

# Draft Scope of Work

## Thomas Jefferson Region Transit Governance Study

12/28/2021

The Thomas Jefferson Planning District Commission seeks the services of a general transportation planning firm to conduct a governance study on the regional transit system in the Thomas Jefferson Planning District to include the organizational structure of existing transit systems and governance options for a regional authority. The Thomas Jefferson Planning District is exploring mechanisms to support regional coordination and planning around transit operations and increase transportation investments and outcomes. The 2022 Regional Transit Vision Plan<sup>1</sup> recommends forming a regional authority to collect additional revenue in support of regional transit planning and services. This Governance Study will answer the following questions.

1. What is the appropriate governance structure to move the identified regional transit priorities forward?
2. What are the pros and cons of adopting the identified alternative governance structures? For example, how would the identified governance structures:
  - a. Support regional coordination and planning around transit operations, and
  - b. Increase transit investments for the region.
3. How can rural localities participate in the governance structure? For example, several of the rural counties have expressed an interest in expanding transit services in their area. However, they also expressed a desire to know what services will be provided for their investment.

### Study Background

The transit service area for the Thomas Jefferson Planning District includes the City of Charlottesville and the Counties of Albemarle, Fluvanna, Greene, Louisa, Nelson, and Buckingham, and includes the following transit and pupil transportation providers:

- The City of Charlottesville, Charlottesville Area Transit (CAT) and Pupil Transportation,
- Jaunt, including Greene County Transit,
- University Transit Services (UTS), and
- Albemarle County Public School Transportation Services Department.

The Thomas Jefferson Planning District Commission<sup>2</sup> has a total population of 234,712, with 43,475 individuals living in the City of Charlottesville and 98,970 living in Albemarle County, according to the 2010 Census. The population of the region was expected to grow by more than 11% between 2010 and 2020, with a growth rate of more than 21% within the City of Charlottesville; these anticipated rates of growth are significantly higher than that of the

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<sup>1</sup> This study will be completed in the Summer of 2022.

<sup>2</sup> Does not include Buckingham County.

Commonwealth at just over 9%.

The Charlottesville-Albemarle Metropolitan Planning Organization consists of the City of Charlottesville and the urbanized portions of Albemarle County. It currently contains a total of 243 square miles, with a 2020 population of 139,723.

The [Housing and Transportation Fact Sheet](#), published by the Center for Neighborhood Technology, rates Region 10 or the Thomas Jefferson Planning District with a transit performance score of 2.5 out of 10, with 10 being the best, and with a job access of 3.6. The more urbanized areas that make up the Charlottesville-Albemarle Metropolitan Planning Organization, have a transit performance score of 4.1 with a job access of 5.

The average household in the in the Thomas Jefferson Planning District spends approximately 23% of their income on transportation costs, according to the Housing and Transportation Affordability Index. In the Charlottesville-Albemarle MPO area households spend an average 21% of their income on transportation.

Workers commute across our region. Each day, over 18,000 workers commute into the City of Charlottesville from outside of it, with the largest portion (>12,000) coming from Albemarle County, according to Virginia Works.<sup>3</sup> Over 6,500 people commute within the City of Charlottesville. And, each day, over 14,000 workers commute into Albemarle County from outside of it. Over 16,000 workers commute within Albemarle County.

The three main transit service providers in the region (CAT, Jaunt, and UTS) overlap in service areas and provide slightly different types of services. CAT provides traditional transit services to the City of Charlottesville, the University of Virginia, and parts of Albemarle County. Jaunt provides the ADA complementary service for CAT, some regional commuter services, and contracted services for rural areas and human services providers. UTS provides bus service for employees and students at the university and the UVA healthcare system. UTS's services are open to the public and serve areas beyond the campus. At the moment, none of the providers are charging fares. The service providers share stops, and customers transfer between the systems. However, each system is branded separately with their own schedules and customer service systems.

The division of services and dynamics of the providers create redundancies and make coordination of services difficult. The Regional Transit Partnership was created in 2017 to facilitate coordination among the transit providers and serve as a precursor towards establishing a regional transit authority.

Several re-occurring factors continue to highlight the need for a regional authority in the Thomas Jefferson Planning District to facilitate regional transit planning and increase revenue streams. As illustrated in reports dating back to 2005, the Thomas Jefferson Planning District

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<sup>3</sup> <https://virginiaworks.com/community-profiles>

Commission, Charlottesville-Albemarle MPO, regional governments, and community groups have identified a need for greater regional coordination and expansion of transit services. Several of the studies recommend establishing some form of a regional authority to generate additional revenue streams and facilitate regional transportation planning and coordination.

In 2008, the Thomas Jefferson Regional Planning District Commission (TJPDC) produced a *Transit Authority Study*. This study explored the potential for consolidating the region's three transit systems into a single entity. The plan resulted in the State's General Assembly approving enabling legislation, § 33.2-2800 of Title 33.2 in 2009, allowing the region to establish a Regional Transit Authority (RTA). The jurisdictions failed to enact funding mechanisms and the RTA was not formed.

In 2017, the Planning and Coordination Council (PACC), consisting of representatives from Albemarle County, the City of Charlottesville, and the University of Virginia, asked the TJPDC to reexamine opportunities for improved communication, coordination, and collaboration on transit matters. The resulting *Regional Transit Coordination Study* found that *"the region's transit systems suffer from an overly complex, informal, and disorganized system for coordinating with each other and with stakeholders resulting in: misunderstandings, local conflicts, uncertainty and mistrust between stakeholders, and lost opportunities"*. (TJPDC, *Regional Transit Coordination Study*, 2017)

The *Regional Transit Coordination Study* recommended establishing the Regional Transit Partnership (RTP) to provide a venue for coordination among transit providers, as a precursor to forming a Regional Transit Authority. The report stated that: *"the RTP could serve an interim body, responsible for ushering the development of an RTA, if the region determines to consolidate transit systems into a single entity"*. (TJPDC, *Regional Transit Coordination Study*, 2017)

In 2017, the City of Charlottesville, Albemarle County and Jaunt, in partnership with the Virginia Department of Rail and Public Transportation formed the RTP to serve as an official advisory board and provide recommendations to decision-makers on transit-related matters. The RTP's 2018 *Strategic Planning Retreat* found that the transit providers and regional authorities needed to:

- build trust and better agreements,
- develop a regional transit vision, and
- regional long-range transit plan.

In 2021, the RTP, in partnership with Albemarle County, the City of Charlottesville and DRPT, initiated a study to collaboratively develop a clear vision for the future of high-quality transit in the region resulting in the *Regional Transit Vision Plan*<sup>44</sup>. This plan identifies transit service opportunities and suggests that the region form a regional authority to levy additional funding to support the recommended transit services.

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<sup>44</sup> Final Report to come in Summer 2022.

In addition to the *Regional Transit Vision Plan*, the County of Albemarle, in partnership with the TJPDC and DRPT, conducted a study to identify additional near-term transit service opportunities for the county. The recommended services to expand transit in Albemarle County are estimated to cost about \$4 million dollars.

Based on previous studies and continued jurisdictional requests the TJPDC believes that a DRPT technical assistance grant funded governance study is the next step in addressing the region's transit coordination and funding needs. A Governance Study will identify a structure with formal agreements that all the jurisdictions can support allowing mechanisms for increased revenue to support the region's transit vision.

### Study Purpose and Objectives

The purpose of this study is to improve and increase transit services in the Thomas Jefferson Planning District. The 2022 Regional Transit Vision Plan identifies transit services and community goals for transit. This governance study will help identify strategies the community can use to achieve the priorities and goals identified in the Regional Transit Vision Plan. This study will answer the question—

*What is the appropriate governance structure to move the identified regional transit priorities forward?*

The study will identify options to create opportunities for localities to expand transit operations, including opportunities for rural localities' engagement with transit expansion. The study will measure the political will and other obstacles to implement the options identified.

### Study Administration

The Thomas Jefferson Planning District Commission (TJPDC) will manage this study with the technical assistance of a qualified consulting firm. The study will evaluate the decision making and governing structures around transit services on a high level with a focus on accountability, maximizing resources, and implementing transit service improvements recommended in the Regional Transit Vision Plan. It will also engage stakeholders in the Thomas Jefferson Planning District to facilitate policy discussions among member jurisdictions.

Both TJPDC and the CONSULTANT will designate Project Managers through which all formal communications related to the Study will be exchanged. The Regional Transit Partnership will serve as the advisory board for the study.

### Consultant Engagement and Study Schedule

The Thomas Jefferson Planning District Commission seeks the services of a general transportation planning firm to develop recommendations for transit governance and investments in the Thomas Jefferson Planning District. The time-period for the work described in this scope is approximately 18 months from issuance of Notice to Proceed. The study will

start in the Summer of 2022, after DRPT grants are awarded and end approximately 18 months after the start date.

## Study Budget

The contract between TJPDC and CONSULTANT is a Cost-plus Fixed Fee contract. Total cost of the contracted work shall not exceed \$150,000. A monthly invoice will be submitted by the CONSULTANT to TJPDC, along with a monthly progress report. The invoice and monthly progress report will provide a percent complete per task item and a detailed description of the activities performed for each task and subtask item. The percent complete should be tied to the dollar value that is placed on each task item, with the invoice amount reflecting the percent complete of each task.

## Scope of Service: Study Phases, Tasks and Deliverables

The following steps are suggested to complete a study that will identify formal structures to facilitate the coordination and expansion of regional public transportation services. The following task items are not intended to be all inclusive. A full proposal should provide a complete list of tasks, sub-tasks, and delivery dates associated with this project, including regularly scheduled team meetings.

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### Phase 1: Existing Conditions Assessment

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The existing conditions assessment will review existing governance structures and revenue streams related to transit in the Thomas Jefferson Planning District and review legislative authority<sup>5</sup> granted to the TJPDC region.

#### Task 1.1 Assessment of Current Transit Services, Administration, and Investments

The following organizations would be part of the Assessment: Regional Transit Partnership, University Transit Service, Charlottesville Area Transit, school transportation for Albemarle and Charlottesville, and Jaunt. The assessment would include a high-level outline of the following:

- 1) sources of transportation funding and average amounts
- 2) recipients of the transportation funding
- 3) Governing body or mechanism to allocate transportation funds and measure outcomes

#### Task 1.2 Stakeholder Engagement

The consultants would meet at least once with each of the organizations listed in Task 1.1 to introduce the study and learn about the organization's governance related to transit. During these meetings the consultants will also gather information about the legal, technical, and political obstacles to forming a regional transit authority from the perspectives of the providers and partners.

The TJPDC will host a stakeholder kick-off meeting during the RTP meeting for the consultants

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<sup>5</sup> [Title 33.2. Highways and Other Surface Transportation Systems, Chapter 28. Charlottesville-Albemarle Regional Transit Authority](#)

to introduce the study and establish a consensus around goals for the governance study. Representatives from all jurisdictions will be invited to the RTP kick-off meeting.

#### Task 1.3 Assessment of Current Legislative Authority

Section 33.2-2800 of Title 33.2 Highways and Other Surface Transportation Systems created the Charlottesville-Albemarle Regional Transit Authority. Task 1.3 will review this legislative authority and develop an assessment of the current strengths and weaknesses of the existing legislation, and areas where it needs to be strengthened to be effective.

#### **Deliverables:**

- 1) Initial meetings with the Regional Transit Partnership, University Transit Service, Charlottesville Area Transit, school transportation for Albemarle and Charlottesville, and Jaunt and related meeting presentation and materials
- 2) Review of the legislative authority for the Charlottesville-Albemarle Regional Transit Authority assessing the effectiveness of the existing legislation and identifying areas where further clarification or revisions would be needed
- 3) Outline of current transit governance in the Thomas Jefferson Planning District related to decision making and oversight with evaluation of effectiveness regarding accountability, services, planning, and maximizing financial investment
- 4) Kick-off presentation at a Regional Transit Partnership meeting

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### Phase 2: Peer Regional Transit Governance Structures

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Phase 2 will provide examples of successful regional transit authorities in areas with similar characteristics as the Thomas Jefferson Planning District.

#### Task 2.1: Peer Governance Structure Review

Conduct a review of governance structures for at least three peer regional transit systems to provide further context and insight into potential transit governance strategies for the Thomas Jefferson Planning District. The peer governance structures could be selected and evaluated on the following criteria:

- Service area demographics: service area population, service area square miles, and population density;
- Number of transit providers in the region and the agencies' sizes: vehicles operated in maximum service, number of modes, number of employees, and total operating budgets;
- Operating Characteristics: total annual vehicle revenue miles, total annual vehicle revenue miles per capita, total annual vehicle revenue hours per capita; and
- Governance structure and funding: governance type, board size and composition, qualifications for members, selection of officers, committees, roles, voting and veto authority.

#### **Deliverables:**

- 1) Document reviewing governance structures for regions that have similarities to the

## Thomas Jefferson Planning District

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### Phase 3: Potential Revenue Generation

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Phase 3 will demonstrate the potential to generate increased revenue to support transportation projects and services in the Thomas Jefferson Planning District.

#### Task 3.1 Develop Strategies to Increase Revenues for Transit

Evaluate potential funding model/opportunities to implement the recommendations from the Regional Transit Vision Plan based on potential revenue and regional support.

- a. Identify potential revenue sources to support transportation
- b. Estimate potential revenues, outside of the general funds designated to each jurisdiction for transit
- c. Identify revenue trends over 5 years
- d. Develop at least three revenue models

#### Task 3.2 Stakeholder Engagement

Present revenue estimates to the Regional Transit Partnership at their regular meeting. Representatives from all jurisdictions will be invited.

#### **Deliverables:**

- 1) Presentation to the Regional Transit Partnership with estimated revenue streams, their worth, and with five-year projections

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### Phase 4: Develop alternative governance scenarios

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Phase 4 will introduce possible governance structures to manage the additional revenue streams identified in Phase 3. It will devise a system to ensure oversight of the finances and propose funding allocation scenarios.

#### Task 4.1 Governance Scenarios

Develop at least two governance scenarios based on assumed revenue streams and service recommendations from the Regional Transit Vision Plan. The scenarios would include the following items.

- Make-up of the board/membership with consideration of changes that may need to be made to the existing legislation
- Role of the authority in decision making and transit planning
- Role of transit providers
- Performance indicators and accountability
- Participation opportunities for rural counties
- Participation opportunities for school transportation for Albemarle and Charlottesville
- Administrative cost burden

#### Task 4.2 Funding Allocation

Develop at least two scenarios for the allocation of funds, including consideration of the rural

jurisdictions.

- Recommendations for the distribution of the funds
- Incentives that would increase participation from localities, including a rural component

#### Task 4.3 Stakeholder Engagement

Present the alternatives developed to the Regional Transit Partnership for comment and refinement. Meet with each jurisdiction in the Thomas Jefferson Planning District, including Buckingham County, if appropriate, to measure their interests in participating in an alternative governance structure and collecting additional revenue for transit.

#### **Deliverables:**

- 1) Outlines of at least two alternative governance structures that would include either only urban areas or both urban and rural areas.
- 2) Outline of at least two funding allocation scenarios
- 3) Presentation to the Regional Transit Partnership
- 4) One meeting with each jurisdiction

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### Phase 5: Evaluate and Recommend Governance Structures

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Phase 5 will combine all the information collected above to compare the scenarios developed above to criteria established from the goals identified in Task 1.2 to generate a matrix of governance scenarios. The matrix will be discussed with the stakeholders and based on the matrix and stakeholder input, a recommended governance structure with next steps will be published in a final report.

#### Task 5.1 Evaluate Alternative Governance Structures

Evaluate or rate the developed alternative governance scenarios compared to the current existing conditions, with existing Charlottesville Albemarle Transit Authority legislation to maximize transit investments and outcomes in the Thomas Jefferson Planning District. Develop criteria to be used to evaluate the alternative structures based on the goals established in task 1.2. Evaluate all alternatives based on the developed criteria which could include the following topics.

- Political feasibility
- Administrative feasibility
- Equity impacts
- Establishment of accountability for transit funding
- Maximizing financial investments
- Service outcomes
- Long-range outcomes (sustainability)
- Possible options for rural jurisdictions to be a part of the governance structure OR purchase services from the providers

#### Task 5.2 Stakeholder Engagement

Present the alternatives with their evaluations based on the criteria above to the Regional Transit Partnership. Present the alternatives and evaluation to jurisdictions and facilitate



discussion to select most appropriate alternative.

#### Task 5.3 Recommendations and Next Steps

Develop a final report outlining the previous steps in the study, recommending a governance structure, and suggesting implementation strategies or next steps for the Thomas Jefferson Planning District to reach its transit expansion goals.

#### Task 5.4 Stakeholder Outreach- Final Presentation

Present the final report and recommendations with next steps to the Regional Transit Partnership.

#### **Deliverables:**

- 1) A matrix of governance structures with ratings based on the criteria above to engage stakeholders in the selection of an alternative governance structure to support regional transit expansion.
- 2) Two presentations to the Regional Transit Partnership, one presentation to present the matrix and one to present the final report, recommendations, and next steps
- 3) One or more meetings with each jurisdiction or as a group
- 4) Final report consolidating the above discussions and research with recommendations and next steps