

## **SCOPE OF WORK**

### **Move OC: A Vibrant Path to Active Transportation**

#### **INTRODUCTION:**

The Orange County Transportation Authority (OCTA) is seeking a consultant team to aid in the preparation of its next active transportation plan: Move OC (Plan). This Plan shall guide future investments in infrastructure, programs, policies, and funding strategies that advance the vision of a county where people of all ages and abilities can safely and easily choose walking, bicycling, and rolling for their everyday trips. The Plan shall provide a goal-driven framework to improve the accessibility, safety, and convenience of active transportation across Orange County. To ensure the Plan reflects the unique needs of communities, planning and outreach efforts shall be organized around four geographic subregions within the county.

A robust, multi-phase public outreach process shall shape the development of the Plan's vision, goals, objectives, and performance metrics. Outreach methods shall include in-person events, virtual workshops, interactive pop-ups, surveys, social media campaigns, and educational activities focused on pedestrian and bicycle safety, social media, and open feedback.

In addition, OCTA shall coordinate with local jurisdictions to compile a detailed inventory of existing infrastructure, plans, programs, and key data such as demographics, land use, safety records, and mode share. These inventories, combined with public input, will inform recommendations that are practical, equitable, and aligned with the Plan's long-term vision.

All elements of the Plan shall be grounded in the Plan's goals and objectives. The outcome shall be a comprehensive, actionable roadmap to build a more inclusive, connected, and user-friendly active transportation network for Orange County.

#### **OVERALL PROJECT OBJECTIVES:**

- Identify the existing components of Orange County's active transportation network.
- Conduct an extensive, multi-phase public outreach campaign to understand the active transportation needs, priorities, and concerns of residents in each geographic area of Orange County.
- Collaborate with institutional stakeholders to ensure the Plan aligns with existing local and regional goals, plans, and initiatives.
- Develop a cohesive vision, goals, objectives, and metrics (VGOMs) that center around the idea that residents of all ages and abilities can easily choose active transportation as a primary mode of travel for everyday trips. The consultant shall be responsible for developing the VGOMS and ensuring they guide all analysis, findings, and recommendations throughout the Plan.

- Guidance for use of VGOMS in project, policy, and funding development.
- Evaluate current and anticipated funding opportunities at local, state, and federal levels to ensure the Plan's recommendations are financially sustainable and adaptable to future conditions.

### **Task 01: Grant Kickoff and Quarterly Invoicing/Reporting**

OCTA shall hold a kick-off meeting with California Department of Transportation (Caltrans) and Southern California Association of Governments (SCAG) staff to coordinate project initiation. OCTA shall undertake quarterly invoicing and reporting to Caltrans staff throughout the project. This task is for OCTA use only.

## **PROJECT TASKS:**

### **TASK 1: Project Management and Meetings**

#### **Task 1.1: Project Kick-off Meeting with consultant**

The consultant team shall hold an initiation meeting with OCTA staff to discuss the project, schedule, potential Project Development Team (PDT) members, coordination with the grant and oversight agencies, SCAG and Caltrans, as well as other relevant administrative matters.

OCTA and the consultant staff (collectively referenced as the Project Team) shall discuss items such as communication protocol, meeting frequency, progress reporting, scheduling and invoicing, and other relevant project information. The consultant shall also be ready to discuss the initial PDT membership list for discussion at this meeting (See Task 1.3). The consultant staff shall summarize the meeting(s) with key action items identified. SCAG/Caltrans staff shall be invited to attend as appropriate.

#### **Task 1.2: Project Coordination and Team Meetings**

The consultant team staff shall lead virtual bi-weekly (with the option to move to monthly, if appropriate) meetings with the Project Management Team (PMT), consisting of the OCTA Project Manager and consultant Project Manager and support staff, to ensure effective communication on upcoming tasks and verify the project is proceeding on schedule and within budget.

The Consultant shall develop topics for discussion and provide an online tracking sheet with meeting notes and key actions accessible for viewing by the PMT. The duration of this project is assumed to be up to but not exceeding thirty (30) months.

#### **Task 1.3: Project Development Team and Meetings**

The project shall leverage existing and grow new partnerships among countywide stakeholders to build momentum and sustain efforts to develop a new active transportation plan for the County. A diverse PDT shall provide general feedback, guide

analysis, help facilitate stakeholder and public engagement, and provide comments on draft documents.

Based on the draft list of stakeholders developed in Task 1.1, the PMT shall establish the PDT to guide development of the project. Anticipated involvement in the project by the PDT entails the following:

1. **Advise** the PMT on the development of project vision/goals/objectives/metrics, data needs, outreach and engagement efforts, and project team deliverables.
2. **Identify** opportunities to cross-leverage the Plan activities with local/regional agency, advocate, and enforcement activities and programs.
3. **Engage** directly with residents and other stakeholders in support of developing the Plan.
4. **Provide Feedback on** the project’s progression to ensure effective use of grant funds and develop a comprehensive and actionable active transportation plan.

<b>Task</b>	<b>Task Deliverable (<i>deliverable specifics</i>)</b>
1.1	<i>Consultant Kick-off (Agenda and notes)</i>
1.2	<i>Project Management, Invoicing, and Meetings (Agenda and notes for all meetings)</i>
1.3	<i>PDT and Meetings (Agenda and notes for all meetings)</i>

**TASK 2: Public and Stakeholder Engagement**

Engaging the public and key stakeholders is an important component for the Plan planning process. This engagement ensures that the community and stakeholders are informed about the project, have opportunities to provide input on their experience with active transportation, and share the direction of the Plan. Through public feedback, OCTA will gain valuable insight on how people currently walk, bike, and roll in Orange County, what barriers they face, and what improvements they want to see.

The engagement process will be multi-faceted and well documented to ensure that all input is captured and reflected in the Plan. Activities shall include community events, virtual and in-person workshops, surveys, and coordination with community-based organizations. These efforts will ensure that input from residents and stakeholders meaningfully informs the plan’s analysis and recommendations.

**Task 2.1: Public Engagement Plan**

The consultant team shall develop a two-phase Public Engagement Plan (PEP) in consultation with the OCTA project team. The PEP shall outline the outreach approach using the tools and strategies outlined in tasks 2.2 – 2.9. This subtask includes the development of the PEP, as well as summary reports for both phases of outreach and a final report on the Public and Stakeholder Engagement task. These documents shall be included as an appendix of the Plan.

**Task 2.2: Institutional Engagement**

The project shall require regular updates to OCTA's standing committees. This will include preparing presentation materials to be delivered by the OCTA project manager for two presentations (six total) at each of the following OCTA standing committees: Technical Advisory Committee, bicycle and pedestrian subcommittee, and OCTA Regional Transportation Planning Committee and Board of Directors meeting.

### **Task 2.3: Stakeholder Survey**

In coordination with the PMT, the consultant shall develop and conduct up to two online surveys targeting institutional active transportation stakeholders in Orange County. This may include Caltrans, cities, County of Orange, SCAG, and other active transportation stakeholders as necessary. This survey will be in support of the development of the Plan VGOMs, potential recommendations or areas of analysis, as well to gather infrastructure and non-infrastructure existing conditions data. The consultant shall provide analysis and an infographic of the survey results.

### **Task 2.4: Public Survey**

In coordination with the PMT, the consultant shall develop and conduct up to two online community surveys of residents of Orange County. The survey shall target the general public to assess needs, desires, behaviors, and attitudes relating to active transportation. Timing, exact content, distribution, and method shall be developed and finalized in coordination with the PMT. The consultant shall provide analysis and an infographic of the survey results.

### **Task 2.5: Targeted Interaction**

The consultant shall employ various in-person targeted interaction methods to engage with the public at existing local events. Tactics such as pop-ups and intercept teams for outreach targeting specific events, neighborhoods, or geographic areas will likely be used but the consultant team is encouraged to explore all options to drive engagement with the project.

### **Task 2.6: Virtual Engagement**

The consultant shall host two virtual open house/webinar events per phase with the purpose of the events being to inform the public of the project and solicit feedback during key points of the project. The Consultant shall provide a draft and final version of meeting notes for each of the outreach meetings.

### **Task 2.7: In-Person Engagement**

The consultant shall conduct one in-person event per geographic planning area per phase (eight total events) with the goal of providing information on the Plan planning effort, soliciting feedback on plan elements, and delivering bicycle and pedestrian safety education in the form of an interactive event. The consultant shall provide a draft and final version of meeting notes for each of the outreach meetings.

### **Task 2.8: Community-Based Organization (CBO) Coordination/Stipend**

The consultant shall use existing/develop CBO partnerships for the project and utilize the CBOs to engage with the public and residents directly. The consultant shall provide a stipend for outreach efforts undertaken by the CBOs on behalf of the project.

### **Task 2.9: Digital Media Content**

The consultant shall assist the OCTA Outreach Team in the development of content used to keep the OCTA project website and social media channel updated. This may include regular project updates, webpage copy, and social media copy. The consultant shall draft and distribute digital communications toolkits, ads and eblasts.

### **Task 2.10: Collateral Development and Branding**

The consultant shall develop and produce all collateral materials like flyers, fact sheets, and infographics and ensure all materials and digital media are multilingual (Spanish and Vietnamese and other languages upon request). The consultant shall develop branding concepts for the Plan.

<b>Task</b>	<b>Deliverable</b>
2.1	<i>Community Engagement Plan (memo), phase summary memos (two memos), and final community and stakeholder engagement report (Final report section)</i>
2.2	<i>Institutional Engagement, six presentations, (Draft and final)</i>
2.3	<i>Stakeholder Survey (Draft survey, final survey, survey summary)</i>
2.4	<i>Public Survey (Draft survey, final survey, survey summary)</i>
2.5	<i>Targeted Interaction (Notes/summary)</i>
2.6	<i>Virtual Engagement (Notes/summary)</i>
2.7	<i>In-person Engagement (Notes/summary)</i>
2.8	<i>CBO Coordination/Stipend</i>
2.9	<i>Digital Media (Content and support)</i>
2.10	<i>Collateral Development and Branding</i>

### **TASK 3: VGOMs and Baseline Data**

The preliminary vision of the Plan is to establish a path to a transportation future where residents of all ages and abilities can easily choose active transportation as a mode of travel for everyday trips. Task 3 lays the foundation for the Plan by focusing on two critical elements:

- 1) Establishing VGOMs for the Plan that are clear and actionable, and
- 2) Gathering data and insights that create a comprehensive picture of current active transportation conditions in Orange County.

To accomplish this, the consultant shall be responsible for refining the preliminary vision, noted above, and creating measurable VGOMs in collaboration with OCTA and stakeholders. At the same time, the consultant shall gather and analyze data on current

infrastructure, demographics, land use, and travel behavior. This data shall serve as the baseline for all recommendations made in later tasks.

It is essential that the VGOMs are not developed in isolation. Instead, they should be directly informed by the existing conditions and used as the foundation for evaluation and shaping the recommendation in Task 4. The work in Task 3 will not only support technical analysis but also serve as a long-term resource for OCTA during implementation of the final Plan. The consultant shall be expected to propose innovative approaches, appropriate to Orange County, and develop the VGOMs that are actionable, equitable, and implementable.

### **Task 3.1: Develop and Draft VGOMs**

The consultant shall develop draft VGOMs building off the preliminary vision statement. This process shall be documented and synthesized into a Draft VGOMs Memo for review and comment by OCTA and PDT. The development of the VGOMs shall be done in close collaboration with and vetted through OCTA staff, as well as the PDT as they will be the foundation of the analysis and recommendations done within the Plan. The VGOMs shall be based in the baseline data gathered in Tasks 3.3 – 3.5 as the analysis and recommendations undertaken in Task 4 will be contingent on Task 3.

### **Task 3.2: Final VGOMs**

Incorporating feedback from the project team and PDT, the consultant shall refine the VGOMs. The consultant shall develop a Final VGOMs Memo for review and approval by the project team. Content from the Final VGOMs memo shall be incorporated into the draft/final plan documents.

### **Task 3.3: Existing Conditions: Infrastructure/Non-infrastructure**

- The consultant shall gather and inventory existing bicycle and pedestrian infrastructure including but not limited to bikeways, sidewalks, end-of-trip facilities, school locations, transit stops, and other facilities pertinent to the evaluation of active transportation travel behavior and infrastructure availability.
- The consultant shall gather and inventory pertinent local, regional, and state active transportation planning documents and policy guidance including but not limited to active transportation plans, bikeway plans, pedestrian plans, and active transportation policy related documentation.
- The consultant shall work with the PDT and project stakeholders to gather and inventory active transportation non-infrastructure education, encouragement, safety related programming efforts and initiatives.

### **Task 3.4: Existing Conditions: Demographics and Land-use Data**

- Gather and inventory demographics and land-use data in support of the Plan's existing conditions, transportation and safety, and analysis sections.
- Work with the PDT and project stakeholders to gather and inventory any data that is not readily publicly available.

- The goal of this subtask is to develop an accurate picture of land-use and demographics in Orange County such that the analysis done and recommendations made in Task 4 are responsive to existing conditions. This data will be used in the analysis portion of the project as well as a resource for OCTA and the implementation of the Plan.

**Task 3.5: Existing Conditions: Transportation and Safety Data**

- Gather and inventory available active transportation travel models, as well as other travel and safety data to evaluate travel behavior such as streetlight, crash data, near-miss data, and other appropriate sources.
- The goal of this subtask is to develop an accurate representation of active transportation activities in Orange County such that the analysis and recommendations made in Task 4 are grounded in accurate existing conditions. This data will be used in the analysis portion of the project as well as a resource for OCTA and the implementation of the Plan.

<b>Task</b>	<b>Deliverable</b>
3.1	<i>Draft VGOMs Memo</i>
3.2	<i>Final VGOMs Memo</i>
3.3	<i>Draft and final findings summary memo</i>
3.4	<i>Draft and final findings summary memo</i>
3.5	<i>Draft and final findings summary memo</i>

**TASK 4: Analysis and Recommendations**

The consultant shall ensure that all recommendations developed in Task 4 are clearly and directly aligned with the VGOMs established in Task 3. VGOMs should serve as the guiding framework for evaluating alternatives, prioritizing actions, and justifying all proposed strategies. For each recommendation, the consultant shall describe how it supports and advances the overarching vision of the Plan.

**Task 4.1: Infrastructure**

Incorporating feedback from the project team and PDT, the consultant shall evaluate outcomes from Tasks 2 and 3 and make active transportation network development and prioritization recommendations to achieve the Plan VGOMs. Task shall include one draft iteration for PMT and PDT review, and a second draft for public comment.

**Task 4.2: Programs**

Incorporating feedback from the project team and PDT, the consultant shall evaluate outcomes from Tasks 2 and 3 and recommend a systematic approach for active transportation educational and other non-infrastructure programs to achieve the Plan VGOMs. Task shall include one draft iteration for OCTA and PDT review, and a second draft for public comment.

### **Task 4.3: Policies**

Incorporating feedback from the project team and PDT, the consultant shall evaluate outcomes from Tasks 2 and 3 and recommend systematic approach for active transportation policy to achieve the Plan VGOMs. Task shall include one (1) draft iteration for OCTA and PDT review, and a second draft for public comment.

### **Task 4.4: Funding**

Incorporating feedback from the project team and PDT, the consultant shall evaluate outcomes from Tasks 2 and 3 and recommend systematic approach for active transportation funding to achieve the Plan VGOMs. May include scenario planning to compare approaches or alternatives. Task shall include one draft iteration for OCTA and PDT review, and a second draft for public comment.

### **Optional Task 4.5 Modeling**

In support of the analysis being completed to generate infrastructure, programs, policy, and funding recommendations, both traffic modeling and scenario planning may be needed to compare and evaluate approaches or alternatives. This work shall be coordinated with the OCTA modelling team who will undertake any modeling efforts to address the needs of the project. The consultant shall be responsible for supporting modeling efforts and analyzing results in support of the project.

<b>Task</b>	<b>Deliverable</b>
4.1	<i>Infrastructure recommendations (Administrative draft, public draft, and comment summary)</i>
4.2	<i>Programming recommendations (Administrative draft, public draft, and comment summary)</i>
4.3	<i>Policy recommendations (Administrative draft, public draft, and comment summary)</i>
4.4	<i>Funding recommendations (Administrative draft, public draft, and comment summary)</i>

## **TASK 5: Reporting**

### **Task 5.1: Draft Report**

The final report outline shall be developed by the consultant and provided to the project team for review and comment. The administrative draft report shall be drafted by the consultant team and delivered for review and comment by the PDT. The consultant shall log comments in a response to comment matrix showing how comments are addressed. Based on feedback provided in the administrative draft, the public draft report shall be developed by the consultant team and delivered for review and comment by the general public (e.g., Orange County residents and community organizations). The consultant shall log comments in a response to comment matrix showing how comments are addressed. The consultant shall ensure that the structure and content of the draft and final reports clearly trace how the recommendations presented in the Plan relate to the VGOMs and overall vision. Each section of the report shall include summary statements or visual cues

that reinforce how the data, findings, and strategies support the Plan’s stated goals and objectives.

**Task 5.2 Final Report**

Based on feedback provided in Task 5.1, the final report shall be developed by the consultant team and delivered to OCTA in PDF and Microsoft Word form accompanying the final presentation.

<b>Task</b>	<b>Deliverable</b>
5.1	<i>Draft Report Document (Final report outline, administrative draft and response to comment matrix, public draft and comment, summary of public comments and response to comment matrix)</i>
5.2	<i>Final Report Document and final presentation</i>

**Limitation on Governmental Decisions**

Nothing contained in this scope of work permits the consultant’s personnel to authorize or direct any actions, votes, appoint any person, obligate, or commit OCTA to any course of action or enter into any contractual agreement on behalf of OCTA. In addition, consultant’s personnel shall not provide information, an opinion, or a recommendation for the purpose of affecting a decision without significant intervening substantive review by OCTA personnel, counsel, and management.