STAFF REPORT

MEETING DATE:	**April 27, 2021**
SUBJECT:	**Authorize Technical Services Agreement for Shasta Regional Active Transportation Network Project**
AGENDA ITEM:	**15**
STAFF CONTACT:	**Keith Williams, AICP, Senior Transportation Planner**

SUMMARY:

SRTA circulated a request for proposals (RFP) to prepare walking and biking infrastructure grant applications for the *Shasta Regional Active Transportation Network*. Staff recommends entering into an agreement with Kittelson & Associates for a not-to-exceed budget of $767,000 through June 30, 2025.

STAFF RECOMMENDATION:

It is recommended that the board of directors authorize the executive director to enter into a technical services agreement with Kittelson & Associates to carry out *Shasta Regional Active Transportation Network*, for a term ending June 30, 2025, not exceeding $767,000.

DISCUSSION:

Background - In preparation for the most recent cycle of the state's highly competitive Active Transportation Program (ATP), SRTA hired two different consultant teams to assist delivering agencies prepare more walking and biking infrastructure grant applications, and of higher quality. This approach turned the Shasta Region into one of the most successful counties in the state by having three out of six ATP projects approved for up to $24.7 million in ATP Cycle Five.

Development of New Grant Applications - SRTA and delivering agencies are partnering on the *Shasta Regional Transportation Network* effort to try and repeat this success in future ATP grant cycles and other programs offering discretionary active transportation funding. In February 2021, SRTA staff released an RFP for a consultant team to assist delivering agencies with public engagement, conceptual drawings, wayfinding system planning, as well as grant writing and evaluation. Unlike the *Shasta Regional Transportation Network's* predecessor, *Sustainable Shasta*, this project would hire only one consultant team for all tasks necessary to prepare competitive applications, reducing time and resources spent on an additional procurement as well as improving workflow, communications, and quality of products. The proposed consultant budget, covering all grant application preparation tasks for 10-20 active transportation infrastructure grant applications, is a not-to-exceed amount of $767,000.

Consultant Selection - SRTA issued an RFP on February 10, 2021. Four proposals were received and evaluated. All firms were invited to Zoom interviews with an evaluation panel comprising staff from

SRTA and delivering agencies (the cities of Redding, Anderson, and Shasta Lake; the county; and Caltrans District 2). The panel's consensus results are provided below.

Vendor Ranking	Scores	Total
	Maximum Possible Score→	150
1	Kittelson/Toole/EBA/AIM	132
2	TJKM	128
3	GHD/DP Engingeering	126
4	GMA/ARUP/North State Planning and Development Collective	103

Kittelson & Associates ranked highest overall. The deciding factors were the quality of their staff for the work to be done, technical expertise, proposal thoroughness, and value of services to be provided. The proposed scope of work (attached) will be incorporated into the technical services agreement (TSA) with the consultant.

The TSA will serve as a master agreement and general authorization to identify project needs based on the scope of work. As needs are identified, SRTA and Kittelson & Associates will develop tasks and negotiate fixed-fee budgets, based on rates from their proposal, for individual work authorizations. Staff has reviewed the rates, and they are reasonable and commensurate with rates from past projects. The project schedule will be defined once suitable projects and grant programs are identified.

ALTERNATIVES:

The board of directors may reject the staff recommendation. However, staff would need to issue a new RFP, reducing available time to make use of the Caltrans grant that is funding most of the project.

OTHER AGENCY INVOLVEMENT:

SRTA and delivering agency staff served as evaluators for the vendor proposals and interviews.

FISCAL IMPACT:

$467,000 from a Caltrans grant will fund public engagement, conceptual drawings, wayfinding, and a project summary report. Grant writing and evaluation services would be funded out of SRTA's Regional Non-Motorized Program. The fiscal impact to the agency depends on the number of applications requiring assistance and the amount of work needed for each one. Compensation for Kittelson & Associates' grant writing and evaluation services would not exceed $300,000.

Dan Little

Daniel S. Little, AICP, Executive Director

Attachment
Kittelson & Associates' Scope of Work

Ultimately, this project will identify a series of active transportation projects that will further develop regional and community active transportation connections through project designs, identify grant opportunities, and write ATP or similar grant applications to support local jurisdictions and SRTA in implementing the GoShasta vision of a network of low-stress, accessible facilities for people of all ages and abilities. The Shasta RATN will continue SRTA's path forward in identifying, funding, and implementing projects that support healthy and sustainable active transportation outcomes across the Shasta region.

Technical Approach

We propose to conduct the scope of work in three phrases to enable SRTA to prepare individual work orders for: initial project identification in Phase A, specific grant applications in Phase B, and final documentation in Phase C. This approach allows SRTA to have discretion over the amount of funds spent based on the number of grant applications ultimately prepared while enabling SRTA and its local partners the flexibility to ground truth and develop concept designs and implementation support for the most promising active transportation projects before moving into the concept design and grant writing phases.

Phase A: Project Development

This phase would be its own upfront work order authorized to identify, screen, and preliminarily scope the active transportation projects that are most promising within the region. This work would result in: (1) an agreed upon (by SRTA and the implementing agencies) set of projects to further develop; (2) a preliminary scope for each project; (3) assessment of previous work related to developing the project upon which this effort could build; and (4) scopes of work and budgets for each of the work orders to be used to prepare each grant application. This phase would consist of Task 1, Task 2.1, and Task 2.2.

Phase B: Grant Application Preparation

This phase would be structured into individual work orders budgeted to fit the scope of the projects to be included in each grant application. Phase B comprises Task 2.3, Task 2.4, Task 2.5, Task 3, Task 4, and Task 5.

Phase C: Final Documentation

This phase—consisting of Task 6—would be its own work order authorized to document the body of work and outcomes from this project.

Phase A: Project Development

Task 1. Grant Administration

TASK 1 PURPOSE Meeting reporting requirements for the grant funding and maintain clear communication between consultant team and SRTA regarding financial status of the project.

1.1 Invoicing

The Kittelson team will provide monthly invoices and progress reports to SRTA.

1.2 Reporting (SRTA Only)

The Kittelson team assumes SRTA will prepare the necessary reports for Caltrans using the information we provide in Task 1.1.

DELIVERABLES FROM TASKS 1.1 AND 1.2

/ Monthly invoices and progress reports (assumes total project duration is up to 26 months)

Task 2. Outreach and Stakeholder Communication

TASK 2 PURPOSE Facilitate clear communication between the consultant team, SRTA, and partner agencies to arrive at focused set of active transportation projects for grant applications. Generate forum for stakeholder input and, in-turn, support for the active transportation projects to be advanced to grant applications. Document engagement effort and input received.

2.1 Workshop

The key outcomes from this workshop include: (i) common vision for active transportation in the region; (ii) sharing best practices for safe transportation systems as well as for increased walking and biking; (iii) sharing information about project types and corresponding grant programs for funding different project types; (iv) developing consensus on priority active transportation projects for the region; and (v) arriving at agreement on the preliminary scope of the priority active transportation projects. Items (iv) and (v) are important to achieve as an outcome of this subtask to enable the consultant team and SRTA to appropriately scope and initiate the work orders necessary to prepare the grant applications in Phase B. We understand the workshop attendees will be SRTA, project partners, advisory committees, and community organizations.

To achieve the outcomes listed above, the Kittelson team will:

/ **Conduct a workshop planning meeting** with SRTA project manager and other key SRTA staff to confirm the agenda, meeting format, speakers, and materials to be developed and shared in advance as well as at the meeting.

/ **Conduct up to four pre-meetings** with SRTA and its partner agencies (i.e., cities of Anderson, Redding, and Shasta Lake and unincorporated Shasta County) to have an initial discussion of potential active transportation projects within each local jurisdictions. A key outcome of these discussions will be for Kittelson to obtain all existing information related to those potential projects to be able to further review and assess the projects prior to the workshop.

/ **Prepare meeting materials to be shared with attendees in advance** of the workshop. The meeting materials are anticipated to be: (i) a one-page, visual summary of the purpose of this project and the vision for active transportation in the region combination of maps; (ii) maps identifying the potential active transportation projects identified in the four pre-meetings; (iii) a table summary of the potential projects qualitatively compared to the criteria or characteristics used to assess relative competitiveness for grant funds. This packet of information would be shared with invited attendees in advance of the workshop.

/ **Organize the workshop** for a learning and collaborative experience. We propose organizing the workshop into three parts. Part 1 would consist of opening remarks by SRTA or the consultant team and a focused presentation with up to three speakers to cover: (i) the vision for active transportation in the region; (ii) best practices for active transportation planning and design; and (iii) overview of grant funds available for implementation. Part 2 would consist of facilitated breakout groups to be able to discuss the potential active transportation projects that would be positioned for grant funding. There would be four breakout groups organized by geography of unincorporated County, City of Anderson, City of Redding, and City of Shasta Lake. The breakout groups would discuss priority of the projects (i.e., rank from highest to lowest) and then the scope of the highest ranked projects. Two consultant team members would be assigned to each group to facilitate and take notes of the discussion. Part 3 would briefly bring the groups back together for closing remarks and information regarding next steps for continued engagement in advancing the projects toward implementation.

GoShasta! Burney Walk Audit

/ **Prepare a workshop summary** to capture the discussions and outcomes from each of the breakout groups. It would identify for each group, the priority projects and preliminary scopes of the highest priority projects. This information would be captured in a memorandum.

/ **Conduct a workshop closeout meeting** with SRTA and the four partner agencies. The purpose of this meeting would be to select the set of projects to be advanced into grant application preparation, confirm the types of grants to be pursued for each, and confirm the preliminary scopes for each project. This information would be communicated via the workshop summary memorandum and provided in advance of this meeting so all parties have the opportunity to review and consider the recommendations.

2.2 Project Administration

This subtask includes the ongoing meetings anticipated to be needed to help successfully complete the work under Phase B and Phase C. This subtask also includes the coordination and effort that will be needed to prepare the work orders for the specific grant applications to be developed in Phase B.

Meetings and Coordination

We propose the following regular coordination meetings to facilitate project communication throughout the duration of the effort to develop the grant applications and the ultimate final report.

Weekly Management Meetings with SRTA. Kittelson project manager and principal-in-charge will meet weekly with the SRTA project manager by phone or video conference (and other key SRTA staff if the SRTA project manager wishes to invite others). This weekly meeting will be to provide an update on scope, schedule, upcoming activities, budget, and any items in need of resolution for the projects under development. Given the total project duration is anticipated to be 26 months, we assume up to 100 such meetings and that these regular meetings would be up to 30 minutes each.

Weekly Management Meetings with SRTA and Agency Partners. Kittelson project manager and principal-in-charge will meeting with the SRTA project manager and a representative from each agency partner weekly via phone or video conference. The purpose of these meetings will be to discuss any items in need of resolution for the projects under development. Given the total project duration is anticipated to be 26 months, we assume up to 100 such meetings and that these regular meetings would be up to 30 minutes each.

The combination of these two regularly occurring meetings would provide a forum for resolving issues, including concerns or questions from delivering agencies based on public input, need for coordination with other project efforts, or other similar items that can surface during a project's development.

Ad-Hoc Meetings with SRTA and/or Agency Partners. In addition to the above, we have assumed up to six, two-hour meetings via phone or video conference that can be used for longer discussions with SRTA and/or the agency partners.

Work Order Development

Following the outcomes of Task 2.1, the Kittelson team will prepare draft scope of works, budgets, and specific schedules for further developing the projects and grant applications identified in Task 2.1 as priority and agreed upon for advancement by SRTA and the appropriate partner agency (or agencies). For the work order development, we assume we will prepare one draft scope of work, budget, and schedule per work order for review and comment by SRTA. We will then update a given work order's scope, budget, and schedule based on comments from SRTA leading to that work order's approval.

Each work order will specify the work to be conducted under Task 2.3, Task 2.4, Task 2.5, Task 3, Task 4, and Task 5. It will be tailored based on the type of project, preliminary scope of the project, and agreed upon grant (e.g., Active Transportation Program, Highway Safety Improvement Program, Sustainable Transportation Equity Project, etc.) for which it will be seeking funding. For the purposes of this scope, we assume we will prepare up to 15 work orders to prepare grant applications for specific projects. However, the specific number of grant applications to be completed will depend on the scope and scale of the projects selected to be developed and the type of grant applications. As part of the scoping of each task order, Kittelson will keep SRTA informed of the remaining budget for additional task orders and communicate the anticipated impact on the number of project concept designs and grant applications that will be feasible to develop under the contract total.

DELIVERABLES FROM TASKS 2.1 AND 2.2

Task 2.1

/ Prepare for and conduct pre-workshop meeting with SRTA
/ Prepare for and conduct up to four pre-workshop meetings with SRTA and each of its partner agencies (i.e., one per partner agency)
/ Prepare pre-workshop meeting materials for workshop attendees
/ Prepare workshop materials including speaker list, workshop posters, attendee list, power point presentations, refreshments, photos from workshop
/ Address workshop logistics such as location, invites for attendees, AV needs, etc.
/ Conduct and facilitate the workshop
/ Prepare Workshop Summary Memorandum
/ Conduct a workshop closeout meeting with SRTA and its partner agencies

Task 2.2

/ Weekly management meetings with SRTA
/ Weekly management meetings with SRTA and Agency Partners
/ Up to six (6) ad-hoc meetings with SRTA and/or Agency Partners
/ Meeting collateral: Project team roster, sign-in sheets, agendas, meeting notes, project updates (in meeting notes), presentation material, schedule of meetings
/ Up to fifteen (15) draft work orders depending on scope and scale of the project
/ Up to fifteen (15) final work orders depending on scope and scale of the project

Phase B: Grant Application Preparation

Prior to the start of Phase B, the Kittelson team will prepare specific work orders for the projects to be advanced into grant applications. The work orders will specify the activities under Task 2.3, Task 2.4, Task 2.5, Task 3, Task 4, and Task 5 that will be conducted for it – based on the project type and grant type. The following scope describes the type of work the Kittelson team anticipates as part of those work orders.

2.3 Public Engagement

The public engagement activities will be organized such that the conceptual design work from Task 3 will be integrated into the public engagement events. This will enable stakeholders and community members to provide input into the projects and experience (through virtual environments or the temporary built demonstrations) the potential improvements likely to be included in the grant application. This level of meaningful and experiential involvement in the projects' development can help garner further support for them.

Community Based Organization Collaboration

A core element of the public engagement plan will be to partner with a local Community Based Organization (CBO) (e.g., Shasta Living Streets) who is able to help provide direct and meaningful connections to community members and stakeholders. The CBO will be integrated into the selected engagement activities that are scoped as part of each of the grant application work orders.

Outreach Management

We will provide strategic advice and counsel, review project materials and reports, coordinate with SRTA and the project team, and monitor team communications throughout the project. In addition, we will attend regular coordination meetings with SRTA and project team members, as needed.

Stakeholder Database

We will develop and maintain a stakeholder database throughout the project's duration. This database will include stakeholder name, contact information as well as the preferred method of contact and potential key concerns and/or areas of project interest. We will work with SRTA and the project team to further identify key stakeholders.

GoShasta! Redding Public Workshop

Public Engagement Activity Options

Below are a number of different options for engagement strategies for building awareness of the project and soliciting community feedback. Once we meet with the project team, we can determine which engagement strategies to move forward with, and tailor the public engagement approach to best fit the project. Each work order will include a subset of the activities below based on the type of project and grant application being developed. To avoid outreach fatigue, we also suggest combining outreach activities for nearby projects when feasible. All materials will be created in both English and Spanish for each outreach activity.

Virtual or In-Person Community Workshops. We will coordinate and facilitate virtual or in-person community workshops to build awareness about the project, educate the public on potential improvements to the Shasta Region's active transportation infrastructure, and solicit feedback from the community on ways to enhance walking and biking in their neighborhoods. If the workshops are held virtually, the project team will host the meetings via a web-based application like Zoom. The workshops may include live map-based activities, pre-recorded video clips or presentations and live polling to engage participants in a dialogue on active transportation. If the workshops are held in-person, we will work with a local community center or school to host the event. We will also produce all interactive materials including boards, maps, displays, presentations, and pre-recorded video clips. After the community workshops, we will develop a summary of findings with all input collected from participants. Our scope and budget assumes up to 2 total virtual or in-person community workshops for the overall RATN.

Pop-up Workshop Series. We will organize and facilitate socially distanced pop-up workshops at community destinations, local events or key activity centers. We will work with local community-based organizations or social service agencies representing various disadvantaged communities to identify community events that the pop-up workshops could be hosted at. This will provide an opportunity for residents to learn more about active transportation infrastructure and provide their feedback on potential locations for walking and biking improvements. The workshops will include interactive games, activities, or demonstrations to encourage people to participate. We will develop all promotional materials and event logistics materials. After the pop-up workshops, we will develop a summary of findings with a compilation of all feedback received. During the pop-up workshop series, we will also identify participants who could potentially speak during the final presentations for task 6.3. Our scope and budget assumes up to 4 socially distanced pop-up workshops at community destinations, local events or key activity centers for the overall RATN.

Meeting-in-a-Box. We will develop and distribute a community engagement toolkit known as "Meeting-in-a-Box", which will be designed for community groups, neighborhood associations or family members to gather in-person (socially distanced) or virtually to share their input and ideas for active transportation improvements in the Shasta Region. The toolkit will consist of a guide, video clips, worksheets, graphics and maps that will prompt participants to lead a small group discussion at their own convenience. After completing their small group discussions, participants can send their completed toolkit to the project team for submission. We will design the toolkit and all promotional materials for building awareness about the toolkit. We will also coordinate with local communities-based organizations (including those representing disadvantaged populations), transportation groups and local agencies to encourage residents to lead their own small group discussion with the toolkit.

Youth Engagement Program. We will develop and implement a branded youth engagement program, which will be held throughout the public outreach and engagement effort. The program will provide a platform for youth in the Shasta Region to share a story of their experience walking or biking around their neighborhood and the city through photos, videos, artwork, poetry, short stories, or other creative formats. The objective of the exercise is to begin a dialogue about how active transportation infrastructure can impact their lives and those of their community. The project team will develop a summary of findings from the Youth submissions about personal experiences that will help to inform the development of the overall active transportation strategy. We will engage student participants through a grassroots outreach effort, including partnerships with local community-based organizations that work with youth, the school district, and charter schools.

2.4 Temporary Built Environment Demonstrations

The Kittelson team will support community organizations and local jurisdictions in implementing temporary built environment demonstrations as a means for generating community input and buy-in for the projects being developed and advanced to grant applications. The Kittelson team support will include planning and selecting up to four demonstration sites and projects with delivering agencies, as well as training for successful implementation.

The Kittelson team will also provide guidance on material selection and traffic control, and where needed, a sketch plan of the proposed demonstration. We will also engage a local CBO to further help coordinate logistics on the ground and outreach, including serving as ambassadors during the actual demonstrations.

We assume the demonstration projects will be conducted over a limited timeframe (e.g., a portion of a weekend). We also assume that the delivering agency will take responsibility for acquiring materials for the demonstration project, constructing the demonstration project, providing the necessary traffic control for the demonstration project, and disassembling the demonstration project. To the extent feasible, the demonstration projects will be coordinated with other engagement activities.

2.5 Technical Memo on Public Engagement and Stakeholder Communication

We will document the public engagement and stakeholder communication undertaken as part of the project and grant application development. The technical memorandum will be prepared near the close of the work orders authorized for Phase B so that the content of the memorandum can capture all activities that took place across the different work orders and informed the grant applications.

DELIVERABLES FROM TASKS 2.3, 2.4, 2.5

Task 2.3

/ Coordination and implementation of selected engagement activities

/ Schedules, notes, invitations, participation counts from outreach meetings, public engagement campaign, content for social media posts (English & Spanish); survey(s), results, and analysis of results; project layout boards

Task 2.4

/ PowerPoint presentation outlining the keys to successful demonstration project implementation

/ Brief memo outlining considerations for each selected demonstration project, including a sketch plan and traffic control guidance

/ Photos, video, and/or feedback from community

Task 2.5

/ Technical memorandum summarizing public engagement and stakeholder communication and results

  » One draft version for review and comment by SRTA project manager

  » One final version updated based on review by SRTA project manager

Task 3. Shasta Active Transportation Network Expansion

TASK 3 PURPOSE Develop the alignments and layouts for the projects selected to advance to grant applications. Arrive at alignments and layouts supported by the delivering agencies, SRTA and key implementation partners.

3.1 Conceptual Corridor Alignments and Layouts

The Kittelson team will develop up to three alignments for each selected project. The specific number of drafts per alternative alignment will be specified as part of each work order developed in Task 2.2. As part of this task, the Kittelson team will also develop supporting cross-sections and plan view layouts for the preferred alignments selected for each alternative. The specific number of cross-sections and plan view layouts will be specified as part of each work order developed in Task 2.2.

On-Street (Class II, III, IV) and/or Crossing Facilities

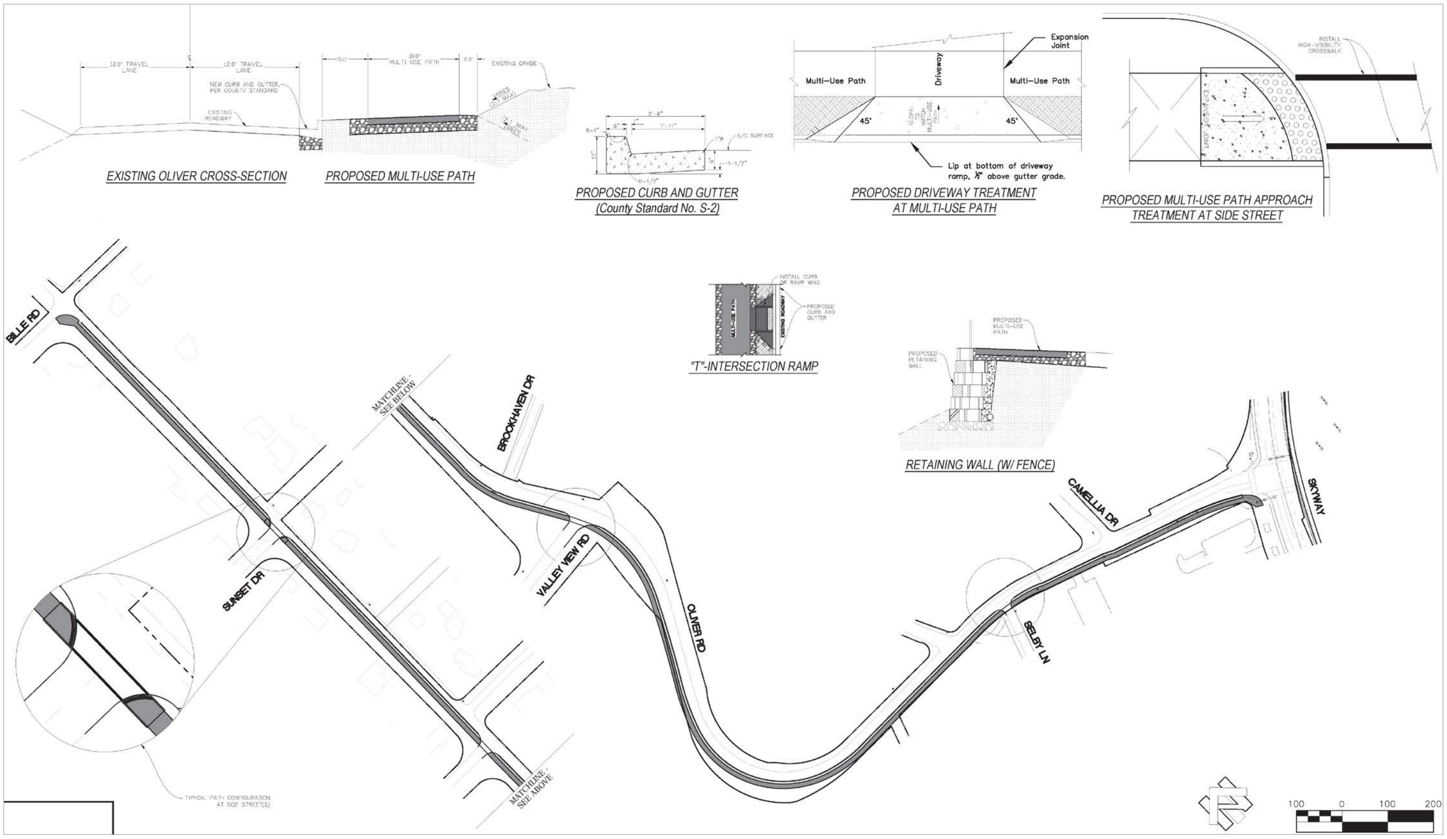
For the on-street facilities or elements of projects that are on-street facilities, the Kittelson team will develop concept drawings that illustrate the alignment, the cross-section of the roadway with the facility, and concept plan views showing treatment needs or calling out design changes needed at intersections along the alignment. The alignments and layouts will be done over scaled aerial imagery. It will take into account visible or observed conditions related to things like driveway access, transit stops/service, utilities, and constraints from right-of-way, land use, or environmental considerations. Developing the alignments and layouts will also take into consideration available data related crash data, traffic volume data, and vehicle speed data (e.g., previous or recent 85th percentile speed data). This task does not include traffic operations analysis, utility requests or coordination, or obtaining survey data. Grading, stormwater, or other detailed design will also not be included, but any related issues that are readily apparent from available information will be noted.

Off-Street Shared Use-Paths or Trails (Class I Facilities)

For projects that are comprised of off-street shared use path elements the Kittelson team will develop concept drawings that show the trail alignment, identify conflicts or obstructions with utilities and other existing features, as well as potential right of way impacts or acquisition needs. In doing so, the Kittelson team will prepare 40 scale layouts inclusive of cross sections, dimensions, obstructions, constraints, and photos accompanied by narrative of implementation considerations, the alternatives considered, and the ultimate recommended alignment. Twenty scale layouts will be developed where greater detail is necessary to ensure construction and right-of-way costs can be captured accurately in the cost estimate. Grading, stormwater, or other detailed design will not be included, but any related issues that are readily apparent from available information will be noted.

3.2 Alignment and Layout Recommendations (Including Preliminary Cost Estimates)

Using the alternatives developed in Task 3.1, the Kittelson team will work with SRTA and delivering agencies to identify a preferred alignment and corresponding plan view and cross-sections for each project advancing into a grant application.



The regular check-in meetings with SRTA and the delivering agencies scoped in Task 2.2 and the input from the public engagement activities in Task 2.3 and Task 2.4 will be used to inform the recommended projects. In addition to those consensus-building activities, the consultant team will qualitatively assess the alternatives for benefits and tradeoffs as related to road user experiences and also competitiveness for grant funding.

For the agreed upon alignments and layouts for the projects, the Kittelson team will advance the alignments, layouts, plan view concepts, and cross-sections to levels of detail suitable to support competitive grant applications for each project. The designs will also be suitable for developing cost estimates in support of the grant application. It will include recommended solutions for challenging or problem intersections building off the alternatives explored in Task 3.1. Information such as right-of-way needs or impacts, issues related to culverts or utilities, and potential environmental impacts will be identified. Where feasible with the available information, potential solutions for those issues will be identified. However, each project will need to undergo PS&E and, may in some instances, environmental study/clearance, after securing grant funds to support implementation.

The design activities in this subtask will be of sufficient detail to identify a preferred alignment and design that is feasible to construct and a cost estimate that enables SRTA and the delivering agency to secure funding to advance the project to implementation—through final design, environmental clearance, and to construction. This task will also include grant-related supporting documents such as Engineer's Cost Estimate, Engineer's Checklist, right-of-way checklist, and other requirements determined by the ATP or other grant programs.

3.3 Wayfinding Signage and Trail Maps

The Kittelson team will work with SRTA and local jurisdictions to design wayfinding and other signage, including a physical trail map to be used at trailheads and other strategic locations. Sign design will build off other past and present wayfinding efforts, including the City of Redding's efforts. Our team will develop up to two branding concepts that may be applied to a variety of sign types and configurations consistent with the Manual for Uniform Traffic Control Devices (unless this is not desired). Our team will also provide a wayfinding protocol that outlines sign types and placement guidelines. In addition, we will develop a web-accessible active transportation/trail map. To keep development costs down, the web-accessible map could use open-source base maps. We will work with SRTA to determine the most suitable platform that balances aesthetics, functionality, and cost.

3.4 Technical Memo for Alignments, Layouts, and Wayfinding System

We will document the alignments, layouts and wayfinding system developed as part of advancing each of the selected projects towards grant applications. The technical memorandum will be prepared near the close of the work orders authorized for Phase B so that the content of the memorandum can capture all activities that took place across the different work orders and informed the grant applications.

DELIVERABLES FROM TASK 3

Task 3.1

/ Notes from walk/bike audits and other corridor analyses

/ Up to three different alignment and layout alternatives for up to 15 projects
   » Alignment and layout alternatives will be GIS or CAD over aerial photos for base maps

Task 3.2

/ Recommended alignments and PSR-Equivalent layouts for 10 to 20 corridors in and between SGAs (including cross sections). Grant-related supporting documents

Task 3.3

/ Sketches or photos of wayfinding system's different sign types and URL to web-accessible trail map

Task 3.4

/ Technical memorandum summarizing corridor alignment and layout results, as well as the agreed-upon wayfinding system
   » One draft version for review and comment by SRTA project manager
   » One final version updated based on review by SRTA project manager

Task 4. Grant Writing

Fundamentally, this contract is about moving the Shasta Regional Transportation Authority's (SRTA) transportation system forward, improving accessibility, mobility, and health for residents and visitors in the region by connecting, expanding, and improving the existing pedestrian and bicycle network and facilities. Our team will assist SRTA in applying for active transportation grant funding, including helping with the most important step—putting forth projects that strategically align with active transportation grant funding opportunities, such as the California Department of Transportation's (Caltrans) Active Transportation Program, Highway Safety Improvement Program (HSIP), and Sustainable Communities Program, Strategic Growth Council's (SGC) Transformative Climate Communities (TCC), and California Natural Resource Agency's (CNRA) Urban Greening, to name a few.

4.1 Technical Assistance

Our team will evaluate each proposed project against historically funded projects to ensure consistency with the grant program funding goals and competitiveness. We will work to review and identify the best, most competitive opportunities. Some projects might be better than others and we will help SRTA make those assessments so resources are not lost on poor project candidates. Once SRTA is confident in pursuing funding, our team will familiarize ourselves with the project, meeting with local agency staff, preparing compelling narratives, and coordinating and enhancing all aspects of the grant application, including materials – photos, drawings, and analysis. We will align applications to writer's expertise, write succinctly to the evaluation criteria, ensure consistency throughout all applications, and strengthen applications by incorporating SRTA comments.

4.2 Grant Writing and Integration of Feedback

It is our goal to make the grant writing process easier. As such, we will provide a checklist of all items needed for each type of grant application/project and work with SRTA to obtain relevant information for inclusion in each application. While granting agency guidelines are changed from year-to-year, much of the information requested generally comprises similar materials. Therefore, we expect to establish project and process checklists early to facilitate overall project readiness, as well as ensure that required information is not delayed, and readily available prior to grant writing commencing.

As noted in the RFP, SRTA will be responsible for obtaining and providing EBA with the necessary background data to develop narrative responses and prepare "evaluator-friendly" exhibits. As such, we will prepare template and brand guidelines for all graphic materials and support elements. Data provided by the SRTA will be analyzed and translated into the templates providing the ability

Klamath Falls Two-Way Separated Bike Lane

to tell a more-focused story within the application while also delivering a consistent look within each application and across all applications for the contract.

A critical component of most active transportation grant applications is a compelling narrative that explains local and regional need for the proposed project. Our team is experienced in crafting these compelling narratives by using engaging language and storylines and using them to develop compelling grant applications. After the actual message and story is crafted and narrative responses are prepared, we will prepare draft applications with all elements, including the prepared exhibits. We will ensure issues can be rectified and areas of weakness strengthened early in the process via an independent quality assurance/quality control (QA/QC) process, in which independent staff will review and provide recommendations on the draft. Along with our team's QA/QC review, the SRTA's process to review prepared drafts and involve a separate panel (Task 5) to place applications under a mock scoring evaluation process will ensure applications are of the highest possible quality.

DELIVERABLES FROM TASK 4

/ Draft and final versions of documents and applications for up to 15 grant applications (total grants to be determined based on individual work order scopes as noted in Task 2).

Task 5. Shasta's Grant Application Review Panel

TASK 5 PURPOSE Increase the competitiveness of the grant applications by improving how the proposed projects are presented and described in the applications themselves.

5.1 Review DRAFT Grant Applications and Provide Feedback

The Kittelson team will identify up to five experts to review the draft active transportation program grant applications to provide objective and critical feedback to help improve the competitiveness of the grant applications. To facilitate this contractually, this review will be integrated into each of the work orders for the grant application development (i.e., the work orders developed in Task 2.2).

The experts will be familiar with the different competitive active transportation funding programs and the California Transportation Commission's Active Transportation Program. The panel review will be integrated into individual work authorizations. The review will use the grant programing scoring rubrics to generate anticipated scores and be the basis for identifying areas or ways in which the draft applications could be improved.

DELIVERABLES FROM TASK 5

/ Bulleted list of critical feedback and recommendations (based on grant program scoring rubrics and guidance) specific to each application

Phase C: Final Documentation

Prior to the start of Phase C, the Kittelson team and SRTA would confirm the scope and effort for the final documentation. Based on that determination, a work order for the final documentation effort would be executed.

Task 6. Final Report

TASK 6 PURPOSE Prepare final documentation to preserve the information, considerations, input, deliverables, and process for developing the grant applications prepared in Phase B.

This task involves the preparation of the draft final report, final report, as well as the presentation of the final report to decision makers. The final report is the compilation of technical memos that were prepared for previous tasks over the course of the project and includes the project results in one document. This task will likely constitute its own work authorization.

6.1 Draft Final Report

The Kittelson team will prepare a draft final report that is a compilation of the technical memorandums, deliverables, and outcomes of the work that led to the grant applications. The draft final report will also include discussion of next steps as it relates to implementing each of the recommended projects. To ensure the draft final report will capture the information and detail needed, Kittelson will prepare and provide an annotated outline of the final report to SRTA project manager for comment prior to drafting the full final report. From the agreed upon annotated outline, we will draft the final report. The draft final report will be provided to SRTA project manager for review and comment.

6.2 Final Report

We will revise the draft final report based on comments from SRTA project manager to produce the final report. In addition to delivering the final report in electronic form (i.e., Word and PDF formats), we will also produce and deliver up to 10 color hard copies of the final report.

6.3 Presentation of the Final Report

Our team will prepare power points for presenting the final report (totaling 6-8 final presentations) to project team boards and councils, Caltrans executive management, SRTA board, and advisory committees. Participants from engagement meetings (Task 2.3) will be invited to speak at the final presentations.

DELIVERABLES FROM TASK 6

Task 6.1

/ Draft final report with implementation and next steps

Task 6.2

/ Final report (10 color copies) in printed and digital formats

Task 6.3

/ Presentations (6-8) to project team boards and councils, Caltrans executive management and SRTA board

Management Approach

The Kittelson team is led by our project manager, **Matt Braughton, RSP**. He brings a strong reputation as an effective project manager and active transportation practice leader. He will be our team's primary point of contact for SRTA's project manager and responsible for overseeing the successful project development and grant applications for SRTA and the delivering agencies.

As shown in our org chart (**Figure 1**), each task has a designated task leader and supporting staff who will contribute to the work in that task and producing the associated deliverables. The task leaders will be responsible for working with the supporting staff on each task to produce the deliverables associated with that task. Task leaders will work directly with Matt, as the project manager, to be sure work and deliverables align with SRTA's expectations. As the overall team's project manager, Matt will work with the task leaders to direct the work to be completed, conduct quality control of the work and associated deliverables, ensure the work remains on schedule and within budget, and, as-needed, work with the team to problem solve around issues that may arise.

Erin Ferguson, PE, RSP is our team's principal-in-charge and will support Matt by providing additional technical expertise and conducting quality assurance activities to ensure the work conducted and deliverables produced follow Kittelson's quality control procedures. As each work order is identified and approved, Matt and Erin will identify the best resources from across our teams combined staff to make sure that the project development and grant writing team is set up for success from the start and has an appropriate staff mix to carry the work order to completion.

Attachment A

Kittelson & Associates, Inc.—Team Cost Proposal (Page 1 of 3)

		Kittelson & Associates, Inc.								
	Staff Name and/or Classification	Erin Ferguson / Principal Engineer	Matt Braughton / Associate Planner	Sr. Principal Engineer / Planner	Senior Engineer / Planner	Engineer / Planner	Technician II	Associate Technician	Hours Subtotal	Total Cost
	Full Rates	$244.71	$195.89	$315.29	$162.34	$146.22	$115.70	$166.02		
Phase A: Project Development										
Task 1: Grant Administration										
1.1 Invoicing	Hours		36						36	$ 7,052.04
1.2 Reporting (SRTA Only)	Hours								0	$ -
Task 1 Subtotal		0	36	0	0	0	0	0	36	$ 7,052.04
Task 2: Outreach and Stakeholder Communication										
2.1 Workshop	Hours	48	78	12	32			60	230	$ 45,965.06
2.2 Project Administration	Hours	58	250			115			423	$ 79,980.98
Phase B: Grant Application Preparation	Hours								0	$ -
2.3 Public Engagement	Hours	16	60		50		40		166	$ 28,413.76
2.4 Temporary Built Environment Demonstrations	Hours	16	32			24			72	$ 13,693.12
2.5 Technical Memo on Public Engagement and Stakeholder Communication	Hours	8	16						24	$ 5,091.92
Task 2 Subtotal		146	436	12	82	139	40	60	915	$ 173,144.84
Task 3: Shasta Active Transportation Network Expansion										
3.1 Conceptual Corridor Alignments and Layouts	Hours	24	32	15		150	40	40	301	$ 50,072.67
3.2 Alignment and Layout Recommendations (Including Preliminary Cost Estimates)	Hours	24	48	32		250	50	30	434	$ 72,685.64
3.3 Wayfinding Signage and Trail Maps	Hours	16	12						28	$ 6,266.04
3.4 Technical Memo for Alignments, Layouts, and Wayfinding System	Hours	16	24			32			72	$ 13,295.76
Task 3 Subtotal		80	116	47	0	432	90	70	835	$ 142,320.11
Task 4: Grant Writing										
4.1 Technical Assistance	Hours	8	24			80	32		144	$ 22,059.04
4.2 Grant Writing and Integration of Feedback	Hours	4	12		12				28	$ 5,277.60
Task 4 Subtotal		12	36	0	12	80	32	0	172	$ 27,336.64
Task 5: Shasta's Grant Application Review Panel										
5.1 Review DRAFT Grant Applications and Provide Feedback	Hours	4	8						12	$ 2,545.96
Task 5 Subtotal		4	8	0	0	0	0	0	12	$ 2,545.96
Phase C: Final Documentation										
Task 6: Final Report	Hours								0	$ -
6.1 Draft Final Report	Hours	8	16		24		16		64	$ 10,839.28
6.2 Final Report	Hours	4	12		16		8		40	$ 6,852.56
6.3 Presentation of the Final Report	Hours	8	64				12		84	$ 15,883.04
Task 6 Subtotal		20	92	0	40	0	36	0	188	$ 33,574.88
Labor Total	Hours	**262**	**724**	**59**	**134**	**651**	**198**	**130**	**2158**	**$ 385,974.47**
Other Direct Costs										
Description	*Rate*	*Unit*	*Quantity*	*ODC Total*						
Mileage	$0.560	mile	8800	$ 4,928.00						
Lodging	$150.00	per night per room	40	$ 6,000.00						
Meals	$50	per day per person	40	$ 2,000.00						
Printing				$ 2,000.00						
Set aside for up to three Task 5 Experts				$ 15,000.00						
CBO Involvement by Shasta Living Streets				$ 18,000.00						
*Expenses are estimated and assume 20 trips. Actual expenses will be refined in the work orders and billed at cost.										
Kittelson Expense Total				**$ 47,928.00**						
Firm Totals (Labor and Expenses)										**$ 433,902.47**
Grand Total for Team (Labor and Expenses)										

Kittelson Note: Actual rates for key personnel are shown above. Additional staff will be added at the time services are performed. Actual rates will be invoiced, overhead and profit will be locked for duration of the project.

Toole Design Group										Evan Brooks Associates						
Joel Schaffer / Engineer III	Gwen Shaw / Engineer II	Kristen Lohse / Senior Urban Designer	Senior Engineer	Project Engineer	Senior Planner	Planner II	Graphic Designer	Hours Subtotal	Total Cost	Daniel Bartelson / Principal-Project Manager	Jenna Tourje / Lead Grant Writer-Transportation Planner	Kevin Nord / Grant Writer-Transportation Planner	Technical Staff (Benefit-Cost/ Graphics/Photos/ Other)	Admin. Support	Hours Subtotal	Total Cost
$137.00	$104.00	$160.00	$186.40	$166.25	$182.20	$125.80	$100.15			$190.00	$150.00	$125.00	$95.00	$75.00		
					10			10	$ 1,822.00						0	$ -
								0	$ -						0	$ -
0	0	0	0	0	10	0	0	10	$ 1,822.00	0	0	0	0	0	0	$ -
32								32	$ 4,384.00						0	$ -
14								14	$ 1,918.00						0	$ -
								0	$ -						0	$ -
								0	$ -						0	$ -
8	80		4		4		24	120	$ 13,294.00						0	$ -
								0	$ -						0	$ -
54	80	0	4	0	4	0	24	166	$ 19,596.00	0	0	0	0	0	0	$ -
60	60		20	20		40		200	$ 26,545.00						0	$ -
80	60		20	40		20		220	$ 30,094.00						0	$ -
		80				60	80	220	$ 28,360.00						0	$ -
								0	$ -						0	$ -
140	120	80	40	60	0	120	80	640	$ 84,999.00	0	0	0	0	0	0	$ -
					14	36		50	$ 7,079.60	45	70	70	100		285	$ 37,300.00
					5			5	$ 911.00	163	213	222	50		648	$ 95,420.00
0	0	0	0	0	19	36	0	55	$ 7,990.60	208	283	292	150	0	933	$ 132,720.00
								0	$ -	12					12	$ 2,280.00
0	0	0	0	0	0	0	0	0	$ -	12	0	0	0	0	12	$ 2,280.00
								0	$ -						0	$ -
								0	$ -						0	$ -
								0	$ -						0	$ -
								0	$ -						0	$ -
0	0	0	0	0	0	0	0	0	$ -	0	0	0	0	0	0	$ -
194	**200**	**80**	**44**	**60**	**33**	**156**	**104**	**871**	**$ 114,407.60**	**220**	**283**	**292**	**150**	**0**	**945**	**$ 135,000.00**

Description	*Rate*	*Unit*	*Quantity*	*ODC Total*
Rental Car	$100.000	per day	6	$600.00
Hotel	$150	per night per person	5	$750.00
Meals	$50	per day per person	6	$300.00

*Expenses are estimated. Actual expenses will be refined in the work orders and billed at cost.

Toole Design Expense Total $1,650.00

$116,057.60

Description	*Rate*	*Unit*	*Quantity*	*ODC Total*

*Expenses are estimated. Actual expenses will be refined in the work orders and billed at cost.

EBA Expense Total $0.00

$135,000.00

Kittelson & Associates, Inc.—Team Cost Proposal (Page 3 of 3)

AIM Consulting							Team Total	
Outreach Oversight	Electronic Communications Designer	Graphics Designer	Outreach Manager	Outreach Coordinator	Hours Subtotal	Total Costs	Hours Total	Cost Total
$146.32	$138.61	$88.77	$73.15	$51.21				
					0	$ -	46	$ 8,874.04
					0	$ -	0	$ -
0				0	0	$ -	46	$ 8,874.04
16	8	8	27	24	83	$ 7,364.25	345	$ 57,713.31
8			12	16	36	$ 2,867.72	473	$ 84,766.70
					0	$ -	0	$ -
75	22	72	264	344	777	$ 57,342.70	943	$ 85,756.46
10			24	32	66	$ 4,857.52	258	$ 31,844.64
4		6	16	24	50	$ 3,517.34	74	$ 8,609.26
113	30	86	343	440	119	75,949.53	2093	$ 268,690.37
					0	$ -	501	$ 76,617.67
					0	$ -	654	$ 102,779.64
					0	$ -	248	$ 34,626.04
					0	$ -	72	$ 13,295.76
0				0	0	$ -	1475	$ 227,319.11
					0	$ -	479	$ 66,438.64
					0	$ -	681	$ 101,608.60
0				0	0	-	1160	$ 168,047.24
					0	$ -	24	$ 4,825.96
0				0	0	$ -	24	$ 4,825.96
					0	$ -	0	$ -
					0	$ -	64	$ 10,839.28
					0	$ -	40	$ 6,852.56
					0	$ -	84	$ 15,883.04
0				0	0	$ -	188	$ 33,574.88
113	**30**	**86**	**343**	**440**	**119**	**$ 75,949.53**	**4986**	**$ 711,331.60**
Description				*Rate*	*Unit*	*ODC Total*		
Mileage						$ 1,400.00		
Meeting Expenses						$ 900.00		
Printed Materials						$ 2,000.00		
Translation						$ 1,000.00		
Notification						$ 150.00		
*Expenses are estimated. Actual expenses will be refined in the work orders and billed at cost.								
AIM Expense Total						$ 5,450.00		
						$ 81,399.53		
								$ 766,359.60