



Transportation Committee

Item #17-2-5 Action

January 26, 2017

Award Contract for Bike Share Initial Planning

Issue: Should SACOG award a contract to Toole Design Group for initial planning tasks for a Regional Bike Share System?

Recommendation: That the Transportation Committee recommend that the Board authorize the Interim Chief Executive Officer to award a contract to Toole Design Group for Regional Bike Share System Initial Planning Services for an amount not to exceed \$37,306.

Discussion: Since July 2016, SACOG has been in contract negotiations with Social Bicycles (SoBi) for Regional Bike Share System Operations and Equipment. While SACOG has made considerable progress folding in an innovative bike share business model, which is intended to ultimately result in lower operating costs and a reduced need for public operating dollars, SACOG staff continue to negotiate other points of the contract related to program setup tasks, risk management, and payment processes. SACOG staff's goal is to present a complete and detailed agreement to the Transportation Committee at its March 2, 2017, meeting, but it is hard to attach a fixed timeframe to the negotiations.

Unfortunately, executing a contract with SoBi in March or beyond will likely delay a potential system launch from Fall 2017 to Spring 2018. In an effort to hold open the potential for a launch by Fall 2017, SACOG staff and SoBi staff recommend that SoBi's planning subconsultant, Toole Design Group, begin initial planning work in February and March, in anticipation of executing a complete contract with SoBi by the end of March.

SACOG staff recommends that the "Regional Bike Share System Initial Planning Services" with Toole Design Group include the following tasks for an amount not to exceed \$37,306 (see Attachment A for the complete scope of services):

1. Refine SACOG's Regional Bike Share Program scope of services
2. Develop regional bike share system area and station location planning, evaluation, and expansion criteria
3. Review and adjust the 2013 Bike Share Business Plan's System Area and Station Plan
4. Develop a public input campaign, including a Public Participation Plan

On February 1, 2017, SACOG's Regional Bike Share Project Management Team, which includes representatives from the participating cities, will review Toole Design Group's scope of work, budget, and schedule, and staff will advise the Transportation Committee of any suggested changes.

SACOG’s contract with SoBi for “Regional Bike Share System Operations and Equipment” will include the following remaining planning tasks for Toole Design Group for an amount estimated at \$160,000:

1. Implement a public input campaign
2. Visit preliminary station locations and draft a system area and station plan
3. Draw docking station plans and request permits
4. Acquire permits and final drawings

Background: A bike share system allows the public to rent a bicycle from a docking station and make a one-way trip for a small fare. On December 17, 2013, SACOG awarded \$3.9 million in funding from the 2014 SACOG Flexible Funding Round to the SMAQMD to procure and install a Regional Bike Share project in the cities of Sacramento, West Sacramento and Davis, and on the UC Davis, Sacramento State University, and Sacramento City College campuses.

In April 2015, the Regional Bike Share Project was added to SACOG's Overall Work Program to manage as the lead agency. On February 1, 2016, the Bike Share Policy Steering Committee of elected officials and local agency executive management reviewed findings from SACOG’s bike share consultant, Toole Design Group, and recommended the development of a SACOG owned and operated regional bike share system.

On July 14, 2016, the SACOG Regional Bike Share Policy Steering Committee (PSC) and Project Management Teams (PMT) interviewed the top three bike share operators that submitted proposals: Bewegen, Next Bike, and Social Bicycles (SoBi). Firms who submitted proposals but were not interviewed include Bicycle Transit Systems, CycleHop, and Shift Transit.

Bike Share PSC Members:

Christopher Cabaldon, Mayor of West Sacramento
 Steve Hansen, City of Sacramento Councilmember
 Jeff Harris, City of Sacramento Councilmember
 Lucas Frerichs, City of Davis Councilmember
 Mike McKeever, SACOG Executive Director
 Larry Greene, SMAQMD APCO

Bike Share PMT Staff:

Judy Matsui-Drury, City of Sacramento
 Chris Dougherty, City of West Sacramento
 Jennifer Donofrio, City of Davis
 Jeffrey Damon, Sacramento Regional Transit
 Tim Bustos, University of California, Davis
 Josh Neri, Sacramento State University

As authorized by the SACOG Board, the Bike Share PSC unanimously recommended that the CEO enter contract negotiations with SoBi for Regional Bike Share System Equipment and Operations. SoBi’s proposal includes a “smart bike” fleet of 900 bikes with the ability to expand to 1200 bikes over 5 years and the potential to upgrade to pedal assist e-bikes in the near future. SoBi included Toole Design Group’s bike share system planning services as a subconsultant within their proposal.

SACOG previously contracted directly with Toole Design Group during project development to study bike share governance options and implementation plans. That work has guided the development of Regional Bike Share Public Agency MOU documents and SACOG’s Regional Bike Share Program scope of services.

Approved by:

Kirk Trost
Interim Chief Executive Officer

MM:SS:rh
Attachment

Key Staff: Kirk Trost, Interim Chief Executive Officer, (916) 340-6210
Matt Carpenter, Director of Transportation Services, (916) 340-6276
Sam Shelton, Senior Analyst, (916) 340-6251

EXHIBIT A

SCOPE OF WORK

Toole Design Group's (TDG) role is to provide planning, design, and engineering services for Social Bicycles (SoBi) to obtain permits for approximately 100 bike share station locations in the Sacramento region, including in the cities of Sacramento, West Sacramento, and Davis, and on properties owned by the University of Davis, California State University, Sacramento, and other project partners (referred to herein as "the participating agencies"). The scope of work includes identifying locations for up to 25 auxiliary hub locations utilizing existing public bike racks but it is assumed that detailed site drawings and permits are not required for these locations.

The following is a step-by-step description of our proposed process.

Task 1 – Project Coordination

- Attend a kick-off meeting with SACOG, SoBi, and participating agency staff to discuss project goals, objectives, and the schedule.
- Conduct regular site planning meetings every two-weeks at the beginning of the project and every week as site planning accelerates. Meetings should include the TDG, SoBi, and SACOG Project Managers and pull in staff from each participating agency as appropriate. These meetings will be conducted by phone conference and screen share.
- Provide the SACOG Project Manager with monthly progress reports.

Deliverables

- 1.1 Kick-off meeting and meeting notes (SACOG/TDG contract)
- 1.2 Bi-weekly check-in calls (SACOG/TDG contract)
- 1.3 Monthly progress reports (SACOG/TDG contract)

Task 2 – Understand Permitting Needs and Develop Station Siting Guidelines

- TDG will conduct 1 in-person meetings with SACOG and staff from the participating agencies to understand the permitting process in each agency and to create a set of station siting guidelines that will be used to select and design bike share stations. This task will information inform the schedule for the project and could affect the project budget depending on the complexity of the permitting process in each city.
- TDG will share example station guidelines from other Californian cities and NACTO's recently published Bike Share Station Siting Guide to develop a draft set of guidelines that will be distributed to participating agency staff for review.
- TDG will respond to one set of consolidated comments provided by SACOG to develop final station siting guidelines for each participating agency with the exception of the City of Sacramento.

Deliverables

- 2.1 Permit process meeting notes (SACOG/TDG contract)
- 2.2 Draft and Final Station Siting Guidelines (SACOG/TDG contract)

Task 3 – System Planning

- Collect and review previous planning studies and data from SACOG and the participating agencies including the preliminary station recommendations included in the Sacramento Area *Bike Share Business Plan*, supporting maps, and any other local planning efforts.
- Work with SACOG and the participating cities to understand their system goals and objectives. Cities will be responsible for developing their own goals and objectives. For example, what is their priority for maximizing ridership and revenue, what are the systems equity goals, and are there geo-political considerations that will influence system planning. TDG will aggregate all of this information for a system wide goals and objectives.
- Compare the suggested system and its coverage area and station density to existing U.S. bike share systems of similar size and characteristics. This will include a recommended coverage area and station density.
- Identify order-of-magnitude station sizes for each location to the nearest 5 docks, e.g., 10, 15, 20, etc.
- Develop planning criteria for defining high-priority-zone SLAs.
- Review individual station locations and suggest changes based on where stations may be too closely spaced, miss key destinations, could be better located to capture a particular market, or where social equity or geographic or political considerations may dictate a station.
- Receive PMT feedback and feedback received with key managers, elected officials and stakeholders. The cities will be responsible for conducting and compiling this information.
- Conduct 2 in-person meetings with SACOG and the participating agencies to recommend any changes to the service area and proposed station plan. Proposed station locations will be identified at an intersection level and presented on an interactive map that can be shared to stakeholders and staff. TDG will collect comments on the stations and integrate them into a final station -Final map. Final station locations will be identified in later tasks and may be dictated by site constraints and conditions. However, all final station locations will be identified within a 5-minute walk of the proposed locations.
- Prepare an Initial Service Area and Draft Station Area Map showing the proposed coverage area and general station locations for up to 125 stations.

Deliverables

- 3.1 Fact sheet on system coverage size and station density
- 3.1.3.2 Initial Service Area and Draft Station Area Map (SACOG/TDG contract) (this includes one round of comments)
- 3.2.3.3 Memorandum documenting site planning methodology and revisions (SACOG/TDG contract) (this includes one round of comments)

Task 4 – Site Identification

- TDG will use a combination of desktop analysis (i.e., aerial photos and street view) and our knowledge of the area to identify at least two possible sites for each location shown

on the Final Service Area Map. This will result in a list of at least 250 sites that will be logged in a database and presented on a Preliminary Station Map.

- Sites will be identified in the public right-of-way wherever possible, first prioritizing sidewalk sites, however, there may be some locations where the TDG team recommend that SACOG, the City, or SoBi approach a different city department (e.g., parks department), another government agency (e.g., the State Capital precinct), or a private land owner about hosting a station (e.g., local developers).
- TDG will conduct 2 workshops with SACOG, SoBi, and participating agency staff to review each site on the Preliminary Station Map and:
 - Identify which sites to take forward for further analysis.
 - Rank sites, where there are multiple sites in consideration.
 - Identify alternative sites where none of the identified sites are approved.
 - If an agency requires additional workshops, TDG staff will make all the workshop materials available to staff for use in the meeting.
- TDG will prepare a Draft Station Map based on the results of the workshop to take forward to public and stakeholder engagement.

Deliverables

- 4.1 Preliminary Station Map (SACOG/TDG contract)
- 4.2 Draft Station Map (SACOG/TDG contract)

Task 5 – Public Engagement

- Work with SACOG and SoBi to provide input on develop the Public Input Campaign (PIC) related to refining the station map.

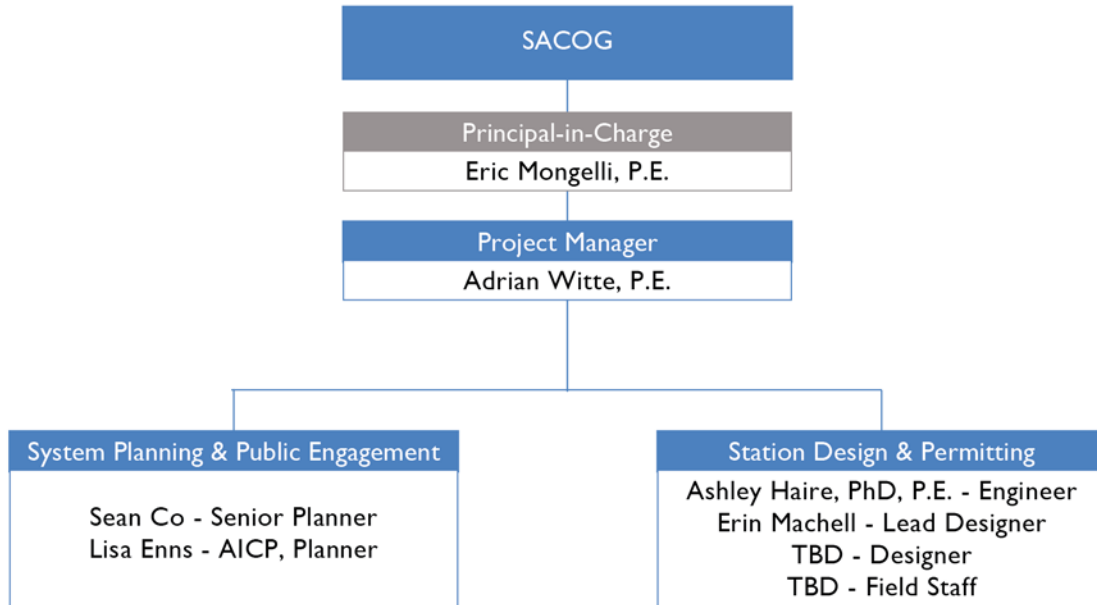
Deliverables

- 5.1** Input on the station planning tasks of the Public Input Campaign (SACOG/TDG contract)

SCHEDULE

			Work task			
			Deliverable			
			Meeting			
Task			M1	M2	M3	M4
1. PROJECT COORDINATION						
1.1	Kick-off meeting					
1.2	Check-in calls					
1.3	Monthly progress reports					
2. UNDERSTAND PERMITTING NEEDS & DEVELOP STATION SITING GUIDELINES						
2.1	Permit process meetings and notes					
2.2(a)	Draft Station Siting Guidelines					
2.2(b)	Final Station Siting Guidelines					
3. SYSTEM PLANNING						
3.1	Initial Service Area and Draft Station Map					
3.2	Final Memorandum (site planning methodology and revisions)					
4. Site Identification						
4.1	Preliminary Station Map					
4.2	Draft Station Map					
5. Public Engagement						
5.1	Input on the station planning tasks of the Public Input Campaign					

TEAM STRUCTURE



Toole Design Group Budget for SACOG/TDG Contract

	SACOG / TDG Contract
Task 1: Project Coordination	\$11,965
Task 2: Understand Permitting Needs and Develop Station Guidelines	\$5,778
Task 3: System Planning	\$10,368
Task 4: Site Identification	\$7,760
Task 5: Public Engagement	\$1,435
TOTAL	\$37,306

The total amount to be paid to Contractor under the Agreement with SACOG shall not exceed Thirty-Seven Thousand Three Hundred and Six Dollars (\$37,306), unless expressly authorized in writing by the SACOG Chief Executive Officer.