



## MEMORANDUM

**To:** RRRC Executive Committee  
**From:** Patrick L. Mauney, Executive Director  
**Date:** January 30, 2023  
**Subject:** RRRC Application to DRPT for FY 2024 Technical Assistance Program

You may recall that the Commission was awarded \$20,000 in funding in FY 2023 to support an update of the Commuter Services Strategic Plan, which is a requirement of each Commuter Assistance Program overseen by the Department of Rail and Public Transportation (DRPT). Those

Subsequent to that award in July, Commission staff have received a cost estimate from Berkley Group under our on-call contract and will need to make an additional request to supplement the FY 2023 award for the Strategic Plan. Commission staff will request \$7,500 from DRPT to be matched by \$7,500 in Commission funding.

A copy of the Berkley Group cost estimate is attached, as is the draft scope for submission to DRPT.

**REQUESTED ACTION:** Approval for RRRC staff to submit the FY 2024 Technical Assistance grant applications to the Department of Rail and Public Transportation and to authorize the Executive Director to execute the contract documents upon successful receipt of the grant

## Scope of Work: RRRC Commuter Services CAP Strategic Plan

### Background

This scope of work is a draft listing of tasks projected to be included in the development of a Commuter Assistance Program Strategic Plan (CAPSP) for the Rappahannock-Rapidan Regional Commission (RRRC) Commuter Services program. This document is included as part of the RRRC application to the Department of Rail and Public Transportation's Technical Assistance Grant program.

### Study Purpose

The Rappahannock-Rapidan Regional Commission operates the RRRC Commuter Services program, with funding through the Department of Rail and Public Transportation (DRPT) and local governments in the region. A Commuter Assistance Program Strategic Plan is required for agencies that seek operating funds from DRPT in future years. This major update to the RRRC Commuter Services CAPSP will include the following sections:

1. Commuter Assistance Program Overview
2. Service Area Demographics and Characteristics
3. Strategic Vision, Goals and Objectives
4. Marketing Plan (Target Markets, Customers, and Equity)
5. Commuter Assistance Program Operating Plan (Six-Year Plan)
6. Financial Plan
7. Monitoring & Evaluation Plan

The study will help RRRC further integrate the Commuter Services program with other transportation plans and programs in the region, and should also enable the program to identify opportunities and changes relevant to the program in the context of increased remote work options and transportation behaviors in response to impacts of the COVID-19 pandemic.

### Task 1: Project Administration & Coordination

Task 1 will run for the duration of the project and cover project coordination and project management. RRRC staff, including existing Commuter Services' staff members, the Executive Director and/or other agency planning staff, will serve in the coordinating role at the Commission to oversee consultant procurement, management, and coordination with local, regional, and statewide stakeholders.

#### ● Deliverables

- Monthly meetings with RRRC staff, consultants, and stakeholders (mix of virtual and in-person)
- Reporting, as required by DRPT
- Plan Adoption Procedures

**Task 2: Strategic Plan Development**

The consultant team (not yet identified) will be tasked with developing the CAPSP following the requirements and guidance provided by DRPT, and under the direction of RRTC Commuter Services.

For certain sections, RRTC staff will take the lead on the plan development, including the program overview and monitoring and evaluation plan. The consultant team will primarily be tasked with data collection, strategic visioning, target market/customer analysis, and operating and financial plan development.

- **Deliverables**
  - RRTC staff will develop Sections 1 and 7
  - Consultant will make draft versions of sections 2-6 available for review by RRTC Commuter Services staff and other stakeholders (may be delivered individually) and will incorporate revisions requested; minimum two (2) revision periods.
  - Final CAPSP document in electronic format

**Task 3: Data Collection**

The consultant team (not yet identified) shall collect all data as required in the CAPSP Requirements and Guidance document, as well as any additional data requested by RRTC Commuter Services. This will include, at minimum:

- Demographic information regarding RRTC Commuter Services' service area including population, household, employment trends, employer and workforce characteristic, travel patterns of residents and workers with regard to location of primary and secondary jobs, to enable development of strategies for engaging target audiences over the short, medium and long-term.
- Transportation services and facilities within the region, including transit, rail, park and ride lots and other commuter assistance supports.
- **Deliverables**
  - Summary information suitable for use in the sections described in the study purpose and CAPSP Requirements and Guidance document
  - Appendix document including tables, links, and sources for all data used in development of the plan

## Preliminary Timeline

\*This is an estimated timeline. Due to agency funding resources, RRRC submitted a Technical Assistance application in FY 2023 and was awarded \$20,000 (to be matched by \$20,000 from RRRC) from the Department of Rail and Public Transportation, to be matched by \$20,000 from RRRC.

RRRC now has a scope of work cost estimate from a consultant and is making a supplemental request to cover the total amount of the CAPSP update. As a result, an additional \$15,000 is needed, with RRRC proposing to match \$7,500 from this Technical Assistance grant request.

7/1/2022: Project Start

1/1/2023: Procurement Completed

7/31/2023: Data Collection & Analysis Completed; Draft Sections 1, 2, 3, 7 and Appendix documents available

10/31/2023: Draft Sections 4, 5, and 6 available

12/31/2023: Final CAPSP available

6/30/2024: Adoption Procedures Completed; Project End

## Budget

### FY 2024

\$15,000 – Professional Services (Consultant Fees)

### FY 2023 (Awarded July 2022)

\$20,000 – Professional Services (Consultant Staff)

\$20,000 – RRRC Salary/Fringe/Indirect (Match)

### Total Budget

Cost Item	Amount	Technical Assistance	RRRC (Match)
Professional Services (Consultant Costs)	\$35,000	\$27,500	\$7,500
RRRC Staff Time	\$20,000	\$0	\$20,000



January 10, 2023

Mr. Patrick L. Mauney, Executive Director  
Rappahannock-Rapidan Regional Commission  
420 Southridge Parkway #106  
Culpeper, Virginia 22701

**RE: Work Order 2: Major Update of RRRC Commuter Services Commuter Assistance Program Strategic Plan (CAPSP)**

Dear Mr. Mauney:

The Berkley Group is pleased to present this scope of work and quote to develop a major update of the Rappahannock-Rapidan Regional Commission's Commuter Services Commuter Assistance Program Strategic Plan (CAPSP).

If you have any questions or need additional information, please feel free to contact me at any time.

Sincerely,

A handwritten signature in black ink, appearing to read "Andrew D. Williams".

Andrew D. Williams, AICP  
Chief Executive Officer

I have reviewed the scope and fee for the associated Work Order, and I hereby give the consultant notice to proceed for the work described herein.

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Mr. Patrick Mauney, Executive Director

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Date

## **SCOPE OF WORK**

As requested, we are presenting the Scope of Work under this Work Order to develop a major update of the Rappahannock-Rapidan Regional Commission's *Commuter Services Commuter Assistance Program Strategic Plan* (CAPSP). The Scope of Work to update the CAPSP, including deliverables, will include the following tasks:

### **Task 1 - Project Management & Coordination**

The Berkley Group will manage the project and consult and coordinate with Commission staff on general project management activities as well as specific project activities requiring Commission staff input, including: data collection; the development of a strategic vision, goals, and objectives of the Plan; the analysis of target markets, customers, and equity relative to services; the development of an operations plan; and the development of an operations plan.

### **Task 2 - Data and Information Collection**

The Berkley Group will collect all data and information required to develop the update of the CAPSP, as specifically required by DRPT's *Commuter Assistance Program Strategic Plan - Requirements and Guidance* document and Commission staff. At a minimum, data and information to be collected will include:

- Demographic information regarding RRRRC Commuter Services' service area including population, household, employment trends, employer and workforce characteristic, travel patterns of residents and workers with regard to location of primary and secondary jobs, to enable development of strategies for engaging target audiences over the short, medium and long-term;
- Transportation services and facilities within the region, including transit, rail, park and ride lots and other commuter assistance supports;
- Information and input pertaining to the vision, goals, objectives, and performance measurement of CAP services provided by the Commission;
- Data and information to inform an analysis of target markets and customers for CAP services and to address equity in the planning and provision of CAP services;
- Information and input pertaining to CAP services' operations, including services to be provided, staffing needs, technological, systems, and tool needs, and opportunities for partnerships in the planning, marketing, and delivery of CAP services; and
- Information and input necessary to develop a financial plan for CAP services, including operating and capital expenses, revenues, and forecasts associated with "baseline" current level of service and committed service changes.

Data and information collected will be summarized in memoranda or otherwise made available in a format suitable for use in development of the updated CAPSP, including as appendices to the Plan.

### **Task 3 - Plan Development**

The Berkley Group will develop the CAPSP in coordination with Commission staff. Principally, the Berkley Group will be responsible for the development of Sections 2 thru 6 of the CAPSP as outlined by DRPT's *Commuter Assistance Program Strategic Plan - Requirements and Guidance* document. The Berkley Group will prepare draft versions of sections for review by the Commission's staff and other identified stakeholders. The Berkley Group will incorporate revisions requested through up to two (2) review/revision periods. The Berkley Group will prepare a final version of the CAPSP, incorporating sections prepared by Commission staff.

### **ASSUMPTIONS**

1. **Initiation:** The Commission will identify and provide relevant supporting documents and data resources to be used in the development of the CAPSP.
2. **Contact Person:** The Commission will provide a single staff contact that will be responsible for coordinating meetings, identifying and contacting stakeholders, and collecting and transmitting data, resources, and other related information to the Berkley Group.
3. **Remote Work:** The Berkley Group anticipates that all work performed by its staff to execute the Scope of Work, including meetings, will be performed remotely.
4. **Covid-19 Policy:** Berkley Group staff will adhere to all public health best practices as recommended by the Center for Disease Control (CDC) or state/local regulations, whichever is more stringent.

### **SCHEDULE**

Pursuant to an estimated project timeline provided by the Commission, the Berkley Group anticipates completion of Task 2 and Task 3 activities pertaining to Sections 2 and 3 of the CAPSP by May 1, 2023, completion of Task 2 and Task 3 activities pertaining to Sections 4, 5, and 6 by July 31, 2023, and completion of the full plan by October 31, 2023.

### **FEE**

The lump sum fee for services to be provided and tasks to be completed under the Scope of Work is \$35,000. The fees per task are as follows:

Task	Description	Fee
1	Project Management & Coordination	\$6,000
2	Data and Information Collection	\$16,000
3	Development of Public Engagement/Education Plan	\$13,000
<b>TOTAL</b>		<b>\$35,000</b>