

EXHIBIT “A”

Scope of Work

The Arup team scope includes tasks organized by the following Key Topic Areas:

1. Transit Service
2. Interagency Collaboration
3. User Experience
4. Travelers
5. Land Use
6. Emerging Mobility

Our proposed task structure is as follows:

Task 1: Stakeholder Engagement

Task 2: Background Conditions

Task 3: Strategy Development

1. Goals and Evaluation Metrics
2. Strategy Identification by Topic
3. Evaluate Strategies and Develop Key Recommendations
4. Final Plan

Task 4: Grant Administration and Project Management

The detailed task descriptions, example strategies, and deliverables are described below.

All parties acknowledge the deliverable dates are aggressive and will be adjusted if the funding agency (Caltrans) provides authorization of an extension.

1. Stakeholder Engagement

Task Lead: Arup

1.1 Facilitate Advisory Committees – Arup/NWC/Steer

Arup will prepare for, attend and/or facilitate up to six stakeholder meetings for the project. Because of the condensed schedule Arup anticipates three PAC and TAC meetings each through the project duration. The meetings will focus on project updates, task findings, and reviewing the project team’s recommendations. NWC Partners, Inc. (Subconsultant) and Steer (Subconsultant) will also attend a limited amount of meetings pertaining to tasks they are leading. These six meetings will be spread across the following categories.

- **Policy Advisory Committee (PAC):** Business, economic, and policy leaders.
- **Technical Advisory Committee (TAC):** Transit service providers and technical experts.

Members of the PAC and TAC will be identified by SACOG staff with input from the Arup team. SACOG staff will take the lead on organizing, facilitating and soliciting feedback from the

TAC, with participation from Arup as requested. The PAC meetings will be concentrated in the second half of the project (Task 3).

At the outset of the project, Arup will prepare a schedule of TAC and PAC meetings with high-level agendas for each meeting that correspond to key milestones. This schedule will be submitted to SACOG staff for review and approval. Content for each of the three PAC meetings, including agendas, memos and slide decks, will be prepared in advance for SACOG staff review. SACOG staff will take the lead on all meeting logistics, including scheduling, materials distribution, and virtual or in-person meeting spaces.

Arup understands the importance of engaging the SACOG Board and relevant committees throughout the project lifecycle. Arup will consult with SACOG staff to determine if any of Arup's designated six meetings will be Board or relevant committee meetings. If selected, Arup will prepare slide decks for the designated Board and/or committee meetings. Arup will be available to virtually attend and present and answer questions at the designated meetings.

All parties acknowledge that if an extension is granted, Arup will prepare for, attend and/or facilitate one additional stakeholder meeting (for a total of seven meetings).

1.2 Support SACOG staff with materials for other meetings

Arup will provide support for additional meetings beyond the six identified. This may include updates to previously created slide decks or updates to other meeting materials for use by SACOG staff. The Arup team will not attend or participate in these additional meetings. We will review meeting notes and summaries prepared by SACOG staff and incorporate the feedback received into our work products.

A contingency to the budget is included and may be used to allow Arup's participation in additional TAC, PAC and/or SACOG meetings, to conduct grassroots community engagement, or any other purpose with advance written approval from SACOG.

Task 1 Deliverables – To be completed by February 28, 2021:

- PAC and TAC meeting schedule
- Facilitate and/or prepare for up to six meetings (TAC, PAC, SACOG Board, and/or SACOG Committee meetings)
- Support for additional meetings

2. Background Conditions

Task Lead: Arup

2.1 Review and summarize existing reports and data

The Arup team will review historic, existing and anticipated future conditions organized by the

Key Topic Areas. This will include any available COVID-related data and plans from the SACOG region as well as agencies in similar markets that have already adopted recovery plans. Arup will rely primarily on information provided by SACOG staff, supplemented by independent research as resources allow. The findings of this task will be summarized in a Background and Existing Conditions memo. Information to be assembled is summarized below for each Topic Area. Arup will submit a draft memo to SACOG for review, and will make one round of revisions upon receipt of a single set of consolidated, internally-consistent comments.

2.1.1 Transit Service - Arup

Based on available information collected by SACOG, summarize existing (pre and post-COVID) service levels and route structures. Identify significant changes in service that are planned, including planned extensions of light rail and anticipated changes to regional rail services (Capital Corridor and San Joaquin). Sources: SACOG MTP and other regional documentation/data, transit agency reports and plans, information provided to SACOG by agencies through the TAC process.

2.1.2 Interagency Collaboration – Arup/NWC

Based on available information from SACOG, summarize existing and planned collaboration efforts, such as interagency fare media, schedule coordination, and procurement. Evaluate factors contributing to successful collaborations to date. Assess current multi-county, multi-agency funding strategies. Sources: Research/data provided by SACOG; additional independent research as resources allow.

2.1.3 User Experience - Steer

Based on available information from SACOG, describe key components of the rider experience, focusing on ease of use of the systems and public information provided to riders. Complement SACOG staff efforts to gather best practices/case studies on fare integration, traveler information tools, procurement, cobranding, operational efficiencies, particularly during COVID or other recessions/downturns. Sources: Research provided by SACOG; additional independent research as resources allow.

2.1.4 Travelers - Arup

Review available information from SACOG to identify key characteristics of existing transit users in the region; as well as potential markets for new riders. We will review available passenger surveys, historic and forecast ridership information, including trip origins and destinations if readily available. Demographic information will be assembled from SACOG datasets and other publicly available sources (Census and/or ACS) as resources allow.

2.1.5 Land Use - Arup

Summarize existing and projected land use patterns. Where possible with available data and resources, we will also document historic transit ridership as a function of land use. Source: SACOG MTP/SCS and travel demand forecasting data.

2.1.6 Emerging Mobility - Steer

Summarize examples of emerging mobility applications within the study area based on existing readily available information (VIA on-demand shuttle pilot programs, micro-mobility partnerships, private mobility service availability). Summarize major national trends in emerging mobility use, with a focus on public transit partnerships and first/last mile solutions. Sources: Information from SACOG, supplemented with independent research by the consultant team.

Task 2 Deliverables – To be completed by November 30, 2020:

- Draft/Final Background and Existing Conditions Memo.
Arup will make one round of edits upon receipt of consolidated, internally-consistent comments.

3. Strategy Development and Evaluation

Task Lead: Arup

In Task 3 the Arup team will identify, evaluate and prioritize strategies to achieve a more integrated, resilient, and effective regional transit network.

- In Task 3.1, we will identify near- and long-term goals for the regional transit network, as well as associated evaluation criteria.
- In Task 3.2, we will identify a ‘long list’ of potential strategies to reach these goals, organized by each key topic. This will result in a list of strategies and, depending on the Key Topic Area, other draft work products (such as the land use/service typologies described in Task 3.2.5. It is important to note that there is overlap and synergy between most of the Key Topic Areas; hence we anticipate that the strategies themselves will also span multiple topic areas.
- In Task 3.3, we will hone the long list of strategies into a toolkit of recommendations based on available feedback from the TAC and PAC that is received in accordance with the project timeline . Arup will also assess potential strategies against the evaluation criteria adopted in Task 2.
- Finally, in Task 3.4, the Arup team will deliver final recommendations and next steps from this comprehensive strategy development process.

3.1 Goals and Evaluation Criteria

The MTP/SCS established broad goals related to people, places and travel. This project will build on these efforts by identifying specific goals for the region’s transit network that align/implement with the goals of the MTP/SCS, and the Key Topic Areas. We will solicit input from the TAC, PAC, and SACOG staff and leadership to the extent possible within the project timeline, to propose and refine a series of goals and related evaluation criteria. The criteria will then be used to evaluate and prioritize the transit and mobility strategies identified in Task 3.2.

Task 3.1 Deliverables – To be completed by December 18, 2020:

- Draft/Final Goals and Evaluation Criteria Memo.
Arup will make one round of edits upon receipt of consolidated, internally-consistent comments.

3.2 Strategy Identification by Topic

The Arup team will identify strategies organized by the Key Topic Areas. Information to be assembled to identify strategies is summarized below for each Topic Area.

3.2.1 Transit Service - Arup

- The Arup team will develop 6-8 service typologies incorporating fixed route, on-demand, microtransit, and shared mobility services.
- Based on analysis performed in other tasks, use professional judgement to identify corridors where fixed route transit should be prioritized for service retention/improvement in the near term.
- Identify strategies to retain, restore, and improve these fixed route service corridors.
- Define service goals for fixed route corridors, including safety, reliability, availability (includes frequency, span of service and station/stop proximity), and speed.
- Identify strategies to improve access to existing and planned light rail and regional rail services.
- Recommend strategies for microtransit, micromobility and other alternatives to complement or replace fixed-route service in the near term and long term.

3.2.2 Interagency Collaboration – Arup/NWC

- Identify opportunities to increase collaboration among transit providers in the region, both formally and informally, in response to the COVID crisis and over the longer term. These may include:
 - Creative regionwide and multi-county funding approaches and strategies
 - Shared procurement/outsourcing – among transit agencies, and/or how SACOG could play a role in procurement and outsourcing for the region as a whole to leverage economies of scale
 - Increased coordination of schedules, payment options, branding and marketing
 - Build on successful models of joint service provision, eg. Causeway Connector and airport service
 - Build on successful models of intercounty and interjurisdictional collaboration, including solutions for rural operators eg. Yuba-Sutter
- Identify most likely and promising new funding opportunities including COVID-related stimulus and funding opportunities

3.2.3 User Experience - Steer

- Identify promising strategies that build on the efforts of SACOG staff and consultants related to fare payment/Connect Card and other traveler information tools.
- Identify other strategies to improve user experience including schedule and fare

integration, co-branding, universal accessibility strategies, stop/station amenities, passenger information and feedback mechanisms.

3.2.4 Travelers – Arup

Identify target markets, including disadvantaged communities, essential workers and other transit-dependent populations. Based on analysis conducted in Task 2.1, we will identify criteria for target markets with SACOG’s input. Target markets will be identified for both near (COVID-recovery) and long-term conditions. Consider social equity and target the core riders that rely on transit, and identify populations that have critical unmet transportation needs, as well as those where public transit could provide a reasonably competitive alternative to driving.

- Assess working from home opportunities and constraints. For near-term recovery, assess which employment sectors are likely to remain working from home, and which are likely to return to workplaces, and factor that into target markets. Focus on the many essential, service-oriented, and blue-collar jobs – key groups especially highlighted due to the pandemic - and factor their travel behaviors into opportunities.

3.2.5 Land Use - Arup

- Define service and land use typologies. Land use will include at least two rural/exurban typologies and will reflect both existing urban nodes and job centers (e.g. downtown Sacramento) and emerging urban nodes and job centers (e.g. West Sacramento, Roseville).
- Identify most appropriate service typologies for each land use typology. Using these typologies, the Arup team will identify corresponding land use and demographic profiles (density, mix of uses, transit-dependent populations, proximity to major job centers) suited to each typology. The team will determine SACOG-specific examples of a geographic area (neighborhood, town, or rural area) for each typography.

3.2.6 Emerging Mobility - Steer

- Explore the feasibility and benefits of transit agency partnerships with micro-mobility providers in areas where it could replace or increase access to fixed-route transit.
- Explore the feasibility and benefits of expanding microtransit partnerships into other parts of the SACOG region.
- Examine the long-term impact of autonomous transit vehicles on service operations.

Task 3.2 Deliverables - To be completed by December 18, 2020:

- Draft/Final Strategy long list. Vision, goals, and Key Topic Areas relevant to each strategy will be marked.
 - Includes draft land use and service typologiesArup will make one round of edits upon receipt of consolidated, internally-consistent comments.

3.3 Evaluate Strategies and Develop Key Recommendations – Arup/NWC/Steer

The Arup team will engage in a multi-step process to refine the long list of potential strategies into a toolkit of prioritized strategies for consideration.

The Arup team will engage the technical and policy advisory committees to provide feedback and input on the most promising strategies to the extent possible within the project timeline.

The selection of key strategies will also be informed by a qualitative evaluation of each strategy's performance against a set of evaluation metrics identified in Task 3.1.

Strategies that are shown to have a higher impact across multiple indicators will then be evaluated for feasibility and plotted in an impact/feasibility matrix, as illustrated below. The results of this analysis will then be shared with SACOG staff to settle on a final set of strategies that form the basis of our toolkit of prioritized strategies.

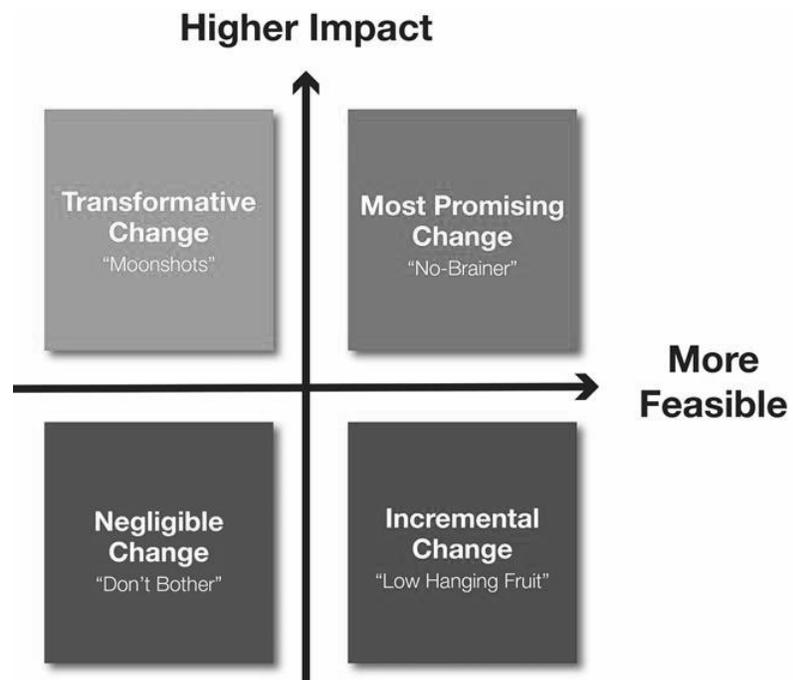


FIGURE 1: EXAMPLE IMPACT/FEASIBILITY MATRIX

3.4 Final Report

The Final Report will summarize the tasks and strategy evaluation in a set of recommendations and next steps. It will include graphics and illustrations of key concepts (e.g. street section before/after BRT improvements).

Arup will lead production of the report. NWC and Steer will lead the pieces identified in Tasks 2 and 3 (NWC: Interagency Collaboration; Steer: User Experience and Emerging Mobility).

The Final Report will include:

- An executive summary, including key findings from Task 2 Background Conditions.
- A toolkit of prioritized strategies to consider for the near-term (18 months to five years)

and long-term (15-20 years).

- Documentation of the planning, outreach, and strategy development process
- Documentation of the technical analyses
- Next steps: SACOG’s roadmap for the next twenty years. The Toolkit answers the “what” and the next steps answers the “how.” Next steps will be divided into two components: a short-term set of steps for the next 18 months to 5 years (including pandemic-related recommendations and actions to ensure broad-based community buy in) and a long-term set of steps for the next 15-20 years. As part of this, the Arup team will consider steps for SACOG to identify benchmarks and ways to incentivize progress for interagency collaboration.

Arup will submit a draft Final Report to SACOG and will make two rounds of edits upon receipt of consolidated, internally-consistent comments.

Task 3.4 Deliverables - To be completed by February 28, 2021:

- Draft/Final Report
Arup will make two rounds of edits upon receipt of consolidated, internally-consistent comments.

4. Project Management and Grant Administration

Task Lead: Arup

4.1 Invoicing

The Arup team will submit monthly invoices that track all grant expenditures for all team members to SACOG. This will support the invoice package submissions to Caltrans staff.

4.2 Support quarterly overall work program (OWP) reports

The Arup team will support SACOG staff in submitting quarterly reports to Caltrans and Division of Rail and Mass Transportation staff by providing a summary of project progress and grant/local match expenditures

4.3 Final request for funding/grant closeout

The Arup Team will submit a final invoice to SACOG staff after acceptance of the final deliverables.

4.4 Project management

The Arup team will manage the project to ensure that the budget and schedule is maintained to the maximum extent possible. The Arup Project Manager will coordinate weekly project status meetings with SACOG co-leads. The minutes from these meetings shall serve as a record of decisions. Minutes will be emailed to SACOG staff within 24 hours of the meeting, and SACOG staff will have one week to make any corrections.

Task 4 Deliverables - To be completed by February 28, 2021:

- Monthly invoices
- Meeting minutes from weekly check-ins