeting notes. Shared PM agenda doc at least 2 days prior to meetings, meeting notes up to 1 day after meeting, updated task tracker.

Task 2: Data Collection

Consultant will identify and collect data necessary to complete the scope of work.

Task 2.1 Plans and Policies

Consultant will identify and collect data on relevant existing plans and policies, which may include:

- Richmond First/Last Mile Plan
- Richmond Bay Specific Plan
- San Pablo Avenue Specific Plan
- Cities of Richmond and El Cerrito General Plans
- BART Berkeley-El Cerrito Corridor Access Plan (BECCAP)
- El Cerrito Plaza Station Access Plan

Task 2.2 Ordinances and Regulations

Consultant will identify and collect data on relevant existing ordinances and regulations, which may include:

- City of Richmond TDM Ordinance
 - Information on who is required to comply with the TDM ordinance and how compliance is enforced
- WCCTAC and County TDM regulations
- San Pablo Avenue Specific Plan TDM requirements

Task 2.3 Population, Employment, Demographic, and Travel Data

Consultant will identify and collect population, employment, demographic, and travel behavior data. Much was collected for El Cerrito as part of BECCAP (and will be reused to extent possible) but data will need to be collected for Richmond. Census data collected for BECCAP will also be updated to the latest available data. Data may include:

- Data on BART mode of access; access mode by distance from the stations
- Ridership data from Richmond Moves and Gotcha
- Demographic breakdown of ridership by station
- Census data on journey to work
- Residential and employment densities
- Locations of equity priority communities
- Locations of Priority Development Areas and planned and proposed future developments in each city

Task 2.4 Employer-specific Data

Consultant will identify and collect employer-specific data. Cities of Richmond and El Cerrito will provide this data. Data may include:

- Employer-specific data – major local employers, industries, number of employees and location (cities to provide)

Task 2.5 Existing Spending

Understanding that the vision for the future of TDM will not be entirely clean slate, but will be built off recent and ongoing investments in TDM, Consultant will collect data on current spending on TDM (on annualized basis), performing some independent research with private businesses or other agencies as part of this task. Consultant will also use information provided by the working group members (for jurisdictions that they represent) as well as existing TDM programs (Richmond Moves and Gotcha), if available. The data on current spending will feed directly into the development of the Financial Analysis in Task 7 rather than Task 4 Existing Conditions Analysis.

Task 3: Convene Staff Working Group

Consultant will convene a staff working group. The purpose of the staff working group is for working group members to provide clarity on the vision and objectives of this effort, and to periodically review progress and guide next steps. Participants are anticipated to include staff from BART, City of Richmond, City of El Cerrito, and Contra Costa 511/WCCTAC. BART will determine working group members.

Task 3.1 Milestone Meetings with Working Group

This scope assumes five milestone meetings with the working group. Meetings are assumed to be virtual. Consultant will develop a PowerPoint presentation for each meeting, and attend a rehearsal for each meeting.

The first meeting is a working group kickoff meeting covering the following topics:

- Refine scope and timeline, as needed
- Confirm project understanding (as drafted above)
- Confirm list of existing data and documents to consider

The objective of the second meeting, which will follow shortly after the first, is two-fold:

- to develop a consensus vision for TDM implementation in El Cerrito and Richmond, establishing the purpose and goals for any future organization(s) that will oversee these.
- share the results of Task 4 Existing Conditions Analysis.

At the third meeting, Consultant will share findings from Task 5 Case Studies and Literature Review and Task 6 TDM Goals and Strategies Analysis.

At the fourth meeting, Consultant will share findings from the organizational analysis within Task 7, and the working group will provide input on selecting a recommended organizational structure for financial analysis.

At the fifth meeting, Consultant will share findings from the financial analysis for the recommended organizational structure.

Deliverable 3.1 – Planning, attendance, and documentation of five milestone working group meetings.

Deliverable 3.2 – Development of five PowerPoint presentations, each one summarizing progress since the previous working group meeting. Two rounds of review for each PowerPoint.

Task 4: Existing Conditions Analysis

Task 4.1 Existing Plan, Ordinance, and Regulation Review

Consultant will review, inventory, categorize, and describe relevant existing plans, policies, and regulations as obtained in Task 2.

Task 4.2 Data Review

Consultant will review, inventory, categorize, and describe relevant data collected in Task 2, including for the following categories:

- Population, jobs, employment, demographic, and travel behavior characteristics and trends including effects from COVID-19.
- Identification of current, and historic (if available) major local employers, their industry, and number of employees and location.
- Development pipeline (location, # units, sq footage, proposed use, development timeframe)

Deliverable 4.1 – Annotated Table of Contents of Existing Conditions Analysis Memo, with one round of review.

Deliverable 4.2 – Existing Conditions Analysis Memo in form of a report chapter. Two rounds of review with consolidated comments filtered through BART PM to remove conflicting comments.

Task 5: Case Studies and Literature Review

Task 5.1 Case Studies and Literature Review

Consultant will prepare a literature review of relevant peer TDM organizations. Topics may include lessons learned, major funding sources and uses, services provided, administrative structure/staffing, enforcement mechanisms and the organization's goals/objectives.

Consultant will also include up to 3 case studies. Consultant will provide BART with a selection shortlist with justifications for selection of different case studies, and will proceed after conferring with BART on organization selection. Consultant will select organizations based on findings from working group meeting #2 and will seek to include at least one local-scale organization, at least one sub-regional scale organization, and a diversity of organizations containing the following characteristics:

- Both residential and non-residential members/users
- Serve industrial, manufacturing, and service employers
- Serve areas with characteristics similar to MTC's Equity Priority Communities
- Response to COVID-19

Each case study will include an interview with a manager or executive director (or similar level) at that organization. As part of this task, Consultant may incorporate findings from other similar literature reviews, such as the Elizabeth Hughes report.

Deliverable 5.1 – Annotated Table of Contents of Case Study and Literature Review Memo, with one round of review.

Deliverable 5.2 – Case Study shortlist.

Deliverable 5.3 – Case Study and Literature Review Memo in form of a report chapter. Two rounds of review with consolidated comments filtered through BART PM to remove conflicting comments.

Task 6: TDM Goals and Strategies Analysis

Task 6.1 TDM Goals and Strategies

Consultant will develop a list of recommended TDM goals and provide a qualitative assessment of their feasibility relative to effectiveness, market demand, and trends/effects from post COVID-19 conditions. Goals may include % reduction in VMT, mode share changes, or trip reduction goals.

Consultant will develop a list of TDM strategies and categorize these by tier in terms of strength of recommendation (low, medium, high), based on a qualitative assessment of feasibility relative to available

resources, effectiveness, market demand, and trends/effects from COVID-19. The list will include strategy name, descriptions, target geographic areas and/or populations, potential effectiveness relative to meeting up to 3 goals identified above, high-level cost (low, medium, high), and implementation responsibility (including identifying whether a TMA would be the appropriate implementing agency).

Most goals and strategies will likely originate from existing plans, but Consultant will consider new or updated goals and strategies as part of this task.¹

Task 6.2 Staff Meetings

Consultant will convene a total of two meetings with Richmond and El Cerrito staff to gather information on current TDM programs and their effectiveness.

Deliverable 6.1 – Annotated Table of Contents of TDM Goals and Strategies Analysis Memo with one round of review.

Deliverable 6.2 – TDM Goals and Strategies Analysis Summary Memo in form of a report chapter. Two rounds of review with consolidated comments filtered through BART PM to remove conflicting comments.

Task 7: Organizational and Financial Analysis

Task 7.1 Organizational Analysis

Consultant will develop, compare, and evaluate organizational structures, and their associated funding needs, sources and uses, which are best suited to implement the TDM goals and strategies identified in earlier tasks. Consultant will also consider education and enforcement mechanisms. Consultant will evaluate up to three different organizational structures. At least one will be local-scale (e.g. TMA) and at least one will be sub-regional scale (e.g. JPA). Consultant will provide BART with a list of potential organizational structures and provide a short-list of recommendations with justifications for recommendation, before proceeding with the organizational analysis after receiving BART feedback on selection.

As part of this task, Consultant will study and provide a recommendation for each of the following:

- Geographic Extent: Compare and evaluate tradeoffs from organizations that include individual cities, a subregional area (i.e. WCCTAC), or multiple cities (i.e. Richmond and El Cerrito).

¹ TDM strategies may include educating commuters on commuter benefits ordinance and planning for them to contribute, Richmond Moves on-demand shuttle, incentives in conjunction with on-street parking management, developer and employer contributions to fund transit including transit passes, pre-loaded Clipper cards, pre-loaded BikeLink cards, and funds for operations of a valet bike station, and developer and employer contributions to fund bike incentives.

- Organizational Options: TMA, BID, WCCTAC/511.org, Chamber of commerce/industry organization, etc.

After input at working group #4, Consultant will select a recommended organizational structure.

Task 7.2 Regulatory Analysis

Consultant will identify any regulatory changes needed (such as an ordinance in El Cerrito) for the recommended organizational structure.

Task 7.3 Financial Analysis and Implementation Plan

For the recommended organizational structure, Consultant will produce a financial analysis which will include:

- Financial Analysis:
 - Identify potential organization start-up and ongoing operational costs.
 - Using the list of funding opportunities developed for BECCAP as a key reference, identify existing and potential funding sources, uses, and needs including grants, city funds, Chevron, micromobility revenue and fees, Commuter Benefit Ordinance contributions, and tax-increment financing and, if necessary, explore feasibility of new funding sources such as tax assessments, mandated or voluntary fees, and parking revenue.
 - Identify several grant funding sources from the above set of sources which would be more ideal for smaller cities like Richmond and El Cerrito based on general alignment with purpose and size of grants.
 - Develop fee structure as needed.

Task 7.4 Implementation Plan

For the recommended organizational structure, Consultant will produce an implementation plan which will include:

- Implementation plan:
 - Outline actionable implementation steps for the recommended organizational approach.
 - Identification of a management entity, governance structure, and proposed roles for each member organization or partner organization.
 - A phasing timeline for the first few years.

Task 7.5 MTC TOC Findings

Consultant will add necessary steps to the implementation plan that reflect steps cities could take to update their TDM plans and other code elements to qualify for future MTC Transit-Oriented Communities (TOC) designation and funding opportunities.

Deliverable 7.1 – List of potential organizational structures with short-list of recommendations.

Deliverable 7.2 – Annotated Table of Contents of Task 7 Chapter.

Deliverable 7.3 – Draft Report containing Task 4, 5, 6 deliverables and containing a chapter that includes a summary of findings and recommendations from the organizational and financial analysis (Task 7). Two rounds of review with consolidated comments filtered through BART PM to remove conflicting comments. Second round of comments expected to be mainly editorial in nature.

Task 8: External Stakeholder Outreach

Consultant will engage relevant stakeholders (developers, employers, property owners, etc) who may be affected by the implementation of the plan. Goals of stakeholder outreach include: 1) educating stakeholders about the benefits of TDM; 2) understanding stakeholder perspectives on existing TDM requirements; 3) soliciting stakeholder feedback on potential future organizational structures.

Consultant will deliver two webinars as described below. Each will contain a poll/survey to be undertaken during the webinar. The working group members would provide a list of stakeholders to be contacted with email addresses. Consultant will draft and send communications to stakeholders. Consultant will make up to 12 follow-up phone calls with key stakeholders (with phone numbers provided by working group members) after email communications go out but prior to the webinars, to encourage attendance. Consultant would develop and provide the staff, materials, and electronic platforms (i.e. hosting online survey and webinar) for production and execution of this task.

Task 8.1 Webinar 1

Consultant will host a webinar targeted at stakeholders, containing a presentation on:

- Existing TDM Requirements
- Existing Conditions
- Benefits of TDM
- TDM Goals and Strategies

The presentation will mostly contain content repurposed from Task 3.2. The webinar could incorporate polls and other live feedback mechanisms to collect data on stakeholder perspectives on existing TDM requirements and programs, their opinion on potential TDM strategies, and their sentiment and willingness

to pay into city provided services to comply with the Commuter Benefit Ordinance. This round would take place shortly near the end or at the end of Task 4.

Task 8.2 Webinar 2

Consultant will host a webinar targeted at stakeholders, containing a presentation on:

- Key findings from Task 7, such as organizational structures and governance considerations and recommendations

The presentation will mostly contain content repurposed from Task 7. The webinar could incorporate polls and other live feedback mechanisms to collect data on stakeholder perspectives on the findings. This round would take place near the end of Task 7.

*Deliverable 8.1 – Completion of Webinar 1, including survey results and PowerPoint presentation.
Compilation of input received as report appendix.*

*Deliverable 8.2 – Completion of Webinar 2, including survey results and PowerPoint presentation.
Compilation of input received as report appendix.*

Scope of Work – Part 2 – Mobility Fairs

Task 9: Mobility Fairs

Consultant will support BART in planning for and hosting mobility fairs at El Cerrito Plaza Station to provide BART riders with information about accessing the station when TOD starts construction and parking supply is reduced.

Task 9.1 Mobility Fair Planning and Flyer Development

Consultant will refine and finalize the in-station outreach draft plan developed by BART via the file “2023 – 2024 ECP Proposal” received via email on March 3, 2023 (or more recent version as provided by BART).

Consultant will work with BART to finalize fair content/themes, communication preferences, timeline, dates and times, and external partners for the mobility fairs. Such partners can include BART staff, City of El Cerrito staff, City of Richmond staff, city of Albany staff, MTC 511, MTC Clipper, West Contra Costa Transportation Advisory Committee (WCCTAC), local bicycle shops, bicycle parking manufacturers, micromobility providers, and community-based organizations. Further coordination will be performed through Task 9.2.

Deliverable 9.1 – Up to three fair planning meetings with BART staff (including Planning, Customer Service, Real Estate, Communications, Transportation Services in two rounds, draft and final).

Task 9.2 Mobility Fair Organization and Attendance

Once mobility fair partners are confirmed through Task 9.1, Consultant will develop and manage a task tracker for mobility fair organization and attendance. Consultant will schedule prep meetings with fair partners to coordinate participation, staffing, and interactive resources for the public. Consultant will work with BART to determine staffing expectations from fair partners with the expectation that Consultant will provide four staff members to attend one of the two fairs being planned (Consultant will not attend the other of the two fairs). Consultant will staff at least one Spanish speaking staff member and one Chinese speaking staff member to provide in-language interpretation services at the fairs. Additional translation services will require coordination from BART.

Consultant will organize up to two mobility fairs in 2024. These are expected to be weekday evening events that last approximately two hours and require two additional hours of set-up and take-down. Consultant will work with BART to determine set-up locations at the El Cerrito Plaza Station. Each fair will include visual and verbal information on El Cerrito Plaza TOD changes followed by a brief paper or online survey on access to the station. Consultant will prepare for both mobility fairs but only attend one of the mobility fairs.

BART will provide Consultant with information on attendance and members of the public reached for the mobility fair for which Consultant will not attend.

Deliverable 9.5 – Task tracker for mobility fair organization and attendance.

Deliverable 9.6 – Up to six prep meetings for the mobility fairs with external partners.

Deliverable 9.7 – Attendance and facilitation in one of the two mobility fairs being planned, consisting of four Consultant staff.

Deliverable 9.9 – Draft/final memorandum summarizing the mobility fairs, results of a survey to be developed by BART, attendance, and members of the public reached.

Prime: Fehr and Peers

Subconsultant	Amount	DBE (Y/N)	SBE (Y/N)
Gray-Bowen-Scott	\$ 101,781	N	N
CHS Consulting Group	\$ 34,170	N	N

Total Work Plan Value: \$ 316,315