

**SCHEDULE A**  
**SCOPE OF SERVICES**

**Overview**

The Firm shall develop a Human Services Transportation Coordination Plan (“The Plan”) meeting the “unified comprehensive strategy for public transportation service delivery requirements as articulated by the Federal Transit Administration. In addition, the Plan shall provide a “blueprint” for implementing a range of strategies to advance local coordination efforts to improve all transportation services. Stakeholder and public outreach will be a significant element of the planning process, which will be obtained through a provider survey, focus group meetings, stakeholder interviews, and a public meeting.

UCTC envisions the Plan will include, but is not limited to, the following:

- Conduct Literature Search and Review Best Practices
- Update Demographic Profile and Job and Services Locations
- Document Existing Transportation Service Providers
- Conduct Outreach
- Assess needs with a focus on gaps and potential for coordination
- Identification of emerging national or state trends or precedents that may affect human service transportation costs and levels of effectiveness into the future
- Develop Coordination Strategies
- Analyze funding resources
- Identify and Prioritize Solutions
- Ensure an informed and involved public throughout the update process through a variety of outreach mediums and mechanisms; and

The Firm’s work shall be completed in accordance with the following Tasks:

**PROPOSED PLAN**

The following is an overview of the task structure for the Plan:

Plan Coordination

- Task 1 – Project Initiation
- Task 2 – Public Outreach
- Task 3 – Assess Available Service and Conditions
- Task 4 – Assessment of Needs
- Task 5 – Funding Analysis
- Task 6 – Coordination Strategies Financial Plan – Fiscal Constraint
- Task 7 – Draft and Final Plan

**Plan Coordination**

***Project Management & the Firm***

The Firm’s Team shall be led Patricia Monahan, who shall be responsible for coordinating all team work efforts as well as interaction with the Technical Advisory Committee (TAC) and participate in public involvement/outreach efforts. The lead responsibility for the public outreach portion of the Plan will be implemented by Susan G. Blickstein AICP/PP, PhD.

***Plan Coordination with Ulster County Transportation Council (UCTC) and the Technical Advisory Committee (TAC)***

The County’s Project Manager (PM) is Dennis Doyle, Director of Planning or his designee. The PM shall approve project deliverables and their distribution to the TAC, approve scheduling of project events, handle any media

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inquiries, grant initial approval of all invoices, and perform general project administration efforts. The PM shall also be responsible for final acceptance of project deliverables.

The PM shall assemble a TAC to provide guidance and direction to the Firm's work efforts. The TAC shall provide guidance throughout the project, monitor the Firm's activities and performance, and help reach a consensus on the final Plan. The TAC shall include the following types of agencies/organizations: transit agencies (e.g. Kingston Citibus, UCAT), private and non-profit providers (e.g. Gateway Industries, The ARC of Ulster Greene), human service providers (e.g. County departments for aging, social services, veterans services, mental health, employment training), NYSDOT, and others as deemed appropriate.

***Project Management Meetings***

Full team meetings with key staff from the Firm and the TAC are proposed at roughly three-month intervals, starting with a kick-off meeting and following in the third, sixth, ninth and eleventh months of the project. These meetings will be strategically scheduled to develop a framework for decision-making, review public outreach programs, and review elements of the plan.

Prior to the kick-off meeting, the Firm shall coordinate with the PM to develop an overall project approach and work plan; refine project schedule and deliverables; develop an initial framework for decision making and priority setting, identify and determine stakeholders; formulate a preliminary public outreach strategy and plan. The kick-off meeting will include a flow chart of project tasks, key players and responsibilities, schedule, deliverables, milestones, etc.

The kick-off meeting will be used to discuss the above matters with the TAC and accomplish any other important activities related to the successful launch of the project that may arise or be suggested by the TAC prior to the meeting.

***Project Team Communication***

The Firm shall initiate a proactive status reporting throughout the period of performance. This will include providing monthly progress reports with invoices to the PM every four (4) weeks. Each progress report will include an itemized statement of progress on work performed during the previous period, work expected to be completed in the upcoming period, and a statement as to whether the project is on schedule and within budget.

In addition to formal project-related communication, the Firm shall maintain close contact with the PM and the TAC through conference calls every two (2) weeks. In addition, as requested by the PM, the Firm shall initiate short, weekly calls with the PM and UCTC staff to maintain effective work progress. TAC members may be invited to join the weekly calls.

**Task List**

**TASK 1: Project Initiation – Public Outreach**

Task 1 involves initial conversations with UCTC project staff to prepare the project initiation, and the Kick-Off Meeting with the TAC. During this initial task, the scope of work will be reviewed and discussed as well as project expectations and schedule. Any suggested changes to the work scope and schedule based on comment and input from the TAC will be noted and suggested changes will be discussed with UCTC Staff for implementation.

***1.1 Hold the Kick-Off Meeting (TAC Meeting #1)***

The Firm shall bring together project staff and key members of the consulting team for a Project Kick-off Meeting that includes the TAC. The meeting will be held within four (4) weeks of receiving a fully executed Agreement unless otherwise agreed to by the PM. Prior to the meeting the Firm will provide a proposed agenda, any likely data requests, and a list of key questions for the TAC including suggested site visits. The following items will be included in the Kick-Off Meeting and responded to by the Firm:

- Review project objectives, priorities, and deliverables
- Provide details of the proposed work plan and project schedule, and refine (as required)

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- Finalize data requirements, establish appropriate data sources and responsibilities (as applicable)
- Discuss and agree as to how the Firm, UCTC and the TAC will work together to accomplish each task
- Collect relevant studies, plans, and reports (as needed)
- General Discussion with members of the TAC on what their expectations are for the project, identification of any additional members or stakeholders, their impression of needs, known gaps, or other areas of concern.
- Establish all necessary contact information and communication protocols
- Establish preliminary scheduling the meetings and conference calls
- Planning for and convening the next TAC meetings

**Deliverables:** Key questions for TAC, Suggested Work Scope Changes, Data requests, Schedule, and Meeting Minutes

**Meetings:** Kick-off Meeting (TAC Meeting #1)

**TASK 2: Community Outreach**

Task 2 includes a wide-reaching community outreach that is a critical part of developing any human services transportation plan. A particular focus of this effort is directed at understanding the services currently provided both individually and as a whole throughout the county and to obtain firsthand knowledge of the barriers and opportunities for more effective service.

The Firm shall conduct a public involvement process that includes the following:

- Three (3) focus group meetings bringing together staff and clients of each of the target population groups: older adults, people with disabilities, and people with low income, as well as veterans, people with mental illness, homeless individuals, and employment entities.
- Up to five (5) in-person interviews with staff from area transit agencies, human service organizations, and private/non-profit organizations to gain a more detailed understanding about available services and client needs. These may be conducted in groups as needed and available.
- Review and analysis of a survey to area agencies/organizations to be implemented by UCTC staff including assistance in developing the survey material,
- One (1) public meeting, advertised widely, to allow members of the public and the stakeholder group to weigh in on the proposed coordination strategies.

The Firm shall coordinate with UCTC on each public involvement task and provide a draft of program material and collateral for each outreach activity, including meeting agendas and presentations.

UCTC shall assist in facilitating, convening, and advertising meetings through the project website and Facebook page. The Firm shall provide the content to be posted on the webpage and Facebook page. Materials to be developed by the Firm shall include a project fact sheet, meeting information, and additional information necessary to adequately inform the public as to the progress of the project and key findings or events.

**2.1 Public Involvement and Outreach**

The following sections provide an overview of the components of the required public involvement and outreach efforts, as well as the timing associated with each component as it relates to the Tasks included in this scope.

**Survey to Transportation Providers (see also Task 3.2)**

The Firm shall review the survey developed by UCTC staff designed to gather information from transportation providers that serve Ulster County and which will inform and update the provider inventory in the Plan. After UCTC receives the survey results, the Firm shall analyze and summarize the data for inclusion in the Plan. See Task 3.2 for additional information about the transportation provider survey.

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**Focus Groups (see also Task 4.1)**

The Firm shall convene up to four (4) focus groups as part of Task 4.1 that will contain up to ten (10) human service organization staff and clients. The specific groups to be invited to participate will be determined with input from UCTC and the TAC, but it is expected the list will include the target populations of older adults, people with disabilities, veterans, and workers in lower-wage jobs, and individuals who are participating in training or work readiness programs or seeking employment. It will also be important to speak with members of the target populations in different parts of the county because those who live in, or near, Kingston will have more travel options available to them than those who live in the more rural or suburban areas.

Focus groups will be utilized to provide critical input from representatives from clients, area employers, human service providers, and job training and job readiness professionals. The Firm shall identify the key input needed from the focus groups and develop an outline with questions for a facilitated discussion with the groups. This focus group guide will be flexible enough to allow for organic conversation, but will provide sufficient guidance and direction for the facilitators to ensure that input from the various focus groups are comparable. The focus group meetings will be guided by the need to gather information on overall service so as to highlight transportation gaps, needs and opportunities that each of the populations groups experiences.

Focus groups will be asked to assist in identifying spatial and temporal gaps in service, as well as limitations based on rider eligibility. Meetings of the focus groups will take place in convenient locations near transit services. The results of the Focus Groups will be utilized in the assessment of needs required in Task 4.

UCTC staff shall organize and coordinate the focus group meeting location(s) and invite attendees. The focus groups will take place at transit-accessible, free-to-enter locations identified by the TAC, such as local public meeting spaces.

A detailed discussion guide and note-taking template will be developed to support efficient focus group discussions and usable meeting notes that are easily integrated into the technical memorandum. These resource guides will be provided to UCTC and the TAC for review two weeks prior to the focus group meetings.

**Stakeholder Interviews (see also Task 4.2)**

The Firm shall schedule and complete up to ten (10) stakeholder interviews as part of Task 4.2 to gather more in-depth information from select individuals from area agencies and organizations. These stakeholder interviews will be carefully targeted to ensure input from all perspectives in order to have a comprehensive understanding of transportation available and any gaps and needs for the County. These interviews will take place in-person unless it is more convenient for the interviewees to hold a phone conversation. See Task 4.2 for additional information about the stakeholder interviews. Again, the Firm shall develop all discussion guides and note-taking templates to support efficient stakeholder interviews and usable meeting notes that are easily integrated with other project research. The Firm shall provide these discussion guides to UCTC and the TAC for review at least two weeks prior to the stakeholder interviews.

**Public Meeting (see also Task 6.3)**

The Firm shall work closely with UCTC staff to invite members of the public, especially individuals from each of the target groups mentioned above, the Firm will plan one (1) public meeting, which will occur after the draft coordination strategies have been developed. The public meeting will present the draft coordination strategies to members of the public and focus on how the changes will affect service so as to gain perspective and input on the impact of changes. The results of the public meeting are intended to help the UCTC, the TAC, and the Firm with prioritizing the strategies.

The Firm shall work with UCTC to advertise the meeting as widely as possible, including through the webpage and Facebook page, and through direct mailings and emails to agencies and organizational clients.

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**2.2 Develop Content for Project Website and Social Media**

Also as part of this task, the Firm shall provide content for posting on the UCTC's web and Facebook pages. UCTC staff will be responsible for setting up the project website and Facebook page. UCTC staff members will assist in facilitating, convening, and advertising meetings through the project website and Facebook page. The Firm shall provide content to be posted on the webpage and Facebook page, which will include a project fact sheet, meeting information, and additional resources. The project website will have a feature that allows the public to leave comments. The Firm shall respond to the comments in a timely fashion.

**Deliverables:** Analysis of results of survey, notes and analysis of focus group and stakeholder interviews, materials for public meeting content, summary of comments at public meeting, materials for project webpage and Facebook page,

**Meetings:** Public Meeting after completion of draft plan

**Task 3 Assess Available Services and Conditions**

Task 3 will develop a foundation for the analysis of needs (Task 4) using data on the demographic and economic characteristics and the available transportation services for the target populations within Ulster County. The Firm shall also conduct a review of recent coordination plans from around the State for this task.

**3.1 Develop Demographic and Economic Profile of Ulster County**

The Firm shall prepare a demographic profile of Ulster County utilizing applicable up-to-date US Census Bureau data, as well as other state, county, and town-based demographic information to document the number and location of older adults, people with disabilities, households without vehicle access, and people with limited incomes, as well as other analyses that may be of interest to the TAC, such as the location of the Limited English Proficiency (LEP) population in the county. The Firm shall also utilize the rates of unemployment and the location and size of major employers in the County available through the Department of Labor. Major destinations in the County, such as shopping centers, hospitals, schools, medical services, community centers and senior centers, will also be identified.

The demographic and economic analysis will be supplemented by the use of GIS maps that illustrate where concentrations or clusters of these target groups live, work and play. These maps will show where high needs populations live and desire to travel for medical, employment, and personal needs. The Firm shall collect and organize the demographic and economic data elements described above or others that are available that can address the question of needed services. For the most part this data will be summarized using maps and charts in a format approved by UCTC.

**3.2 Document Existing Transportation Resources**

The Firm shall document the existing public and human service transportation providers currently operating including their routes, service clientele, ability to provide service to others along their routes, etc. UCTC staff will assist in this documentation part of which will be information collected through the Transportation Provider Survey and the focus and stakeholder groups. All transportation services available in the county will be included in this documentation, including public fixed route, paratransit, human service transportation, taxicab and on-demand services, private providers, and volunteer driver programs.

As described in Task 2, The Firm shall review and suggest changes to UCTC's provider survey to ensure that all necessary data is collected. The Firm anticipates that the survey will include questions on the services that are available. There will be questions specific to rider eligibility, what type(s) of transportation services are delivered, eligible trip purposes, service area, service days and hours, how they are delivered (in-house vs. contracted), fleet size, contractor rates (as appropriate), annual ridership and other service statistics, operating costs, and sources and amounts of funding. The Firm shall assist UCTC in the implementation and distribution of the survey, as needed. It is anticipated that UCTC will use an online survey program such as Survey Monkey to collect this information in a standard format allowing for quick data cleaning, organization, and analysis. If requested the Firm shall set up the survey on Survey Monkey using the Firm's professional license.

Once the survey has been administered, in order to ensure a complete response the Firm shall use mailings or telephone follow-ups (up to three follow-up contacts) to fill any missing data. This will also ensure a complete set of questionnaire responses and that better understanding of the responses. The Firm shall record and tabulate survey responses as they are received.)

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The end result of this process will be an inventory of all the transportation services provided in Ulster County, relevant information for each provider and mapping of routes and destinations.

**3.3 *Develop Literature Review and Best Practices Summary***

The Firm shall document innovative coordination strategies in recent local and regional plans throughout New York State through a literature review starting with the locally developed coordination plans that have been updated since 2011. The Firm shall review the Human Services Transportation Coordinated Plans for counties that were updated since the enactment of MAP-21 to identify the innovative strategies and funding mechanisms that these counties have employed. Additionally, the Firm shall review regional reports from the regional MPOs.

The Firm shall summarize and include the best practices found in the local and regional plans in the Plan as examples of potential coordination strategies and effective practices.

**3.4 *Prepare Technical Memorandum #1***

At the conclusion of Task 3, the Firm shall prepare a technical memorandum to document research and findings. The technical memo will include the following:

- demographic profile of the county including trend summary ;
- major economic and service destinations with appropriate maps and charts;
- a detailed inventory and summary of each available transportation provider;
- a summary of the state and region's most recent coordination plans and best practices;
- a summary of findings, such as noteworthy demographic trends, strengths and challenges of the transportation network, and the most noteworthy and applicable coordination strategies found in the literature review; and
- appropriate maps, charts.

The FIRM shall provide the technical memo to UCTC for initial review. The Firm shall make one set of revisions based on UCTC's feedback. The Firm shall also make the technical memo available to the TAC for comments and shall make another set of revisions based on the TAC's feedback. The Firm shall provide the technical memorandum in both paper form (color and unbounded) and as an electronic file in both PDF and original format.

**3.5 *Meet with the TAC to Present Findings (TAC Meeting #2)***

The Firm shall present and discuss the Task 3 findings and the Technical Memo as part of the second TAC meeting. Comments from the TAC shall be incorporated into the final version of Tech Memo #1 by the Firm.

The Firm shall with assistance from UCTC to send out the meeting invitation and agenda, the drafts of the technical memo. Following the meeting, a final version of Technical Memo one will be provided by the Firm.

**Deliverables:** Tech Memo #1 as detailed in Task 3.4; meeting agendas, presentation, other materials, and minutes

**Meetings:** TAC Meeting #2

**Task 4 *Assessment of Needs***

Task 4 builds on the outreach to members of the target populations, stakeholders, and the general public to learn about existing transportation services and unmet mobility needs from their perspectives conducted in Task 2. The Firm shall combine the information from Task 2 with the analysis of data collected in Task 3 to identify service gaps and overlaps. The Firm shall develop a concise summary of the findings on available transportation services as related to needs expressed by stakeholder, focus groups, and the public. The Firm shall document unmet needs and shall develop potential strategies/solutions that address service gaps.

**4.1 *Review Assessment of Needs with Focus Groups***

With the assistance of UCTC, the Firm shall seek comments on the findings and needs assessments from the Focus Groups utilized in Task 2 regarding the overall assessment of needs. The Firm shall provide the assessment of needs to the Groups and working with the TAC to respond to comments and concerns in revising the assessment of needs.

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**4.2 Review of Assessment of Needs with Stakeholders**

With the assistance of UCTC, the Firm shall use the notes from the stakeholder interviews conducted as part of Task 2 to seek comments from those stakeholders that provided critical input of the assessment of needs prior to finalization of this Task.

**4.3 Document Service Gaps and Overlaps**

Utilizing the final input from the Focus Groups and stakeholder interviews as well as the information collected in Task 3, the Firm shall identify service gaps and overlaps, which are essential to developing coordination strategies that can achieve efficiencies and address more mobility needs.

To illustrate spatial service gaps, the Firm shall provide mapping and scheduling concerning current transportation services, both fixed-route bus and community transportation service prepared in Task 3 to illustrate the locations of the concentrations of target populations and important destinations.

Other types of gaps such as customer eligibility, trip purpose or destination limitations, and level of service constraints shall also be illustrated by the Firm in this way.

**4.4 Prepare Technical Memorandum #2**

The findings from Task 4 shall be compiled by the Firm in a technical memorandum that will present the team's assessment of existing human service transportation gaps and overlaps by county based on our analysis of the size and location of the target populations, travel patterns, and existing services in each. The results of the Focus Groups and stakeholder interviews shall be utilized by the Firm to provide the needed additional level of detail about how well existing services are utilized and their ability to address mobility needs in each area, from the perspective of those who use or operate them. The comments from focus group participants, which are likely to be qualitative and anecdotal, shall be used by the Firm to confirm the analysis, and provide a more personal perspective on service gaps and needs.

These findings shall be used by the Firm to highlight preliminary recommendations for coordination strategies that have potential for increasing efficiencies in the delivery of service and/or improving mobility options in the region.

The Firm shall submit the technical memo to UCTC for initial review, prior to releasing it to the TAC. After making one set of revisions based on UCTC feedback, the Firm shall send out the technical memo to the TAC, and shall make another set of revisions based on TAC feedback. The Firm shall provide the technical memorandum in both paper form (color and unbounded) and as an electronic PDF file and in original digital format.

**4.5 Meet with the TAC to Present the Needs Assessment (TAC Meeting #3)**

TAC meeting #3, will be used to present and discuss the Task 4 findings on transportation needs for the target populations. UCTC staff will organize and coordinate the meeting location and invite attendees. The Firm shall prepare a presentation summarizing its collection and analysis of data, the results of the outreach efforts, and facilitate a discussion with the TAC about the unmet mobility needs throughout the region. Comments from the TAC shall be incorporated by the Firm into the final versions of Tech Memo #2.

The Firm shall assist UCTC with sending out the meeting invitation, agenda, and the drafts of the technical memos.

Following the meeting, the Firm shall produce a final version of the Tech Memo #2.

Deliverables: Technical Memo #2; GIS mapping data, meeting agendas, materials, and minutes

Meetings: TAC Meeting #3; Follow –up with Focus Groups Stakeholders as needed

**Task 5 Funding Analysis**

Task 5 will identify current federal funding sources utilized in the State of New York, as well as national best practices in obtaining adequate transportation funding to implement the elements of the Plan. The Firm shall focus on the MAP-21 legislation which resulted in several major changes to the way that public and human service transportation is funded and any unique funding available to UCTC due to participating agencies of the New York State.

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**Task 5.1**      ***Analysis of Current Transportation Funding***

This analysis will include current funding sources used by the county’s transportation providers, as well as a review of the funding sources identified in the local and regional New York State Human Services Transportation Coordinated Plan (HSTCP) developed within the last five years. The Firm shall collect the data used to write this chapter during the transportation provider survey (as described in Task 3.2) and the literature review (as described in Task 3.3). The Firm shall also provide a discussion, as applicable of national best practices in transportation funding that it is aware of since the implementation of MAP-21.

The analysis will contain an overview of funding available in the county, any obstacles noted for the use of these funds, and a discussion on whether these funds are adequate to provide services. It will also include innovative funding sources found in New York State and around the country.

**Deliverables:**      funding analysis will be presented as part of the Draft Plan in Task 6

**Meetings:**            None

**Task 6**      **Develop Coordination Strategies**

Task 6 will provide basis for the Plan’s strategies for addressing needs including how to close service gaps and eliminate service overlaps. The Firm shall use the information contained in Tech Memos 1 and 2 to develop a set of coordination strategies that will increase mobility for the target populations throughout the county and establish priorities on the order of their implementation.

**6.1**              ***Identify Potential Strategies to Address Service Gaps and Improve Efficiency***

The Firm shall use the work from the preceding tasks, to develop a set of policies and strategies that can be applied throughout the county to eliminate or reduce duplication in services, fill service gaps, and otherwise provide more efficient utilization of transportation services and resources pertinent to the target populations.

Both short-and long-term strategies will be considered. A range of options from relatively simplistic actions to complex implementation strategies, This “coordination continuum” ranges from information sharing to the consolidation of services under a single provider, as described below:

- Networking** – the simplest form of partnerships where participants share a common interest, but with no significant action other than information exchange
- Cooperation** – involves low-level linkages, informal agreements, and some possible resource sharing
- Coordination** – more intense linkages that include resource sharing to pursue common goals
- Collaboration** – the most sophisticated partnership form with strong, formal linkages among partners and complex goals implemented over longer periods of time
- Consolidation** – one organization assumes responsibility for service delivery of other participant organizations

The Firm shall initially develop proposed solutions to cover a very broad spectrum. Included here should be consideration of types of strategies to increase mobility such as carpooling arrangements in retirement communities; volunteer driver programs; flexible voucher programs; travel training classes for fixed-route buses; transit fare subsidies; improved transit customer information content and dissemination; expanded low-floor bus fleets; improved timed transfers between regional and local bus services; shuttles and other hybrid services; subsidized taxi programs; accessible vehicle sharing programs; and paratransit feeder services to fixed bus or rail routes.

For each coordination strategy that offers a realistic potential of addressing some of the shortcomings that the Firm identified in Task 4, the following information will assembled:

- A description of the alternative in sufficient detail in order for all members of the TAC to understand the alternative
- A list of all organizations or entities that would likely participate or benefit from the alternative
- Identification of the benefits to be derived from implementation of the alternative
- An assessment of implementation feasibility
- An estimate of cost or cost savings
- Funding constraints on current funding sources, as well as the potential and limitations on other prospective sources of (as yet untapped) local, private, and non-traditional funding



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The Firm shall present this information in a summary sheet for each potential coordination activity; strategies proposed will be summarized in a series of overall strategy tables.

**6.2 *Meet with TAC and Local Providers to Prioritize Strategies (TAC Meeting #4)***

Once the Firm has identified promising coordination strategies, a meeting will be held with the TAC, and staff from organizations, or entities, who would likely participate or benefit from the strategy (such as local providers) to review our preliminary recommendations and select criteria that will be used to evaluate and prioritize the strategies.

This meeting will also be utilized to prioritize the list of coordination strategies. Prioritization will be based on the following criteria, and/or other criteria recommended by the TAC:

- Improvement in level of service available
- Improvement in quality of service available
- Stakeholder and public feedback on the criticality of need
- Estimated costs, including ongoing operational costs, and availability of funding
- Implementation feasibility, timing, and timeline
- Value to economic and regional development
- Potential to increase efficiency and coordination among service providers
- Stakeholder support and availability of lead agencies
- Potential for savings in unit costs (cost/trip, cost/hour) (if applicable)

Adjustments to the list of proposed strategies will be made, as needed, before presenting the information during public meeting.

**6.3 *Hold the Public Meeting (and TAC Meeting #5)***

Once the final list of potential strategies has been developed, the Firm shall present the findings to members of the public and the stakeholders at the public meeting. The meeting will be structured to obtain input on services and transportation needs, potential strategies to address service gaps, and priorities for future funding and implementation of transportation projects.

UCTC staff shall assist the Firm to identify the meeting location and organize and advertize the meeting to members of the public and area agencies and organizations. The Firm shall provide material to promote the public meeting. UCTC staff and the TAC members shall be responsible to promote the project meeting on websites and Facebook pages, email blasts, and through flyers distributed onboard Kingston Citibus, Ulster County Area Transit (UCAT) buses and local print media.

As deemed appropriate, the public meeting will be co-located with another planned event that would gather additional attendees, such as a senior event.

The Firm shall provide drafts of the presentation, meeting agendas, and materials to the UCTC program manager for review two weeks prior to the public meeting.

During the public meeting, the public will be asked to comment on the components of the Plan and provide specific input on the coordination strategies

The results of the public meeting will utilize to confirm the priority strategies that will be presented in the Tech Memo #3.

**6.4 *Prepare Technical Memorandum #3***

The Firm shall prepare Technical Memorandum #3 that summarizes the process and the results of identifying, evaluating, and ranking possible coordination strategies throughout the county. Summary sheets for the priority strategies chosen and confirmed during the public meeting and the subsequent TAC meeting will be noted as recommended strategies. The full list of considered strategies, as well as the summary sheets of coordination strategies that were not prioritized will be documented in a separate appendix of the Plan.

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The Firm shall submit the technical memo to UCTC for initial review prior to releasing it to the TAC. After making one set of revisions based on UCTC feedback, the Firm shall send out the technical memo to the TAC, and shall make another set of revisions based on TAC feedback. The technical memorandum will be provided both in paper form (color and unbounded) and as an electronic PDF file and in original digital format.

**Deliverables:** Technical Memo #3; meeting agendas, materials, and minutes  
**Meetings:** Meeting with the TAC and Providers (TAC Meeting #4); Public Meeting

**Task 7 Develop Draft and Final Human Services Transportation Coordinated Plan (HSTCP)**

**7.1 Prepare Draft Final HSTCP**

The Firm shall compile a draft final report that describes all elements of the planning process and includes all of the technical memos from previous tasks. Appendices containing survey questionnaires, interview guides, TAC membership, meeting summaries, and other materials to document the planning process will also be part of the report. The draft HSTCP will be provided both in paper form (color and unbounded) and as an electronic PDF file and in original digital format. The Firm shall submit the draft HSTCP to UCTC for initial review prior to releasing it to the TAC. After making one set of revisions based on UCTC feedback, the shall send out the draft HSTCP to the TAC and shall make another set of revisions based on TAC feedback. At this point the final HSTCP report will be sent back to UCTC for the final review and changes. After making these final changes, the final HSTCP will be sent to the TAC.

**7.2 Present Draft Final HSTCP (TAC Meeting #6)**

The Firm shall prepare and present the Draft Final HSTCP to the TAC and the UCTC at the public meeting of the UCTC. Absent substantive comments from the TAC or the UCTC the Draft Final HSTCP will become Final and as needed adopted by the UCTC. The presentation shall a summary of the planning process and the findings of each step. Handouts, printed in color that highlight significant elements of the Draft Final HSTCP, such as service gaps, comments from the public outreach activities, and prioritized lists of strategies.

**Deliverables:** Draft Final and Final HSTCP Plans; meeting agendas, materials (including final report PowerPoint and handouts), and meeting minutes. Twelve full color bound copies of the final plan will be provided.  
**Meetings:** Presentation of Final HSTCP Plan to TAC and UCTC (TAC Meeting #6)

**General Note on Deliverables**

The Firm shall submit technical memoranda and reports in draft form (as two (2) unbound, reproducible color copies and one electronic copy both in native and PDF), revise them based on the UCTC and TAC comments, and submit final memoranda and reports. The Firm shall also provide raw data files for graphics and provide clear indication of the location of data underlying any graphics. Any GIS datasets, if used, will be submitted. At the close out of the project a CD or USB Flash Drive will be submitted indexed as directed by the PM that includes all of reports, photographs, graphics, and other material utilized during the project.

