2018 Vermont Public Transit Policy Plan

The Vermont Agency of Transportation (VTrans) is requesting the services of a qualified planning firm to develop a statewide Public Transit Policy Plan (PTPP). The PTPP will provide policy level direction, guidance, and performance tracking to inform and guide future transit investments.

The Vermont Public Transit Policy Plan will quanitify Vermont’s transit needs, as well as recommend programmatic and policy initiatives to strengthen the statewide transit system.

Project Summary

# Introduction

The development of a PTPP every five years is required by Statute (<http://legislature.vermont.gov/statutes/section/24/126/05089> Title 24, VSA, §5089). The first PTPP was published in 2000 and the most recent version was published in 2012. This Plan will be an update to the 2012 PTPP and will serve as a guide for the Vermont Agency of Transportation (VTrans) and its partners in making decisions on implementing and funding transit projects that facilitate mobility for Vermonters, minimize duplication of services, leverage limited funds, maximize ridership, and improve coordination of services. The PTPP part of a series of modal policy plans, which together, provide direction for various VTrans’ programs and provide the foundation of the Vermont Long Range Transportation Plan. In addition, the PTPP will meet the objective of the 2014 Human Service Transportation Coordination Plan, including developing an annual workplan for the Elderly and Disabled (E&D) Transportation Program.

# Purpose

Public transit needs transcend jurisdictional boundaries and transportation system ownership. This plan, while focused on a State perspective, recognizes the need for an integrated public transportation system. Public transportation, related to this plan, refers to passenger service transportation “by all means available to the general public” while public transit service is a subset of that which means “…any fixed route, paratransit, transportation brokerage, user-side subsidy, and or rideshare/ride-match program which is available to any person upon payment of the proper fare, and which is promoted to be available to all members of the public, including those with special needs.” (24 V.S.A. §5088 (5))

While this PTPP is primarily focused on Public Transit services and coordination with the 2014 Human Service Transportation Coordination Plan, the update shall be developed in conformance with the 2018 Long Range Transportation Plan. Equally important, the plan is concerned with the statutory requirement of conformance with Chapter 117 (municipal and regional planning and development). Regional plans, together with the PTPP, shall function to coordinate the provision of public, private nonprofit, and private for-profit regional public transit services, in order to ensure effective local, regional, and statewide delivery of services. (24 V.S.A. §5089)

# Use

The plan is intended to serve as a guide for accommodating public transportation in the development of State and local transportation systems. While the PTPP is updated every five years, it serves as the primary guidance for continued development of public transit in the State over the next ten years. The plan is to be consistent with Federal and State laws and regulations. The plan will: provide a summary of state and federal regulations, policy framework, and planning requirements unique to transit; provide a current profile of the system; identify current needs; establish recommendations; create a performance framework that will guide future investment decisions and Agency practices; and develop and implementation plan, inclusive of an Elderly and Disabled Program Workplan, that will identify both short and long term strategies and action items to fulfill proposed recommendations.

Scope of Work

# Background

Vermont’s existing public transit services attempt to balance and satisfy a variety of needs at the state, regional, and local level; ranging from basic mobility needs of the general and special-needs public to providing access to employment centers and intercity travel options. Enhanced intermodal connections and coordination with intercity bus service, ride sharing programs, passenger rail, and commercial aviation are all considered crucial elements of a successful, integrated public transportation system.

The vision for Public transit in vermont:

*public transit meets the basic mobility needs of all vermonters including transit-dependent persons, provides access to employment and other modes, mitigates confestion, preserces air quality and promoyes efficient energy use, and advances the State’s economic developmetn objectives, all in a safe, reliable, cost-EFFECTIVE, And environmentally responsible manner.*

Vermont is a predominately-rural state with a few urbanized centers. This rural nature and low population densities provide a major challenge to public transit delivery. Many of the rural transit providers in Vermont have evolved from local human service providers or a local urban area need. Vermont’s current public transit system consists of eight distinct public transit entities. Service in each of the provider areas includes the spectrum of transit options from fixed-route style transit, demand response transit by bus, van and volunteers, to intercity connectivity by commercial intercity carriers. Demand response services are coordinated with many human service programs, including: Medicaid, other AHS programs which transport children and those training for employment, Agencies on Aging and other programs serving the elderly, programs serving those with disabilities, and commuter programs. In addition, VTrans has established and delivers supplemental demand response programs such as the Elderly and Disabled Persons Transportation Program, and ADA Paratransit service.

Public transportation and public transit policy for Vermont is contained in Title 24 V.S.A. Chapter 126 and [19 V.S.A. § 10f.](http://legislature.vermont.gov/statutes/section/19/001/00010f)  The intent of this planning effort is outlined in 24 V.S.A. § 5089(a) <http://legislature.vermont.gov/statutes/section/24/126/05089>.

# Major Tasks

## Existing Conditions Assessment

The consultant will compile a summary of existing conditions that will describe and quantify how transit services are developed, managed, delivered and funded in Vermont. The consultant will utilize existing plans, statistics regarding transit agency performance and productivity, as well as input collected from transit agency leadership, members of the public, and other transit system stakeholders. This assessment shall include a graphically rich summary of relevant historical trends (i.e. ridership, funding, etc.). The assessment will establish a baseline from which to evaluate future conditions and develop recommendations and will include the following sub-tasks:

* Identify Best Practices: Conduct an assessment of Statewide Public Transit Plans from up to four other states and summarize key information and findings. Identified states should be innovative in practice and similar in terms of demographics and development patterns to Vermont. This review shall examine the way such programs are structured and organized as well as how they raise and distribute revenues. The purpose is to demonstrate how successful processes have been executed in other states and regions, which strategies and approaches have helped sustain momentum and innovation, and areas or key issues where states have faced challenges.
* Review Background Information: Compile and summarize review of relevant regulatory and planning documents and programs related to Public Transit and modal planning, including the following:
  + Relevant Federal and State Planning Regulations
  + VTrans Project Selection and Prioritization Processes (VPSP2)
  + Current modal plans
  + Previous Public Transit Policy Plan (2012)
  + VTrans Long Range Transportation Plan- draft (2018)
  + VTrans Strategic Plan (ongoing)
  + Vermont Human Service Transportation Coordination Plan (2014)
  + Vermont Public Transit Route Performance Reviews
  + Vermont Statewide Intercity Bus Study (2013)
  + Various Transit Operator Plans (i.e. Transit Development Plans, Short-Range Transit Plans, and/or Strategic Plans as applicable)
  + Transit Network Overview: Provide a system overview of the current public transit network including the transit operators, the services they provide and an inventory of their infrastructure, operational conditions, ridership, current management systems, connectivity with other modes, a summary of capital and maintenance/operating costs, revenue levels, and funding sources.
  + Transit Program Overview: Provide an overview of the VTrans Public Transit Section and the legal framework under which it operates, inclusive of federal programs that fund and guide transit in Vermont and state statutes that direct the program.
  + Transit Partners Overview: Describe the role of the various public transit operators’ partners including VTrans, the Agency of Human Services, the public transit service providers and private providers, advocacy and advisory organizations, and those entities providing funding for the operation and investment in the system.
  + Other: Other relevant components to examine include, but are not limited to, transit market and trends affecting demand such as economic trends (i.e. key industries and employment sectors), population growth/decline, other demographic trends such as relevant health statistics, land use patterns, income and housing, trends in technology, cost of mobility, disruptive transit resources, etc.

## Needs Assessment

Understanding public transit needs in such a rural state is an important part of planning for the future of public transit in Vermont. Based on an understanding of existing conditions and future trends through data collection and input from the PTPP Internal Working Group (IWG), Project Advisory Committee (PAC), and stakeholders, the consultant will complete a statewide public transit needs assessment.

The needs assessment is based on the best information available today. However, the tranSit industry is constantly evolving, and the PTPP must be flexible enough to accommodate a variety of outcomes. This assessment does not represent a future investment vision for public transit itself, but will inform the development of investment scenarios as part of the plan.

The needs assessment shall capture the transit service gaps and needs as well as funding and financial outlook- inclusive of revenue projections. The analysis is not intended to propose or define a particular level of transit service, but rather to illuminate the gap between needs and the anticipated resources available to providers around the state. The consultant will identify an order of magnitude investment requirements and potential resource gaps both financial and technical, which will inform implementation strategies - specific actions taken to enact policies in the plan.

This analysis will compare expected future funding needs with distribution formulas, success at the local level in raising revenue, and partnership potential to gauge the amount of resources the statewide network need. Understanding future needs will enable VTrans to develop a forward set of actions and investments by agencies and leaders throughout the state that will support the growth and development of public transit. This will also take into account some of the reductions in trips taken in recent years.

The assessment will include the following sub-tasks:

* Develop methodology: Develop a methodology for assessing public transit needs on a statewide, regional and local basis- for both capital and operational costs. Present the methodology to the Project Managers for review and approval.
* Complete Transit System Needs Assessment: Apply methodology to produce a high-level assessment of both the annual capital and operations dollars needed by public transit providers statewide under three different future service scenarios based on the existing public transit services and projected future demand.
* Complete Financial Needs Analysis: Develop a financial analysis that will provide an overview of the amount, timing, and type/source of funding in Vermont by mode as well as how it is distributed. This analysis will compare expected future funding needs with distribution formulas, success at the local level in raising revenue, and partnership potential to gauge the amount of resources the statewide network need.

## Additional Needs and Opportunities

In addition to those service and capital investment needs identified in the needs assessment, the Consultant shall also facilitate the identification of needs and opportunities that have the potential to strengthen and improve transit service and programs in Vermont. These opportunities shall be identified through a variety of resources, including input from key VTrans staff, interviews and meeting with key stakeholders, as well as through the analysis of individual transit agency operations and research on transit funding. Proposed initiatives shall be vetted and refined through the IWG. At a minimum, each initiative shall identify why it is a major area of concern and/or why it offers an opportunity to improve the delivery of transit services in Vermont and recommendations on how the needs might be addressed.

The agency shall maintain a working LIST for both short- and long-term planning needs, goals, and objectives that balance the needs for regional service with the needs for local service.

## Recommendations and Implementation

The purpose of the PTPP is to define the goals, policies, and implementation metrics for public transit in Vermont. Being able to measure and communicate the value and benefits derived from the investment in public transit is essential to being able to attract and sustain funds and partnerships. Based on the assessment of existing system and review of major issues, the Consultant will complete the following subtasks:

* + Policies: Develop proposed policy revisions to guide VTrans and its partners to the desired future scenario. These policies will be reviewed and approved by the IWG and PAC.
  + Performance Measurement System: Develop a *Performance Framework* for making future *Investment Decisions* concerning the system:
    - Define Desired Outcome Categories & Performance Goals.
    - Develop Performance Measures and standards.
    - Develop Performance Targets (given available Resources).
    - Depict Future System Performance given different levels of Investments *(What if Scenarios….).*
  + Goals, Objectives, and Actions: Propose revised goals, objectives and actions.
  + Implementation Plan: Develop an implementation plan to fulfill the policies, goals, and objectives. This plan will be utilized by Transit Program staff and the Public Transit Advisory Council as an annual work plan and long-term guidance document. As such, it should include action items related to relevant transit programs such as the incorporating the Elderly and Disabled Persons Transportation Program. This plan should, at a minimum:
    - Propose specific actions that need to be implemented.
    - For each proposed action, identify responsible parties (agency staff and sections) that need to be involved.
    - Propose a timeframe for the implementation of these actions.
    - Identify issues and topics that should be addressed within the near (1-2 years) and long term (3, 5, and 10 years).
    - Develop recommendations to monitor the performance of the system.

# Plan Preparation Process

The project will be managed by VTrans staff comprised of a VTrans Planning Coordinator and the VTrans Public Transit Program Manager. The project managers shall be responsible for all administrative aspects of the project, ensure the delivery of the project outputs and the attainment of project outcomes, and shall make available or assist in providing the consultant Agency documents and other information for the preparation of the PTPP. The consultant should anticipate regular project status/management meetings with project managers, by telephone or in person to monitor the progress of the project and identify and resolve problems and issues as they arise.

An IWG comprised of additional representatives from VTrans, the Department of Labor (DOL), Agency of Human Services (AHS), the Agency of Commerce and Community Development (ACCD), and other key stakeholders shall serve as the project’s steering committee to provide review, input, and feedback on the contents of the plan as it is developed. The consultant should anticipate at least four (4) meetings with the IWG.

VTrans is committed to public involvement in all its planning activities and will utilize the Transportation Planning Initiative (TPI) to support that work (see 24 V.S.A. § 5089 and the TPI Guidance Manual) as well as other methods. The consultant shall follow the process outlined in the VTrans Modal Planning Public Outreach Process guidance document. Based on this guidance document, the consultant shall anticipate making at least two (2) presentations to the Public Transit Advisory Committee (PTAC) and to the Regional Planning Commissions (RPCs) during regularly scheduled PTAC and TPI meetings (these can be combined) and two (2) presentations to the VTrans Executive Staff, to keep these groups informed of the status of the plan and to solicit their input.

The consultant shall confer with and conduct individual meeting or focus group sessions as necessary with individual transit operators, agency personnel, other state and federal agencies, and appropriate national, statewide, and regional organizations such as the RPCs/MPO, as necessary during the development of the plan.

A robust public engagement plan with activities that educate and involve the public and key stakeholders in public transit planning is critical for the PTPP. The IWG shall determine key organizations that the Consultant shall coordinate public meetings with for the purpose of engagement. In addition, the Consultant shall facilitate innovative outreach activities (i.e.wiki map, interactive budget simulators, interactive polling, intercept surveys, etc.) for focused input.

The consultant, in consultation with the Project Managers, shall be responsible for coordinating and conducting all public and committee meetings. This will include scheduling, location and agenda work as well as appropriate notification of desired attendees, the public and other interested parties. The consultant will facilitate the meetings, take notes, compile them, and circulate for review within five business days of the meeting. Any interim reports, drafts, technical memos, presentations, or other materials developed for the meetings will be submitted to the project managers for review prior to the meetings. If it is determined by VTrans that an issue or topic has been adequately addressed in another document, that topic shall be referenced, and link provide in the PTPP.

# Project Schedule

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| **Task Name** | **Description** | **Deliverables** | **Schedule** |
| 0) Regular Project Status meetings | -Consultant shall regularly participate in project status/management meetings with PMs, by telephone or in person, to monitor the progress of the project and identify and resolve problems and issues as they arise. | -Facilitate meetings and present relevant prepared materials | Monthly check-ins via conference call for project duration |
| 1) Project Kick-off meeting | -Consultant team meets with Project Managers (PMs) to review project activities, outcomes, and timelines- inclusive of the required public engagement elements and additional engagement strategies.  -Consultant to update project workplan and to develop an innovative PTPP Engagement Plan based on this meeting and best practices. The PTPP Engagement Plan will be implemented throughout this project. | -Facilitate 1 meeting  -Project work plan delivered to PMs (electronic copy)  -Project public engagement plan delivered to PMs (electronic copy) | Winter 2018 |
| 2) Committee meetings: Project Overview | - Present project overview, work plan and public engagement plan to IWG. Solicit input  - Present project overview, work plan and public engagement plan to VTrans Executive Staff. Solicit input | -Prepare and provide materials (i.e. PowerPoint presentation, hard copies of relevant reports, maps, and/or illustrations) and facilitate 2 meetings  -Revise project documents based on input from IWG and Executive Staff and deliver to PMs (electronic copy) | Spring 2018 |
| 3) Analysis of Existing Conditions | -Compile/create information on existing conditions.  -Develop Existing Conditions Technical Memoranda. | -Technical Memoranda delivered to PMs (electronic copy) | Summer 2018 |
| 4) Committee meeting: Existing Conditions | Meet with IWG to review findings | -Facilitate meetings and present relevant prepared materials | Summer 2018 |
| 5) Needs Assessment | -Complete transit system and program needs assessment.  -Develop Needs Assessment Technical Memoranda. | -Technical Memoranda delivered to PMs (electronic copy) | Fall 2018 |
| 6) Committee meetings: Needs Assessment | Meet with IWG and PAC/TPI, and present results. | -Facilitate 2 meetings with the IWG and the PAC/ TPI (combined)  -Prepare and provide materials (i.e. PowerPoint presentation, hard copies of relevant reports, maps, and/or illustrations)  -Revise project documents based on input and deliver to PMs (electronic copy | Fall 2018 |
| 7) Implementation Plan | Develop implementation plan. | -Technical Memoranda delivered to PMs (electronic copy)  -Revise plan based on PM input. | Winter 2018/2019 |
| 8) Committee meeting: Implementation Plan | Meet with IWG to review implementation plan. | -Facilitate meeting  -Prepare and provide materials (i.e. PowerPoint presentation, hard copies of relevant reports, maps, and/or illustrations)  -Revise project documents based on input and deliver to PMs (electronic copy | Winter 2018/2019 |
| 9) Prepare Final Plan | Complete Plan. | -Graphically rich narrative report inclusive of a one-page snapshot/ summary, Executive Summary, Plan Narrative, and Appendices delivered to PMs (Electronic PDF and copy in original program. All maps shall be drawn in Vermont State Plane.  All GIS data and maps created for the plan shall be submitted as part of the deliverables).  -Revise plan based on PM input. | Spring 2019 |
| 10) Committee Meetings: Final Plan | Meet with, IWG, PAC/TPI and Executive Staff. | -Facilitate 3 meetings with the IWG and the PAC/TPI (combined), and Executive Staff | Spring 2019 |

# Final Products and Deliverables

The final product will meet all requirements of the Public Transit Policy Plan as stated in law and the Human Service Transportation Coordination Plan.

All products will be submitted in an appropriate quantity and format in a timely manner in accordance with the project schedule. All submissions to the IWG and PAC for review will be in both hardcopy and electronic format, and will be provided at least one week prior to any scheduled presentation or discussion.

Final products will include a graphically rich Final Report, a concise Executive Summary, and Technical Appendix inclusive of all technical memorandums, public engagement records, etc. All maps shall be drawn in Vermont State Plane.  All GIS data and maps created for the plan shall be submitted as part of the deliverables. In addition, a stand-alone Implementation Plan shall be developed that will, at minimum, identify:

* Revised goals, objectives, and policies
* Actions and Strategies to achieve stated performance goals and standards
* Specific actions that can be implemented in the short term (1-2 years) and the long term (3, 5, and 10-year timeframe);
* For each proposed action, identify responsible parties (Agency staff, partner organizations, etc.);
* Propose a timeframe for the implementation of these actions;
* A long-term plan to monitor the performance of the system
* A workplan specific to the Elderly & Disabled Program

The consultant shall deliver to VTrans 10 bound copies of the final report and Executive Summary, as well as electronic copies, with the final report available in both Adobe format and the original program format (i.e. Microsoft Word, Adobe InDesign, etc.).