

**CITY OF KEY WEST – TRANSIT DEPARTMENT**  
**MAJOR UPDATE OF TEN-YEAR TRANSIT DEVELOPMENT PLAN (2020-2029)**  
**SCOPE OF SERVICES**  
**Tindale Oliver (August 8, 2018)**

**Introduction**

The City of Key West - Transit Department (City) has requested Tindale Oliver (Consultant) to complete a Scope of Services and estimated budget to complete a Florida Department of Transportation (FDOT) compliant Ten-Year Transit Development Plan (TDP) Major Update for the fiscal years of 2020-2029. The adopted TDP is required to be submitted to FDOT by September 1, 2019. A primary goal identified for the TDP update is the identification of strategies to increase ridership and efficiency for current services and enhance connectivity to potential parking facilities and other services.

**Ten-Year Transit Development Plan Major Update**

The Consultant will prepare a TDP Major Update ensuring the preparation of a practical and implementable plan that truly reflects the near-term vision for a transit agency's growth and improvement over time. The resulting TDP will be compliant with the TDP Rule outlined in Chapter 14-73, F.A.C. The current Rule requirements for the TDP are planning for a 10-year horizon, expanding public involvement activities, using an approved demand estimation tool (e.g., TBEST), completing an enhanced situation appraisal, and being more specific in the financial planning approach.

As a strategic plan, a TDP will identify needs in an unconstrained fashion and identify service improvements for which currently there is no funding anticipated. The 10-year vision that will be generated during this plan update provides a beneficial tie and consistency with the City of Key West's long range transportation goals and plans. Additionally, the TDP will assess local transit needs and policies, prioritize current and proposed service improvements, and result in a phased implementation plan for the future growth and development of the transit agency.

Specifically, a TDP includes the following major elements:

- Public involvement plan and process
- Base data compilation and analysis (review of demographic and travel behavior characteristics of the service area)
- Performance evaluation of existing services
- Situation appraisal (transit agency strengths and weaknesses; external barriers and opportunities; estimation of community demand for transit)
- Goals and objectives
- Transit demand and mobility needs
- Development of proposed transit enhancements (funded and unfunded)
- 10-year implementation plan
- 10-year financial plan (projected costs and revenues)
- Other strategic issues specific to a given study area

An additional requirement for the TDP was added by the Legislature in 2007, when it adopted House Bill 985, amending s. 341.071, F.S., requiring transit agencies to “... specifically address potential enhancements to productivity and performance which would have the effect of increasing the farebox recovery ratio.” FDOT subsequently issued guidance requiring the TDP and each annual update to include a one- to two-page summary report on the farebox recovery ratio, and strategies implemented and planned to improve it, as an appendix item. This scope of services ensures that the major update of the City’s TDP will comply with all requirements of the TDP rule.

The activities to be completed during the TDP major update are listed below and detailed in the remainder of this scope of services.

- Task 1: Initiate & Manage Project
- Task 2: Establish Baseline Conditions
- Task 3: Facilitate Public Involvement
- Task 4: Identify & Evaluate Existing Transit Services
- Task 5: Conduct Situation Appraisal
- Task 6: Estimate & Evaluate Demand & Mobility Needs
- Task 7: Review & Update Goals & Objectives
- Task 8: Prepare Ten-Year Transit Development Plan

## Background

The City of Key West owns and operates the Key West Transit system as a City Department. As such, the Key West City Commission is the governing board for the transit system and will be the approving authority. City of Key West goals and plans are also the goals and plans of the transit system. Therefore, understanding how the City plans and responds to the growth, tourism, weather and community events, economic development, and other factors will influence how the transit system must plan and look like in the future. Heavy traffic congestion and limited space for parking is always a concern in an island community with constrained and limited land available. Besides limiting transportation factors, understanding past decisions and how these factor into today’s needs and decisions is highly relative to the approach the TDP must undertake to develop viable options that promise to manage travel demand and inform a successful TDP conclusion.

Key West Transit’s unique operating influences are not limited to the island topography and remoteness, or the human environment and activities, but also includes the lack of federal urban support and typical practices and requires much more local initiation and dedicated support than typical for communities this size. Therefore, recognition of the advances made with the regional connection via the Lower Keys Shuttle, the new services of the Duval Loop, the increases in state and local funding, will need to be factored with the future needs and opportunities. These opportunities include such strategies as remote parking and direct shuttle connections, enhanced marketing and awareness, potential efficiencies through operational improvements, and other alternatives yet to be identified. How the City continues to operate its five (5) routes and considers future needs will require building a unified vision with realistic goals and recommendations that stakeholders, citizens, and decision makers will need to support and promote, and is a priority of the TDP process.

## **Task 1: Initiate & Manage Project**

Upon Notice to Proceed, the Consultant will prepare for and facilitate a kickoff teleconference meeting with City staff. In addition, the Consultant will assist the City staff in establishing a project management team comprised of City and Consultant staff and may include others as agreed to be the City and Consultant. This team will plan and conduct coordination meetings, either prior to or after various public involvement activities or project presentations. These meetings may be in person or by telephone as agreed by the Consultant and City staff. These meetings will focus on coordinating project activities, schedule, deliverables, and reviews. The Consultant will also provide monthly progress reports with invoices, indicating current activities, upcoming actions, and any changes or impacts to the work plan. Summaries of project management team meetings will be prepared by the Consultant and provided to the City for review. These summaries will be included in the draft and final TDP documents.

### *Responsibilities of the Consultant:*

- Prepare for and facilitate kickoff teleconference meeting.
- Coordinate with the City to establish the project management team.
- Prepare for and facilitate up to 4 project management team meetings.
- Provide monthly progress reports.

### *Responsibilities of the City:*

- Participate in kickoff teleconference meeting.
- Coordinate with Consultant to establish the project management team.
- Participate in up to 4 project management team meetings.
- Review monthly progress reports.

## **Task 2: Establish Baseline Conditions**

As with any strategic planning process, understanding where we are at currently is required, so this task will be to establish baseline conditions providing a foundation of understanding of the current socio-demographics and other characteristics of the City that will be used during the remainder of the TDP analysis.

### ***Sub-Task 2.1: Collect and Prepare Baseline Conditions***

The Consultant will collect appropriate local data to document and assess the pertinent conditions in which the City operates. The documentation process will include tables, maps, and graphics that describe and illustrate the operating environment in the county. Coordination will occur with City and other local agencies to identify the most current local information. Other secondary sources will be used as available (e.g., American Community Survey, American Housing Survey, Florida Statistical Abstract, etc.). At a minimum, the following conditions will be collected for this task:

- Physical description of service area
- Population characteristics and trends
- Socio-demographic characteristics and trends
- Housing, employment/labor, and related densities
- Current and future land use and densities
- Major activity centers and trip generators

- Tourist and visitor levels
- Travel behavior and commuting trends
- Roadway and traffic conditions
- Current and planned transit services
- Other conditions as available and beneficial for additional context, including any impacts from reoccurring special events

### ***Sub-Task 2.2: Prepare Technical Memorandum No. 1***

The Consultant will prepare Draft Technical Memorandum No. 1 to report on all of the work completed for Tasks 1 and 2. The draft document will include a summary of the prevailing local conditions identified and analyzed in Task 2. As necessary, detailed data summaries will be provided in accompanying appendices. In addition, key findings, conclusions, and summary statistics will be presented in the report in a user-friendly manner with easy-to-understand charts, tables, and/or graphs.

Upon completion, the draft document will be provided to City staff and the project management team for review. Comments received will be incorporated as appropriate into the draft TDP document that will compile the individual technical memoranda prepared throughout the project.

#### ***Responsibilities of the Consultant:***

- Compile data to support baseline conditions assessment.
- Analyze data and establish baseline conditions (maps and tables).
- Prepare draft Technical Memorandum #1.

#### ***Responsibilities of the City:***

- Coordinate with Consultant as necessary.
- Review and comment on baseline data.
- Review and comment on draft Technical Memorandum #1.

### **Task 3: Facilitate Public Involvement**

The Florida TDP Rule emphasizes public involvement, as follows:

*The TDP preparation process shall include opportunities for public involvement as outlined in a TDP public involvement plan, approved by the Department, or the local Metropolitan Planning Organization's (MPO) Public Involvement Plan, approved by both the Federal Transit Administration and the Federal Highway Administration.*

The rule also indicates that:

- The TDP must include a description of the public involvement process and activities.
- Comments must be solicited from Workforce Development Board.
- The Department, Workforce Development Board, and MPO must be advised of all public meetings where the TDP is to be presented or discussed.
- The Department, Workforce Development Board, and MPO must be given an opportunity to review and comment on the TDP during the development of the mission, goals, objectives, alternatives, and 10-year implementation program.

The City is not located within an MPO planning area, so to ensure that the City meets these requirements, the Consultant will facilitate a public involvement process for the TDP effort that will encompass a wide range of activities. The following sub-tasks highlight the specific activities that will occur as part of this task.

***Sub-Task 3.01: Develop Public Involvement Plan***

To accommodate the Rule requirements, the Consultant will develop a TDP Public Involvement Plan (PIP) for the City that will consider the TDP requirements, the unique needs and characteristics of the community, and previous and other public involvement activities, including any that have been completed recently by the City. This plan will be submitted to FDOT District 6 staff for review and approval per rule guidance. The PIP will include, at a minimum, stakeholder interviews, surveys of City bus and paratransit patrons and other citizens, discussion group and board workshops, public listening sessions, and the use of social media.

The Consultant will develop three (3) scenarios for branding the TDP based on internal brainstorming and ideas with staff from the City. Ideas for the project brand will be reviewed and discussed as part of a teleconference with City staff. Branding the TDP is a critical step toward making the planning and public involvement process more user friendly, perhaps resulting in a brand that continues on after completion of the TDP.

***Sub-Task 3.02: Conduct Stakeholder Interviews***

Since the understanding of local conditions should include knowledge of the perceptions and attitudes of community decision-makers and leaders towards transit, 10 stakeholder interviews will be conducted as part of the public involvement process. The Consultant will work with City staff to identify and recruit appropriate individuals to interview. The Consultant will then schedule and conduct the interviews using an interview script that will be developed and submitted to the City for review prior to the first interview. To make more efficient use of City budget dollars, efforts will be made to schedule the interviews during trips to the City for other tasks and purposes. Additionally, stakeholders will be given the option of participating via a telephone interview if this method fits better in terms of schedule.

***Sub-Task 3.03: Conduct On-Board Survey/Conduct Operator Interviews***

The Consultant will conduct an on-board survey of 100% of City's scheduled fixed-route bus trips to obtain information related to the attitudes, preferences, and habits of current riders for market research purposes (the survey will not be specifically geared for travel demand model input or validation). The on-board survey methodology and implementation will be coordinated closely with City staff to ensure that study objectives are met and data collection efforts are efficiently integrated with City operations. In addition, the survey form will be developed in conjunction with the project management team and will draw on City's most recent survey questionnaire to promote consistency of questions and response cohorts. This will facilitate subsequent comparative analysis of results over time. Prior to beginning the on-board survey process, Consultant staff will facilitate a teleconference (or meet in person as part of another trip to the City) with City marketing and operations staff to ensure a clear understanding of the methodology, process, and timeframe. The Consultant also will provide survey notices for City to distribute to its bus operators and on board its buses to notify patrons of the upcoming event.

The Consultant will use electronic tablets to facilitate the collection of data during the survey interview process on board the vehicles. Once approved, the questionnaire will be programmed as an easy-to-use survey application and will step the patron through the questions with directed branching geared to account for prior responses. Collection of origin/destination (O/D) information through the electronic tablets and interview process will increase the number of valid, accurate, and geocodable responses from bus riders. The on-board survey is expected to cover a sample of all routes and runs for all times of day for a representative weekday and Saturday of service. To the extent possible, the survey will be scheduled to capture peak season activity in the county. The survey app will consider both English and Spanish languages, as necessary.

The Consultant will work with team member Rapid Staffing, Inc. (RSI) to recruit and train survey personnel and assign them to survey runs during the course of an expected two-week period for survey distribution. RSI is a certified DBE temporary personnel agency that has supported Tindale Oliver with staffing on-board surveys throughout Florida.

The Consultant staff will be present on-site during the survey process to work with City operations staff to ensure the orderly placement of survey personnel on buses and deal with any issues that may arise during the effort. Our trained surveyors will approach riders once they board to request a survey interview. All bus riders will have an equal chance of being interviewed, as all candidates will be randomly selected if on-vehicle conditions do not allow every rider on a given trip to be interviewed before they alight. One unique aspect of our survey process that has proven quite successful is to offer cash incentives to survey personnel to encourage worker retention and active participation throughout the data collection timeframe. This has proven to increase survey response rates, since contests typically are based on the number of completed surveys.

All completed survey entries will be downloaded to a Consultant server established for this purpose to organize them for data processing and analysis. The draft response database then will be cleaned to ensure accuracy, consistency, and appropriateness of response cohorts for each question. Additional geocoding also may be required at this stage. Next, data analysis will be conducted to create selected cross-tabulations and statistics consistent with previous on-board data collection efforts and to reflect input from City staff. The Consultant will be responsible for quality control and accuracy throughout the data entry and analysis process, and also will seek to include any pertinent information, as available, from previous on-board surveys.

Operator interviews as described in Task 3.08 will be conducted as part of the trip to the City for the on-board survey.

#### ***Sub-Task 3.04: Conduct Discussion Group Workshops (2 on same day)***

To obtain additional public input into the TDP process, the Consultant proposes to conduct a total of two discussion group workshops that will be held around the county to ensure representation that is geographically distributed. These workshops typically involve a smaller group of participants (8–12 persons) in an intimate meeting setting that permits more in-depth discussion about issues and needs. The two workshops will be held in different areas to coincide with City's existing service area. To generate interest and participation, the Consultant will work with City staff and the review committee to identify and invite potential participants to each workshop. This coordination also will include the

selection and scheduling of appropriate venues for the workshops. For budget purposes, it is assumed that the two workshops will be held on the same day.

The Consultant will be responsible for recruiting workshop participants, with assistance from City staff. Potential workshop candidates may include members from the business, health, social service, and education communities, as well as local chambers of commerce, the Hotel/Motel Association, and active stakeholder groups. Since representatives from these organizations most likely would represent “non-user” views, it will be important to notify current City patrons of all the workshops so that the “user” perspective is represented as well. Although it may be preferable to focus rider input at a single workshop, it would be beneficial to attempt to get user participation at all of the workshops to enhance the discussion.

At the workshops, a variety of techniques will be used to encourage participation and elicit perceptions, ideas, preferences, and other input that is important to inform the TDP process. For example, the Nominal Group Technique could be used to identify potential transit improvement concepts and then dot-polling and/or resource allocation exercises can be applied to the identified concepts to help set preferences on improvement priorities.

#### ***Sub-Task 3.05: Conduct Public Listening Sessions***

The Consultant will prepare for and facilitate two public listening sessions that are designed to go out to events or locations where people gather, such as a shopping mall. These sessions will include displays and interactive information exchange, public surveys, and enlistment for social media. They will be designed to capture information from seasonal and permanent residents about community values, needs, and priorities. The locations will be decided jointly with Consultant and City staff, with logistical arrangements handled by City staff and session materials developed by the Consultant. The City staff, at their discretion, may plan and conduct additional listening sessions utilizing the materials prepared by the Consultant.

#### ***Sub-Task 3.06: Conduct Public Input Survey***

The Consultant will conduct a survey of the general public to obtain information related to the attitudes, preferences, and goals of the community related to public transit services. The survey will be available on-line, through social media, and in a hard copy version. Access to the on-line version will be via links on the City, County, and other websites as identified and available. The hard copy will be provided at workshops, listening sessions, via bus pass outlets, and through partnering agencies and facilities such as libraries and other similar venues. These will have a location and/or mail in process for collection.

#### ***Sub-Task 3.07: Engage Public through City Website, Social Media, and Email Blasts***

The Consultant has found value in engaging citizens via social media and websites. It is proposed that the Consultant provide information to the City for their website and social media, including public surveys, project information, meeting dates, and highlights about the City system. Emailing news and informational blasts via email lists maintained by the City and other sources, will provide additional information and outreach to stakeholders, citizens, and riders.

### ***Sub-Task 3:08: Prepare for City Operator Interviews***

The Consultant will conduct interviews of a representative group of City operators. As the first line of contact and interaction with City riders, bus operators tend to understand the needs and concerns of the system users and can provide input into understanding comments received on surveys and through workshops. This will be accomplished at the City offices and will be no more than two group sessions on the same day to minimize impact to the operator schedule. Consultant staff will develop a script with 5-8 questions and submit to City staff for review prior to the interviews. The Consultant will work with City leadership to schedule and conduct the interviews.

#### ***Responsibilities of the Consultant:***

- Prepare Public Involvement Plan.
- Plan and conduct stakeholder interviews (10), in person as part of other trips or by telephone.
- Plan and conduct on-board survey/conduct operator interviews.
- Prepare for and conduct discussion groups (2 on same day).
- Plan and facilitate public listening sessions (2 on same day).
- Conduct public input survey.
- Engage public through City website, social media, and email blasts.
- Prepare for operator interviews.

#### ***Responsibilities of the City:***

- Review all materials and identify stakeholders.
- Schedule venues and participate in public listening sessions and discussion groups.
- Assist in survey and social media outreach as needed.

The results of this effort will be summarized and provided to City staff for review and comment; it later will be provided to the project management team for consideration as part of Technical Memorandum No. 3, to be prepared in Task 7.

### **Task 4: Identify & Evaluate Existing Transit Services**

The Consultant will work with City staff to collect up-to-date information on existing City services to support the review and evaluation of the transit services being provided in the City. Information also will be collected and reviewed for other transportation services operating within the study area. The following sub-tasks are included in the identification and evaluation of existing transit services.

#### ***Sub-Task 4.01: Inventory Existing Transportation Services***

The Consultant will develop an inventory of public and private transportation service providers in the service area. Due the high level of tourist based services, discussions will be help with the project management team regarding the direction and extent this effort will take to collect information. A survey form will be used to collect the requisite information from the providers. Both the form and list of providers to be contacted will be reviewed with City staff to ensure completeness and appropriateness. The survey will be completed by telephone and/or e-mail. It is envisioned that, by provider, the inventory will document facility and equipment information, type of operation, service



area, operating characteristics (including frequency and ridership), and fee structure, among other data. It is important to recognize that the completeness of the final inventory will be dependent on the willingness to participate and degree of participation of the identified transportation providers.

***Sub-Task 4.02: Conduct Trend Analysis of Existing Transit Service***

The Consultant will conduct a performance review of City over a five-year period using the Florida Transit Information System (FTIS) and validated National Transit Database (NTD) information. This review will help assess existing City services in terms of system performance, effectiveness, and efficiency trends for the agency's fixed-route and ADA paratransit services.

This review of City will be undertaken to assess the performance of the system over time using measures falling into three major categories: system performance indicators, effectiveness measures, and efficiency measures (see Table 1). This evaluation will be conducted using both historical and the most current validated data available from the National Transit Database (NTD). As part of the overall performance review of the system, this analysis will be used to help assess the extent to which the City is meeting the stated goals and objectives for transit service.

A similar review will be conducted, albeit on a reduced scale because of the availability of fewer indicators and measures, for complementary ADA paratransit service provided or funded by City. For this evaluation, the NTD data also will be used.

**Table 1**  
**Performance Evaluation Indicators and Measures**

<b>General Performance Indicators</b>	<b>Effectiveness Measures</b>	<b>Efficiency Measures</b>
Passenger trips	Vehicle miles per capita	Operating expenses per capita
Passenger miles	Passenger trips per capita	Operating expenses per passenger trip
Vehicle miles	Passenger trips per revenue mile	Operating expenses per passenger mile
Revenue miles	Passenger trips per vehicle hour	Operating expenses per revenue mile
Vehicle hours	Revenue mileage between incidents	Farebox recovery ratio
Route miles	Revenue mileage between roadcalls	Revenue miles per vehicle mile
Operating expenses		Revenue miles per vehicle
Capital expenses		Revenue hours per employee
Operating revenues		Passenger trips per employee
Total employees		Vehicle miles per gallon
Vehicles available for maximum service		Average fare
Fuel consumption		

***Sub-Task 4.03: Conduct Peer Review Analysis of Existing Transit Service***

The Consultant also will use FTIS and NTD data to conduct a comparative peer review for City for the agency's fixed-route services. This review will be completed to compare various City performance characteristics to a group of transit peers. Peers will be selected using a specific methodology based on

selected operating parameters, which will be reviewed with City staff prior to the evaluation to ensure concurrence with the resulting peers. As in the trend analysis, the evaluation will include the indicators highlighted in Table 1 to reflect how efficiently the City supplies transit service and how effective those services meet the needs of the area in relation to peer systems.

*Responsibilities of the Consultant:*

- Conduct inventory of existing services.
- Conduct trend analysis.
- Conduct peer review analysis.
- Coordinate with City staff as necessary.

*Responsibilities of the City:*

- Provide necessary data to complete evaluation of services.
- Coordinate with Consultant as necessary.

The results of this effort will be summarized and provided to City staff for review and comment; it later will be provided to the project management team for consideration as part of Technical Memorandum No. 2, to be prepared in Task 5.

**Task 5: Conduct Situation Appraisal**

Transit systems function best in an environment when they intimately understand the regulatory, geographic, environmental, land use, developmental, political, and other factors that can and do impact the provision of their services. The Consultant will conduct a situation appraisal to document such factors for the City so that staff will better understand its local environment. The following sub-tasks explain the work that will be conducted as part of this task.

***Sub-Task 5.01: Review Local Plans & Documents***

The Consultant will collect and review local plans and documents that may have a direct bearing on transit services in the county. The goal of this process will be to compile any existing transit-related community goals, objectives, and/or policies. The documents are expected to include the City's long range transportation goals and plans and other recent studies, previous TDP, TDSP, various local government comprehensive plans, other recent City studies, and other related documentation. Pertinent regional plans also will be considered in this process as available and applicable.

***Sub-Task 5.02: Conduct Situation Appraisal***

The Consultant will complete a situation appraisal for the City to help assess and document the key aspects of the transit agency's operating environment. This appraisal will involve examining the strengths and weaknesses of the system, as well as any existing barriers or threats to the provision of service in the county and key opportunities for addressing threats and/or enhancing the transit-friendliness of the operating environment.

FDOT-required elements of such an appraisal will be included to ensure compliance. This will include an assessment of the effects of land use, government policies and plans, development and growth trends, tourism and visitors, organization, and technology trends on City. Additionally, an estimation of the

community's demand for transit services, including 10-year annual ridership projections, will be completed in Task 6, and referenced in the situation appraisal as appropriate. The results will provide an understanding of the challenges for transit service development focusing on current and planned development decisions and funding strategies.

### ***Sub-Task 5.03: Prepare Technical Memorandum No. 2***

The Consultant will prepare Draft Technical Memorandum No. 2 to report on the work completed for Tasks 4 and 5. The draft document will include a summary of the transportation service provider inventory, the results from the performance review tasks completed for City's fixed-route and ADA paratransit services, and situation appraisal for City. As necessary, detailed data summaries (such as the inventory information) will be provided in accompanying appendices. As with the first technical memorandum, the report will be developed in a user-friendly manner with easy-to-understand charts, tables, and/or graphs.

Upon completion, the draft document will be provided to City staff and the project management team for review. Comments received will be incorporated as appropriate into the draft TDP document that will compile the individual technical memoranda prepared throughout the project.

#### ***Responsibilities of the Consultant:***

- Review local plans/documents and identify community goals for transit services.
- Conduct situation appraisal.
- Prepare draft Technical Memorandum #2.

#### ***Responsibilities of the City:***

- Review and comment on community goals summary and situation appraisal.
- Coordinate with Consultant as necessary.
- Review and comment on Technical Memorandum #2.

## **Task 6: Estimate & Evaluate Demand & Mobility Needs**

The Consultant will estimate the demand for City's fixed-route bus service over the 10-year horizon of the TDP. Similarly, the transit agency's paratransit service demand also will be estimated for the same timeframe. Then, this information, along with the results from the previous tasks, will be used to evaluate the transit needs of the county. The following sub-tasks detail the effort proposed to be completed during this task.

### ***Sub-Task 6.01: Estimate Demand for Transit Services (TBEST)***

The Consultant will develop fixed-route bus ridership demand estimates (at route and system levels) for the 10-year transit planning horizon. This will be done to reflect maintenance of existing service levels throughout the period, as well as the implementation of proposed TDP improvements. Since these projections must be developed using an FDOT-approved planning tool (TBEST) or demand estimation technique, the Consultant will use the latest TBEST version available (4.2.1), as developed and distributed by FDOT.

### ***Sub-Task 6.02: Assess Demand with Additional GIS-Based Tools***

Other GIS-based transit demand assessment tools that will be used include the following:

- Transit Orientation Index (TOI) – potential for traditional transit use (residential-based index that looks low-income, vehicle ownership, youth population, and older adult population)
- Density Threshold Assessment (DTA) – potential for traditional and choice transit use (residential and employee-based assessment that reflects the direct relationship between population/employment density and propensity to choose to use transit)

Additional analysis will be completed to estimate demand for service assuming that existing service levels are improved. It is important to note that these analyses will be at the system level and will not necessarily yield route-specific service design or scheduling recommendations.

### ***Sub-Task 6.03: Identify & Assess Needs for Transit Services***

The previous task efforts, particularly the results of the public involvement activities, will be critical in the assessment of potential future transit service improvement needs. The Consultant will use this information in conjunction with local conditions data to evaluate the need for new, improved, and/or expanded transit service. The GIS-based transit demand assessment tools discussed previously will be used as part of this process to assess traditional and discretionary transit markets in the City. The needs assessment also will include an examination of possible intermodal connections, coordination of service with other operators, and the potential implications for complementary ADA paratransit service. Alternative methods for potentially addressing gaps between identified needs and available services will be identified and assessed.

### ***Sub-Task 6.04: Identify & Evaluate Alternatives***

Using the results of the previous sub-task, the Consultant will work with City staff to identify and develop transit improvement alternatives that will best meet the desired vision over the next decade for City services in the county. Alternatives may range from the status quo (maintaining the existing mix of services) to a thorough restructuring of public transportation service and may even include consideration of special event services and Transportation Demand Management (TDM) measures. The development of the alternatives will not consider cost at this stage and may range from no growth in the transit system, to consideration of new and innovative service concepts, to perhaps even a complete re-visioning of the network. The Consultant then will prepare an evaluation methodology to support the development and evaluation of transit alternatives for the 10-year planning horizon. Evaluation criteria will be established and weighted in coordination with the City. The outcome of the evaluation will be transit improvement priorities.

#### ***Responsibilities of the Consultant:***

- Estimate demand for transit services (TBEST).
- Assess demand with additional GIS-based tools.
- Identify and assess needs for transit services.
- Develop evaluation methodology and develop/evaluate potential alternatives.

#### *Responsibilities of the City:*

- Review ridership estimates.
- Review and provide feedback on alternatives and the evaluation.
- Coordinate with Consultant as necessary.

The results of this effort will be summarized and provided to City staff for review and comment; it later will be provided to the project management team for consideration as part of Technical Memorandum No. 3, to be prepared in Task 7.

#### **Task 7: Review & Update Goals & Objectives**

Throughout the prior tasks, the Consultant will work with City staff and project management team to establish the desired 10-year vision for the agency. This overarching vision will then be used to guide the development of updated goals and objectives for City and its transit services. Goals and objectives will be consistent with the goals of the local community with respect to transportation and land use, in general, and specifically to transit service. The goals and objectives prepared for the previous major update of the TDP and the latest long range transportation plan will be used as a starting point and then updated as appropriate. The Consultant also will work closely with the City in delineating a vision of where transit wants to be in 10 years. The following sub-tasks reflect the work that will be completed during this task to establish the goals and objectives.

##### ***Sub-Task 7.01: Integrate Situation Appraisal and Previous Public Input***

The Consultant will review the results of the public involvement activities, as well as the key aspects of the situation appraisal findings, to identify major themes, concepts, and focus areas to inform the transit goals and objectives for the City. The stakeholder interviews and input from the project management team will be especially important to the goal development process.

##### ***Sub-Task 7.02: Develop Draft Goals & Objectives***

The Consultant will develop a set of draft goals and objectives for City staff and the project management team to consider. Existing goals and objectives from the previous TDP Major Update will provide a starting point for the update process. It is important to note that consistency with the transportation and land use goals of the local community will be an important consideration during this process, and it is anticipated that the project management team will provide input in this regard.

##### ***Sub-Task 7.03: Prepare Technical Memorandum No. 3***

The Consultant will prepare Draft Technical Memorandum No. 3 to report on the work completed for Tasks 3, 6, and 7. The draft document will include the results from each of the public involvement activities completed as part of Task 3 and will document the findings from the stakeholder interviews, on-board survey, discussion group workshops, public survey, listening sessions, and the social media campaign. Also included will be the summary of the estimation of demand for the City's fixed-route and demand-response services, needs assessment, alternatives evaluation, and the proposed goals and objectives for the transit agency. Similar to the previous technical memoranda, the report will be developed in a user-friendly manner with easy-to-understand charts, tables, and/or graphs.

Upon completion, the draft document will be provided to City staff and the project management team for review. Comments received will be incorporated as appropriate into the draft TDP document that will compile the individual technical memoranda prepared throughout the project.

*Responsibilities of the Consultant:*

- Develop recommended goals and objectives.
- Prepare draft Technical Memorandum #3.
- Coordinate with City staff as necessary.

*Responsibilities of the City:*

- Review and provide feedback on goals and objectives.
- Review and comment on Technical Memorandum #3.
- Coordinate with Consultant as necessary.

**Task 8: Prepare Ten-Year Transit Development Plan**

Upon completion of all the previous tasks, the Consultant will use the resulting information, from baseline conditions to public input to analytical results and priority alternatives, to prepare a 10-year TDP for the City. The strategic vision plan will be compiled from the previous technical memoranda with guidance and input from City staff and the project management team. It will contain guidance on the implementation of the plan, including considerations for potential new funding sources. The sub-tasks shown below outline the work that will be completed in this task.

***Sub-Task 8.01: Prepare Ten-Year Implementation & Finance Plans***

The Consultant will prepare draft 10-year implementation and finance plans based on the four technical memoranda completed in the previous tasks. Among the key elements included in the plans will be the documentation of recommended service alternatives and improvements to help address identified transit needs and deficiencies; a phased plan for 10-year service and capital improvements, including a vehicle replacement plan; and a 10-year financial plan, which will detail all projected operating and capital expenses and revenues. It also will include potential new funding sources, unfunded recommendations, a policy element with system goals and objectives, and an annual farebox recovery ratio report.

***Sub-Task 8.02: Review/Enhance Performance Monitoring Program***

The Consultant will work with City staff to review and enhance its performance monitoring program that will meet staff needs for tracking the performance of the agency's routes and overall system. The program will focus on efficiency and effectiveness of service and will be set up to use regularly collected operational data (such as that compiled for NTD reporting purposes). The program will provide step-level guidance and appropriate thresholds to trigger consideration for potential route modification and elimination and be based as consistently as possible with nationally emerging performance standards and reporting.

### ***Sub-Task 8.03: Conduct Public Workshops and Presentations***

The Consultant will prepare for and conduct up to two workshops to further support the TDP public participation process. It is anticipated that these workshops will occur later on to gather input on potential alternative improvements and the implementation plan. The Consultant will coordinate with City staff to plan and schedule each workshop to target appropriate venues. To maximize opportunities for citizen participation, locations will be selected to ensure geographic coverage and, to the extent possible, piggyback on other community events to maximize participation. City staff will be responsible for securing any sites selected and for advertising and promoting the workshops.

In addition, the Consultant will prepare for and make two presentations at the direction of City staff. For this purpose, the Consultant will develop user-friendly, graphical presentations to support first the development of a community vision or priorities for the transit system, and then secondly the communication and adoption of the TDP. The presentation files also will be available for use by City staff beyond the adoption of the TDP.

### ***Sub-Task 8.04: Prepare Draft TDP Document***

The Consultant will prepare a complete Draft TDP document that integrates all previous task elements and results. The introduction to the TDP will include a checklist of all statutorily required TDP elements and their locations within the document to demonstrate compliance to the FDOT reviewer. The plan will then be submitted in an electronic version (PDF) to the City for review and comment. Any comments provided on the Draft TDP will be addressed in the Final TDP.

### ***Sub-Task 8.05: Prepare Draft Executive Summary for TDP***

The Consultant will prepare a concise Executive Summary of the full Draft TDP document. The Executive Summary will be concise, use graphics and easy-to-read bullets or highlights, and sufficiently small in size to enable the City to distribute it more easily and widely. An electronic copy (PDF) of this draft document also will be provided to the City and project management team for review and comment. Comments on the Draft TDP Executive Summary will be addressed in the final version.

### ***Sub-Task 8.06: Prepare Final TDP Documents***

Once the Draft TDP and Executive Summary have been sufficiently reviewed and accepted, the Consultant will finalize them and submit the Final TDP documents to the City. One printed copies of the Final TDP and Executive Summary will be produced and submitted to the City. Upon adoption of the Final TDP, the Consultant will prepare and deliver to the City one CD (or jump drive) containing all pertinent TDP documentation in Microsoft Word and PDF format, along with supporting files in databases, spreadsheets, GIS, and T-BEST.

#### ***Responsibilities of the Consultant:***

- Prepare ten-year implementation and finance plans.
- Review/enhance performance monitoring system.
- Prepare for and conduct public workshops (2).
- Prepare for and give final presentation to City Commission.
- Prepare draft TDP document.
- Prepare draft Executive Summary for TDP.

- Prepare final TDP documents (1 printed copy and 1 CD/jump drive of the final documents and supporting files).

*Responsibilities of the City:*

- Review and comment on draft TDP.
- Review and comment of draft executive summary of the TDP.
- Coordinate logistics for public workshops and board presentations.
- Coordinate with Consultant as necessary.

## **SUMMARY OF PROJECT DELIVERABLES**

Deliverables prepared as part of this scope of services are listed below. All written deliverables will undergo an external editorial review before being finalized for the City.

- Technical Memorandum No. 1 – Baseline Conditions (Tasks 1-2)
- Technical Memorandum No. 2 – Transit Service Identification and Evaluation, and Situation Appraisal, (Tasks 4-5)
- Technical Memorandum No. 3 – Public Involvement, Demand/Mobility Needs, and Goals/Objectives (Tasks 3, 6, and 7)
- Draft TDP Report and Executive Summary (electronic version)
- Final TDP Report (1 copy), Executive Summary (1 copy), and CD/jump drive (1 copy)

## **SUMMARY OF VISITS TO THE CITY OF KEY WEST**

The Scope of Services assumes 6 visits to the City of Key West. The primary purpose of each visit is summarized below; however, in-person stakeholder interviews, other meetings, and field work will be performed as part of these visits as necessary.

1. Technical Review Team Meeting, Field Work, and Presentation #1 (City Commission)
2. Technical Review Team Meeting and Discussion Group Workshops (2 scheduled on 1 day)
3. Public Listening Sessions (2 scheduled on 1 day)
4. On-Board Survey and Operator Interviews (part of same visit)
5. Project Review Team Meeting and Public Workshops (2 scheduled on 1 day)
6. Presentation #2 (final presentation to the City Commission)

## **PROJECT AGREEMENT**

In accordance with the River To Sea Transportation Planning Organization Agreement for Transit Planning Services – General Consulting, dated May 2, 2016, the City will access the Consultant’s services using the “piggybacking” allowances outlined in Section 25 of the Agreement. All terms and conditions of that agreement is approved by the City and the Consultant for the completion of the City of Key West Transit Development Plan.

## **PROJECT BUDGET**

A detailed project budget is provided in Table 2 (including hours by staff classification and costs by task and sub-task). The professional fees to update the City of Key West Transit Development Plan is estimated at \$127,494 for Tindale Oliver’s services. As outlined in the project agreement, this lump sum



budget includes all direct and indirect costs for services described in this scope. This budget includes all directly incurred project travel, printing, and other expenses, as outlined in this scope. Tindale Oliver will submit invoices on a monthly basis, including monthly progress reports. Additionally, frequent conference calls with the City's Project Manager and other personnel will be scheduled keep the City informed of the TDP progress and upcoming activities.

#### **PROJECT SCHEDULE**

The TDP Major Update will be finalized and adopted by the City Commission before September 1, 2019. A detailed project schedule will be prepared and reviewed as part of the project kickoff meeting.

Table 2  
PROJECT BUDGET (April 13, 2018)  
Tindale Oliver  
TEN-YEAR MAJOR UPDATE OF TRANSIT DEVELOPMENT PLAN (2020-2029)  
City of Key West - Transit Department

Task #	SUBTASK DESCRIPTION	Principal \$253.10	Project Manager \$230.79	Senior Planner \$152.31	Planner \$75.89	GIS Spec \$69.47	Admin/ Clerical \$65.81	Total Task Hours	Cost Per Task
1.00	Initiate & Manage Project	0.0	1.0	55.0	19.0	4.0	12.0	91.0	\$11,117
1.01	Prepare for and facilitate kickoff meeting teleconference.		1.0	3.0	4.0			8.0	\$991
1.02	Coordinate with City to establish a project management team.			2.0				2.0	\$305
1.03	Prepare for and support 4 project management team meetings.								
	Project management team #1 (and field work/presentation)			24.0	2.0	2.0	2.0	30.0	\$4,078
	Project management team #2 (and discussion groups)			6.0	2.0	2.0	2.0	12.0	\$1,336
	Project management team #3 (via teleconference)			2.0	3.0			5.0	\$532
	Project management team #4 (and public workshops)			6.0	2.0		2.0	10.0	\$1,197
1.04	Prepare monthly progress reports.			12.0	6.0		6.0	24.0	\$2,678
2.00	Establish Baseline Conditions	1.0	3.0	12.0	84.0	20.0	6.0	126.0	\$10,932
2.01	Compile data to support baseline conditions assessment.		1.0	2.0	32.0		2.0	37.0	\$3,096
2.02	Analyze data and establish baseline conditions (maps and tables).		1.0	2.0	32.0	8.0	2.0	45.0	\$3,651
2.03	Prepare Technical Memorandum No. 1 (Tasks 1-2).	1.0	1.0	8.0	20.0	12.0	2.0	44.0	\$4,185
3.00	Facilitate Public Involvement	0.0	4.0	92.0	109.0	39.0	192.0	436.0	\$38,553
3.01	Develop public involvement plan and brand the TDP.			4.0	8.0	16.0		28.0	\$2,328
3.02	Plan and conduct stakeholder interviews - in person as part of other trips or by phone (10).			16.0	15.0		4.0	35.0	\$3,839
3.03	Plan and conduct on-board survey/conduct operator interviews.		1.0	8.0	54.0		160.0	223.0	\$16,077
3.04	Prepare for and conduct discussion group workshops (2 on same day).		1.0	28.0	4.0		2.0	35.0	\$4,931
3.05	Plan and facilitate public listening sessions (2 on same day).		1.0	28.0	2.0	3.0	2.0	36.0	\$4,987
3.06	Conduct public survey.		1.0	2.0	14.0	4.0	24.0	45.0	\$3,455
3.07	Engage public through website, social media, and email blasts.			4.0	8.0	16.0		28.0	\$2,328
3.08	Prepare for operator interviews (conducted as part of trip for on-board survey).			2.0	4.0			6.0	\$608
4.00	Identify & Evaluate Existing Transit Services	0.0	0.0	12.0	48.0	0.0	24.0	84.0	\$7,050
4.01	Inventory existing transportation services.			4.0	4.0		24.0	32.0	\$2,492
4.02	Conduct trend analysis of existing transit service.			4.0	20.0			24.0	\$2,127
4.03	Conduct peer review analysis of existing transit service.			4.0	24.0			28.0	\$2,431
5.00	Conduct Situation Appraisal	1.0	2.0	20.0	60.0	10.0	12.0	105.0	\$9,799
5.01	Review local plans/documents and identify community goals.			8.0	24.0		4.0	36.0	\$3,303
5.02	Conduct situation appraisal.		1.0	4.0	20.0		4.0	29.0	\$2,621
5.03	Prepare Technical Memorandum No. 2 (Tasks 4 and 5).	1.0	1.0	8.0	16.0	10.0	4.0	40.0	\$3,875
6.00	Estimate & Evaluate Demand & Mobility Needs	0.0	2.0	17.0	86.0	104.0	0.0	209.0	\$16,802
6.01	Estimate demand for transit services (TBEST).		1.0	10.0	30.0	80.0		121.0	\$9,588
6.02	Assess demand with additional GIS-based tools.			1.0	12.0	24.0		37.0	\$2,730
6.03	Identify and assess needs for transit services.			2.0	20.0			22.0	\$1,822
6.04	Develop methodology and identify/evaluate alternatives.		1.0	4.0	24.0			29.0	\$2,661
7.00	Review & Update Goals & Objectives	1.0	2.0	20.0	36.0	16.0	14.0	89.0	\$8,526
7.01	Integrate situation appraisal and public input.			4.0	8.0			12.0	\$1,216
7.02	Develop draft goals & objectives.		1.0	8.0	12.0		2.0	23.0	\$2,492
7.03	Prepare Technical Memorandum No. 3 (Tasks 3, 6 and 7).	1.0	1.0	8.0	16.0	16.0	12.0	54.0	\$4,818
8.00	Prepare Ten-Year Transit Development Plan	2.0	4.0	74.0	82.0	72.0	12.0	246.0	\$24,715
8.01	Prepare ten-year implementation and finance plans.	1.0	1.0	8.0	32.0	8.0		50.0	\$4,687
8.02	Review/enhance performance monitoring program.			4.0	6.0			10.0	\$1,065
8.03	Conduct public workshops (2) on same day.			28.0	10.0	8.0	2.0	48.0	\$5,711
8.04	Prepare for and give final presentation to City Commission.			18.0	4.0	4.0		26.0	\$3,323
8.05	Prepare draft TDP document.	1.0	1.0	4.0	20.0	20.0	8.0	54.0	\$4,527
8.06	Prepare draft Executive Summary for TDP.		1.0	10.0	2.0	24.0		37.0	\$3,573
8.07	Prepare final TDP documents.		1.0	2.0	8.0	8.0	2.0	21.0	\$1,830
TOTALS		5.0	18.0	302.0	524.0	265.0	272.0	1386.0	\$127,494
DISTRIBUTION OF HOURS BY CLASSIFICATION		0.4%	1.3%	21.8%	37.8%	19.1%	19.6%	100.0%	