

ATTACHMENT A

Scope of Work

I. PROPOSED PROJECT

- A. The Transportation Agency for Monterey County (“TAMC”) is developing a traveler information and travel demand management program for Monterey County to address commuter, school and visitor traffic in Monterey County.
- B. A soft launch of the TAMC traveler information and travel demand management program is targeted for fall 2017 with a full launch of the program in spring 2018.
- C. The program consists of the following elements:
 - 1. Traveler information website (511monterey.org) – dynamic road conditions map, travel resources, link to Mobility Management platform, roadway construction info, Safe Routes to School resources
 - 2. Mobility Management Software & App – multimodal trip matching, trip planning, trip logging, vanpool management, incentives management, emergency ride home management event parking, bike parking, EV charging locations, surveys, data reports
 - 3. Emergency Ride Home Program
 - 4. Incentives & rewards
 - 5. Commuter Challenge and Bike Month campaigns
 - 6. Community outreach – employers, schools, government, universities and visitor-serving industry
 - 7. Travel Demand Management policy information and resources
- D. TAMC is looking to invest in a comprehensive and user-friendly travel demand management software platform and mobile app for use in Monterey County. The software is intended to integrate or support all of the aforementioned elements of the program.

II. TAMC PROVIDED ITEMS AND SERVICES

- A. TAMC shall provide the selected Consultant with:
 - 1. Available local data/information such as (but not limited to):
 - a. Transit stops, stations and service
 - b. Vanpools
 - c. Electric vehicle parking
 - d. Bike parking
 - e. Park & ride lots (public & private)
 - f. Schools & Universities
 - g. Event parking
 - 2. Program information
 - 3. Custom logos and graphics
 - 4. Timely review of submittals

III. ITEMS AND SERVICES TO BE PROVIDED BY CONSULTANT

- A. Consultant shall furnish travel demand management software services, including:
1. Customization of travel demand management software platform and mobile app that supports the TAMC 511 traveler information & travel demand management program
 2. Software hosting services
 3. Staff orientation and training
 4. Troubleshooting and maintenance

IV. EXPECTED TASKS

- A. Travel Demand Management Software Services may include but are not limited to:

1. Design & Development:

- a) **Kick-Off Meeting:** TAMC will arrange a kick-off meeting with Consultant, TAMC staff and key stakeholders to identify data collection needs
- b) **Branding & Integration:** Work with TAMC staff to make sure the platform functions are branded appropriately and integrate with the TAMC website
- c) **Interface & Integration:** provide a platform that is completely responsive and user-friendly on all mobile devices and integrates with social media and popular ridesharing and transportation-related mobile apps. Platform tools should be accessible using the most popular current browsers.
- d) **Trip Matching Tool:** work with TAMC staff and key stakeholders to customize the trip matching tool interface to include locally relevant and available information. The tool should ideally do the following:
 - Carpool matching along a corridor between origin, destination or midpoint or within a set distance from each end of the trip
 - Ability to modify parameters (i.e. miles, times, start/mid/end point, set contact preference to email or phone and select confidentiality parameters
 - Ability to select a park and ride lot, employer work site or a community landmark/facility as a commute point
 - Vanpool coordination features that enable vanpool coordinators to manager their vanpools online, indicating when empty seats are available, monthly fees, pick-up locations and times
 - Enable ride matching within the portal group or within larger groups of registered users
 - Casual Carpool functions
 - Transit route planning using Google Transit or proprietary system
 - Bike commuter matching
 - School pool matching

- Ability for individual users to “opt out” of the commuter matching portion of the system yet still remain active with the commute calendar
 - Generate maps that show:
 - Commuter match list result locations
 - Commute trip route and meeting place(s)
 - Park and ride locations (formal and informal) and possibility to add transit routes, bike paths, electric vehicle charging locations and bike share locations
 - e) **Mobile App:** provide a mobile app that will track and log trips.
 - f) **Administrative functions:** set-up administrative functions to allow the following:
 - Develop and manage networks within the platform
 - Assign network administrative privileges
 - Generate reports
 - trips, miles, calories and air pollution emissions reduction information from user commute data by user, employer, mode or region
 - User website visits
 - User registrations
 - Employer/Network activity
 - Access GIS data
 - Anonymous route information by mode
 - Generate and distribute user surveys
 - Manage vanpools
 - Manage user profiles
 - Manage incentives/rewards
 - Manage Emergency Ride Home reimbursement requests and payments
2. **Orientation & Training:**
- g) Hold and video record training for TAMC staff and key network administrative staff. Provide TAMC staff a copy of the video.
 - h) Develop an orientation video for new users
 - i) Provide training opportunities when platform features are introduced or updated
3. **Hosting & Maintenance:**
- a) Host proprietary software on Consultant’s servers
 - b) Provide regular maintenance and troubleshooting service
 - c) Provide notice to TAMC if/when servers will be down for more than a few hours