

Strategic Review of Transit in the Fraser Valley

Terms of Reference

July 2008

DRAFT



Table of Contents

1.0 Background	3
2.0 Purpose.....	3
3.0 Scope of Work	4
3.1 Foundation Paper	4
3.1.1 Transit Market Analysis.....	4
3.2 Transit Vision (Regional Level)	5
3.3 Transit Vision (Municipal)	6
3.4 Transit Concept Plan.....	6
3.5 Final Report	7
3.6 Communications/Consultation Plan.....	7
4.0 Key Deliverables.....	8
4.1 Technical Committee Responsibility	9
5.0 Resources & Schedule	10
Table 5.1: Milestones and Date of Delivery	11
6.0 Evaluation	11
6.1 References.....	11
7.0 Proposal Format	12
APPENDIX A:.....	13

1.0 Background

The Fraser Valley communities (Mission, Abbotsford, Chilliwack, Kent, Harrison Hot Springs, & Hope) are growing rapidly and demand for transit in the region has also grown. Today, the population of the Fraser Valley Regional District (FVRD) is approximately 260,000. In the last ten years, population growth has been approximately 1.5 percent per year. This growth rate is forecast to continue, and the population of the FVRD is anticipated to reach approximately 410,000 by 2030.

The Provincial Transit Plan (PTP) is British Columbia's new strategy for expanding fast, reliable, green transit. The PTP is a major part of the Ministry's broader transportation strategy, which strengthens our sea, air, and land gateways. It is the Ministry's vision for an inter-connected transit grid, made up of a range of green travel options. The PTP would see investment in transit increasing the market share for transit in Metro Vancouver and the Fraser Valley substantially by 2030. The PTP aims to double ridership through investments in transit service, vehicles, and infrastructure. The need for reliable, consistent, and efficient transit has also been identified in the Fraser Valley Regional District's regional growth strategy.

Achieving the transit goals determined for the valley will likely require increased transit service to meet the growing demand for local transit within the municipalities and for inter-municipal and inter-regional travel. Local transit service currently operates in Abbotsford and Mission (ValleyMAX) as well as Chilliwack and Kent. Inter-regional service in the Fraser Valley currently includes the West Coast Express (commuter rail service linking Mission with downtown Vancouver) and Greyhound Bus Lines. There is also an interest in understanding whether other rail lines (including the southern rail line which runs from Abbotsford to Delta) are feasible transit options to service the transit demand in the Fraser Valley. The ValleyMAX transit system includes inter-municipal service connecting Abbotsford and Mission. Recently Translink and ValleyMAX have instituted bus based inter-regional services between Abbotsford and Aldergrove, and there are plans to expand the transit links between Abbotsford and Metro Vancouver.

2.0 Purpose

The Fraser Valley Regional District, BC Transit, Translink, and the Ministry of Transportation (herein referred to as "the partners") would like to develop a long-range transit vision for the Fraser Valley that supports local community plans, the FVRD's regional growth strategy, and the PTP. This work is being undertaken to establish a coherent vision for transit in the Fraser Valley in order to provide the context for transit planning and service delivery by BC Transit and its local government partners and potential new service delivery partnerships.

This vision would create a broad outline of transit and other transportation services in the Fraser Valley for the key PTP benchmark years of 2020 and 2030. Key measures and initiatives necessary to meet the 2020 and 2030 vision would also be identified for the interim milestone year of 2013. Transit, for the purposes of this study, means any form of public transportation from paratransit to full commuter rail. The intent of this study is to provide a series of working papers that form a logical progression in developing a foundation, vision (both regional and municipal) and concept plan for transit in the Fraser Valley.

3.0 Scope of Work

The Strategic Review of Transit in the Fraser Valley (SRTFV) paper should consist of five components as well as a Communications/Consultation Plan:

1. Foundation Paper
2. Transit Vision (Regional Level)
3. Transit Vision (Municipal Level)
4. Transit Concept Plan
5. Final Report
6. Communications/Consultation Plan

3.1 Foundation Paper

The foundation paper should achieve the following:

- A review of plans, policies and objectives related to transit, transportation, land use and greenhouse gas emissions in the Fraser Valley. This would include summarizing information from all partners with respect to their specific agencies.
- Identifying what actions and /or targets are needed in terms of modal shift, etc, to achieve current and emerging ghg reduction goals, including translating the broader PTP targets into FVRD-specific targets.
- Reviewing the institutional arrangements that exist today and identifying any amended arrangements that may be needed for the coordinated planning, management and provision of transit and other transportation services in the valley.
- Examining the existing and needed funding sources needed to reach an identified level of service.
- Examining movements of transit along key corridors to identify origin-destinations for transit ridership and perceived opportunities for growth.
- A Transit Market Analysis capturing both “captive” and “choice” ridership with current and forecasted trends (*see 3.1.1 below*)

Note: The proponent may wish to consult the following areas of interest:

- Review the transit, transportation, and land use policies and objectives included in Official Community Plans in Fraser Valley municipalities
- Review all relevant provincial plans and initiatives including the PTP, climate change/ghg-reduction and related initiatives.
- Review the transit, transportation, and land use policies and objectives included in the FVRD’s Regional Growth Strategy and Long Range Transportation Strategy
- Review the policies and objectives included in the Central Fraser Valley Transit Business Plan, the South of Fraser Area Transit Plan, and other BC Transit and Translink planning documents that relate to the Fraser Valley.

3.1.1 Transit Market Analysis

The market analysis describes current transit markets and forecast future markets for 2020 and 2030 as well as examining the needed market share and levels of ridership to meet both provincial PTP and provincial ghg reduction targets. The work may comprise of activities such as:

- Examining the existing market and ridership for transit in the Fraser Valley using any available transit ridership data, general travel surveys, passenger surveys and public surveys. Identifying (i) both “captive” and “choice” transit markets and (ii) the levels of ridership needed to meet both provincial transit plan and ghg-reduction targets.
- Identifying any existing and emerging demand-side considerations that will also affect modal choice and ridership targets such as ghg-reduction, fuel price or availability trends, etc.
- Examining projected demographic and land use trends and how this will impact the future demand for transit in the region This includes changes in age structure, distribution of residential and commercial development, and the location of major trip generators.
- Identifying all ‘significant’ generators such as hospitals, universities and colleges and comment on any physical access or other changes needed to service these facilities.
- Identifying ‘special’ markets in the FVRD such as those for potential ‘U-Pass’ type arrangements as well as services for the mobility-impaired. However, in doing so it must comment, as needed on the financial viability or business case of such initiatives.
- Developing forecasts of transit demand and desirable transit levels for 2020 and 2030, including local, inter-municipal, and inter-regional transit. This forecast needs to consider the impact of greatly increased transit service and new transit types (such as Rapid Bus) on future transit demand. All other assumptions also need to be stated. (Note given the current rapid changes in fuel prices and the challenge of calibrating a model to areas where data is limited and ridership is low, the consultant should not assume that a traditional 4-part modeling exercise using a model such as EMME 2 must be undertaken or should be used in isolation of other approaches).

3.2 Transit Vision (Regional Level)

The transit vision at the regional level should project transit services, infrastructure and ridership to the time horizons of 2020, and 2030. This should include a conceptual outline of transit service types and service levels required to meet:

- the projected demand for regional and inter-regional transit trips under a scenario to reflect the PTP and ghg reduction targets. This paper should comment on the reasonableness of this scenario and amend or interpret according to actual forecasts versus simply doubling ridership as per current targets.

The transit vision for the Fraser Valley will give due consideration to local, regional, and Provincial goals related to transportation, land use, climate change and any other relevant considerations including:

- Outline conceptually, current service types and general service levels for transit at the regional level and how this service meets the demand from the various transit markets.
- Undertake an assessment of the relative priority of each of the above markets or service types giving due consideration to goals and factors such as creating regional transit network, serving all trips and trip purposes, how transit might be used to connect communities, maximizing ghg reduction potential, changing energy prices, etc., relationships to cycling initiatives or other paratransit initiatives, etc.
- Provide projections of transit service, ridership and mode share for inter-regional service under a PTP-and ghg supportive scenarios.
- Discuss how the transit vision can support regional land use goals including the desire for more compact, mixed-use development.

- Outline supporting strategies that can be used to encourage greater transit ridership including transportation demand management and fare strategies.
- Describe (at a conceptual level) the fleet and infrastructure to support transit on major corridors. The latter could include transit garage facilities, exchanges or stations, bus stops, park and ride facilities, technology and ITS and security.
- For the interim milestone year of 2013, identify, at a conceptual level, the phasing, needed resources and initiatives for the above scenarios.

3.3 Transit Vision (Municipal)

The transit vision at the municipal level should project transit services, infrastructure and ridership to the time horizons of 2020, and 2030. This should include a conceptual outline of transit service types and service levels required to meet:

- The projected demand for municipal and inter-municipal transit trips under a scenario to reflect the PTP and ghg reduction targets. This study should comment on the reasonableness of this scenario and amend or interpret according to actual forecasts versus simply doubling ridership as per current targets.

Again, the transit vision here would give due consideration to local, regional, and Provincial goals related to transportation, land use, climate change and any other relevant considerations including:

- Outline conceptually, current service types and general service levels for transit at the municipal level and how this service meets the demand from the various transit markets.
- Undertake an assessment of the relative priority of each of the above markets or service types giving due consideration to goals and factors such as creating complete communities, serving all trips and trip purposes, how transit might be used to create density in communities, maximizing ghg reduction potential, changing energy prices, etc., relationships to walking and cycling initiatives, etc.
- Provide projections of transit service, ridership and mode share for local service under a PTP-and ghg supportive scenarios.
- Discuss how the transit vision can support local land use goals including the desire for more compact, mixed-use development.
- Outline supporting strategies that can be used to encourage greater transit ridership including transportation demand management and fare strategies.
- Describe (at a conceptual level) the fleet and infrastructure to support transit, especially on major municipal corridors. The latter could include transit garage facilities, exchanges or stations, bus stops, park and ride facilities, technology and ITS and security.
- For the interim milestone year of 2013, identify, at a conceptual level the phasing, needed resources, etc. for each type of service, by community (municipality) for each of the above scenarios.

3.4 Transit Concept Plan

The transit concept plan outlines the operating and capital budget projections to meet the 2020 and 2030 vision and the measures and initiatives recommended to implement the transit visions as presented in the earlier papers. This would include (but not be limited to) discussion around investments in key corridor identified, services, infrastructure, and

other transit accommodation measures. This plan may also include a funding strategy with likely roles from the partners of this study and Fraser Valley local governments.

- Provide operating and capital budget projections to meet the 2020n and 2030 vision.
- Provide a high-level evaluation of all scenarios proposed along with associated costs and benefits. This information should be provided in a form that could easily be incorporated into future business cases.
- Outline various funding scenarios that demonstrate how these investments horizons could be achieved are where that funding would have to come from (potential new or reallocated funding sources and, if applicable, potentially revised institutional arrangements).
- Discuss the roles and responsibilities of the partners and Fraser Valley local governments in implementing the transit vision and comment the financial implications of achieving that vision.
- Describe the process for moving from the current transit environment in the Fraser Valley to the 2020 and 2030 transit vision.
- For the interim milestone year of 2013, more detail in terms of measures and initiatives required to meet the 2020 and 2030 vision.

3.5 Final Report

The final report of this strategic review analysis of transit in the Fraser Valley should contain the following:

- Executive summary
- Highlights from each of the working papers
- Evaluation of preferred options in priority for the Fraser Valley
- Conclusion and recommendations

3.6 Communications/Consultation Plan

SEE APPENDIX A FOR FLOW CHART. For the purposes of this study, the proponent will work directly with the project manager (Ashok Bhatti, Ministry of Transportation) for this study with a communication/consultation involving the following three groups:

- The Technical Steering Committee (TSC): A group of individuals representing the technical expertise from each of the partners of this study. This group will provide information, ongoing technical input and advice, and final approval of each of the working papers of this study. The proponent will meet regularly with this group to provide interim, draft, and final reports.
- The Executive Committee (EC): Consisting of a representation of Mayors from each of the Fraser Valley communities, this group will be asked for feedback at determined intervals within this study to ensure their endorsement of the work completed.
- A Peer Review Committee (PRC): This will form an independent panel of experts as nominated by the TSC to review the work papers as produced by the proponent and provide to the project manager a value analysis of the recommendations and proposals put forward. The PRC may have involvement throughout or at the completion of the entire project.

Stakeholder consultation will also be a critical factor in the success of this study and the adoption of any of the recommendations arising from it. The proponent will be asked to host public open houses in each of the communities identified in this paper. The proponent will prepare support material required for the open houses and collect and incorporate feedback.

4.0 Key Deliverables

Key deliverables for this assignment are expected to include (at a minimum):

- A resilient strategic review of transit in the Fraser Valley upon which a long-term transit strategy for the Fraser Valley can be developed.
- The design and implementation of an effective **Communications/Consultation Plan** (See 3.5) The Consultant will be expected to independently contact approved agencies and stakeholders. The Consultant will obtain approval from the Project Manager prior to contacting stakeholders and other outside agencies.
- The Consultant will provide a **Quality Management Plan**. This should reflect a similar type of plan that is required by the Quality Management Accord between the BC Ministry of Transportation and the Consulting Engineers of BC, This plan will provide the partners with certainty relating to the deliverables with limited requirements for internal (staff level) technical reviews.
- A monthly, memo style, **Progress Report** submitted to the Project Manager(s), in electronic format, by the first Friday of the next month, clearly explaining what work has been completed, what work is in progress, what work is forthcoming, issues needing direction or clarification, and confirmation of the project schedule. These reports are to be transmitted electronically.
- The preparation and presentation of **Working Papers**, with one for each component described in the Scope of Work. These **Working Papers** will ultimately form chapters in the final report. In addition, the consultant may wish to produce other working papers or other documentation describing for example, any forecasting or evaluation methodologies to be used in particular stages, if these are not detailed in the proposal. The proponent should clearly identify such opportunities and provide supplemental costs to these items. All of the Working Papers and other committed documents are to be transmitted electronically.
- The preparation and presentation of a **Draft Final Report** of the preliminary findings and recommendations to the Technical Steering Committee and the Peer Review Committee. Color copies of the draft final report will be required along with a .pdf version.
- The preparation and presentation of a **Final Report** of the study process, results and recommendations to the Technical Steering Committee, the Executive Committee, and the Peer Review Committee (if decided by the PM). A final report to contain a concise Executive Summary for a non-technical audience, able to stand alone, that clearly details all of the work undertaken. The report must be comprehensive and include planning

analysis, option development, the evaluation framework, the evaluation process, cost estimates, recommendations, and staging.

- The report will be fully supported by tables and graphics, the listing and justification of all assumptions, data and background material compiled, and analyses undertaken. Colour copies of the final report will be required along with a .pdf version. A digital copy of all supporting data and/or working documents should also be provided, including survey results, transit market evaluations, presentations, and forecasting outputs and worksheets.
- The consultant's performance will be assessed at the end of the project and discussed at an Evaluation Meeting, in accordance the standard Ministry procedure. Once signed by the Project Manager and the consultant representative, the evaluation will become part of the RISP database.
- Payment to the consultant will be monthly subject to satisfactory completion of milestones as specified in the project schedule. Allow 10% of contract value as holdback, pending Ministry of Transportation acceptance of final report on behalf of the partners.

4.1 Technical Committee Responsibility

NOTE: While the Partners will strive to provide adequate and timely information, the Consultant shall review in detail all this information to ensure it provides all the details necessary for a comprehensive, thorough and accurate *transit study*.

The Partners will undertake the following with respect to the Project as required:

- Provide access to all available pertinent reports, inventories and correspondence that will assist in the planning process;
- Depending on the work plan proposed by the successful consultant, review and advise the consultant when they have signed-off on milestone reports and working papers which may have downstream dependencies.
- Determine the acceptability of all proposed sub-consultants assigned work on the Project;
- Critically review the work as it proceeds and advice on matters regarding standards, guidelines and policy. This review does not constitute an acceptance of liability by the Partners or its employees for the product, but is solely conducted as a Quality Assurance check;
- Assess and approve all scope changes, revisions to the planning criteria and changes to the schedule;
- Provide any available traffic or transportation demand data associated with Provincial or other networks of roads, transit services or other travel modes ; and

- Provide mapping at an appropriate scale for all concepts for transit service.

The Ministry of Transportation requires that a consultant's performance shall be monitored at regular milestone intervals during the course of this assignment. This is most likely to be through the completion of form H0503 – RISP Performance Evaluation or a substantially similar process (Note the Partners will provide feedback as part of this process). The consultant should identify and accommodate *two* evaluation meetings as part of the work plan for this assignment. Final agreement on the number and timing of these evaluation meetings will be reached at the Project Initiation meeting with the Partners.

5.0 Resources & Schedule

The following resources should be consulted and incorporated in this study:

- Provincial Transit Plan: www.th.gov.bc.ca/Transit_Plan/index.html
- Translink 2040 Vision & Area Transit Plans: www.translink.bc.ca/Plans_Projects/AreaTransit/default.asp
- BC Transit: www.bctransit.com/regions/cfv/documents/business_plans.cfm
- Fraser Valley Regional District - Regional Growth Strategy www.fvrd.bc.ca/About%20the%20FVRD/regionalgrowthstrategy/Pages/default.aspx

The current funding allocation for this contract is **\$400,000**. Proposal submissions should be based upon this level of effort. The Partners will consider recommended or additional tasks that may be deemed beneficial to the overall process by the consultant beyond this level of effort; however, **these tasks must be clearly identified as being provisional or separate in the proposal and the fee estimate.**

The timeline proposed for the completion of the study and its associated working papers is as follows:

Table 5.1: Milestones and Date of Delivery

Milestones	Date of Delivery
Interim Status Report	September 2008
Part 1: Foundation Paper	November 2008
Part 2: Transit Vision (Regional)	March 2009
Part 3: Transit Vision (Municipal)	May 2009
Part 4: Transit Concept Plan	July 2009
Draft of Final Report	Sept 2009
Final Report & Associated Documents	Sept 2009

6.0 Evaluation

Representatives from the Partners will complete the evaluation of the proponents. This section details the criteria against which proposals will be evaluated. Proponents should ensure that they fully respond to all criteria in order to receive full consideration during evaluation.

Criterion	Weight
The Team (40 points) – Min (30 points)	
Related Team Experience, Qualifications, & Availability	40
The Proposal (60 points)	
Project Understanding, Identifying Key Issues, & Challenges	15
Project Management	5
Methodology	25
Quality management	5
Originality / Alternatives	10
Total	100

In addition, the evaluators will take into consideration the overall schedule and format of the proposal in make a final selection. While these factors are not scored, they will be considered. The submission from each proponent should use the following format for its submission:

Maximum score is 100 points. To be eligible for consideration the proposal must have:

- A minimum score of 60 points for the entire proposal; and
- A minimum score of 30 points for “The Team” criterion.

6.1 References

Further to the evaluation above, each proponent is asked to submit **two specific references** of projects in similar scope and size. These references should be complete with contact information as the Ministry on behalf of the Partners will contact one (or both) of the stated references for the highest scoring proponent. The Ministry will not enter into a contract with any proponent whose references are found to be unsatisfactory.

7.0 Proposal Format

This is a milestone deliverable-based contract to be evaluated using the two-envelope system. Envelope 1 is to be clearly marked as the “Technical Proposal – Transit in the Fraser Valley” (four copies) and Envelope 2 (one copy) as “Financial Proposal – Transit in the Fraser Valley”. Both envelopes should be forwarded as a package clearly marked as to the name of the project and the title of the assignment.

Envelope 1 should contain information with respect to the following:

- Project understanding, identifying key issues, & challenges
- Project Management and quality assurance structure. This includes the firm’s capacity, capability, and proponents approach to delivering this work.
- Project Team with related experience, qualifications, and availability. The names, responsibilities, and location of staff that would be assigned to this project. Those working for the consultant and those working for sub consultants should be identified along with the type of tasks to be undertaken by the individuals. It is also required that a list current project commitment by proposed project team members
- Methodology proposed for completing the study. The proponent should include any innovative or alternative options they feel would assist in completing this study.
- Two references for work of a similar scope and size;

The fee schedule in Envelope 2 only should include the following information:

- Hourly rates for all staff to be included in the proposal;
- Hours assigned to each staff member and sub-consultant for each of the identified list of tasks;
- Any other anticipated general costs and disbursements; and
- Project milestones;

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

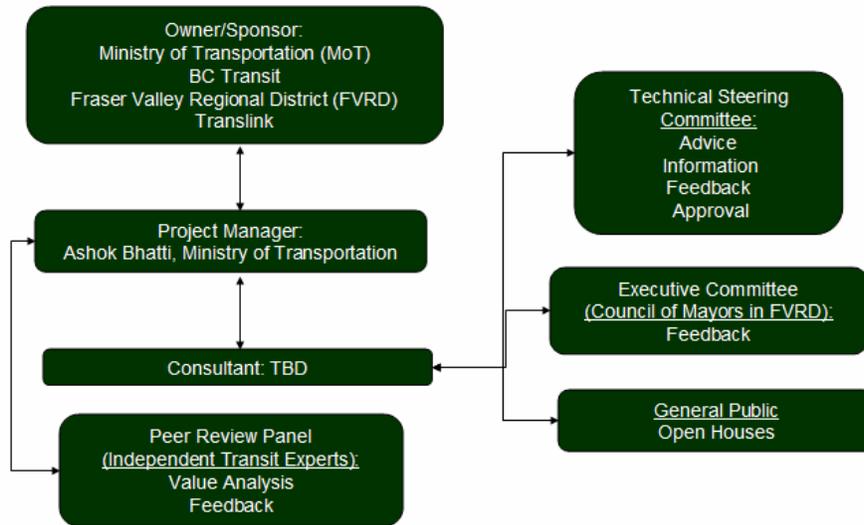
- An unaltered, completed and signed RFP cover page including Proponent Section;
- Table of contents including page numbers;
- A short (one or two page) summary of the key features of the proposal; and
- The body of the proposal, i.e. the “Proponent Response”.

***THE TECHNICAL PROPOSAL SHOULD BE NO MORE THAN 40 PAGES (INCLUDING RELEVANT APPENDICES). Submissions by the proponent will be evaluated according to this format (see 6.0: Evaluation).

APPENDIX A:

Project Structure

COMMUNICATION STRUCTURE



Communication/Consultation Plan

