

**PROFESSIONAL SERVICES AGREEMENT FOR COMPREHENSIVE OPERATIONAL ANALYSIS**

THIS PROFESSIONAL SERVICES AGREEMENT FOR COMPREHENSIVE OPERATIONAL ANALYSIS ("Agreement") is entered into by and between the **CITY OF OCALA**, a Florida municipal corporation ("City"), and **HDR ENGINEERING, INC.**, a foreign for-profit corporation duly organized in the state of Delaware and authorized to do business in the state of Florida (EIN# 14-0680568) ("Consultant").

**RECITALS:**

**WHEREAS**, on January 20, 2026, City issued a Request for Proposal ("RFP") for the procurement of professional services from a qualified firm to perform a Comprehensive Operational Analysis (COA) of the SunTran transit system, RFP No.: SUN/260384 (the "Solicitation"); and

**WHEREAS**, HDR Engineering, Inc. submitted a proposal, and was ranked highest by a City evaluation committee; and

**WHEREAS**, the City desires to contract with HDR Engineering, Inc. for professional services related to a Comprehensive Operational Analysis of SunTran upon the terms and conditions set forth herein, and HDR Engineering, Inc. desires to perform such services upon said terms and conditions and based upon its proposal attached hereto as **Exhibit C – Consultant Proposal**; and

**NOW THEREFORE**, in consideration of the foregoing recitals, the following mutual covenants and conditions, and other good and valuable consideration, City and Consultant agree as follows:

**TERMS OF AGREEMENT:**

1. **RECITALS.** City and Consultant hereby represent, warrant, and agree that the Recitals set forth above are true and correct and are incorporated herein by reference.
2. **CONTRACT DOCUMENTS.** The documents comprising the entire understanding between City and Consultant shall include only: (a) this Agreement; (b) those documents listed in this section as Exhibits to this Agreement; (c) the City's Solicitation for the Project and the proposal submitted by Consultant in response thereto (the "Solicitation Documents"); (d) those documents identified in the Project Specifications section of this Agreement, if any; and (e) the task work orders issued for individual projects pursuant to this Agreement (collectively the "Contract Documents"). The Contract Documents are incorporated herein by reference for all purposes. Any conflict between the terms of this Agreement and the Contract Documents shall be construed in favor of this Agreement and the terms of this Agreement shall control, amend, and supersede any conflicting terms contained in the remaining Contract Documents.
  - A. **Exhibits to Agreement.** The Exhibits to this Agreement are as follows:
    - Exhibit A: Scope of Work (A-1 through A-13)
    - Exhibit B: Federal Clauses (B-16)
    - Exhibit C: Consultant Proposal (C-52)
3. **SCOPE OF SERVICES.** Consultant shall provide all materials, labor, supervision, tools, accessories, equipment necessary for Consultant to perform its obligations under this Agreement as set forth in the attached **Exhibit A - Scope of Work**. The Scope of Work and/or pricing under this Agreement may only be adjusted by written amendment executed by both parties.

- A. Consultant shall perform all services in accordance with the terms and conditions of this Agreement and with any and all applicable regulations and requirements of all interested governmental agencies.
  - B. Consultant shall utilize sufficient qualified personnel acceptable to the City to perform any and all services under this Agreement. Consultant shall promptly remove any person from performing services as the City may request in writing and promptly replace such person with a person who shall be approved in writing by the City. Consultant agrees to include a similar provision in its agreements with any and all subconsultants.
  - C. **Standard of Care.** Consultant shall perform all services in a timely, efficient, and cost-effective manner and in a manner that comports with the standards of professional engineering services ordinarily exercised by reputable members of Consultant's profession. Consultant shall re-perform any services which fail to satisfy the foregoing standard of care at no additional cost to City. Consultant's standard of care shall not be altered by the application, interpretation, or construction of any other provision of this Agreement.
4. **CONTRACT TERM.** The term of this Agreement shall commence and continue in full force for a period of **TWO (2) YEARS** beginning on **MAY 20, 2026** and ending on **MAY 19, 2028** (the "Contract Term").
5. **COMPENSATION.** City shall compensate the Consultant an amount not to exceed **TWO HUNDRED FIFTEEN THOUSAND, NINE HUNDRED NINETY-EIGHT AND NO/100 DOLLARS (\$215,998)** (the "Maximum Limiting Amount") during the Contract Term, inclusive of any and all direct costs, indirect costs, and reimbursable expenses, in accordance with the pricing reflected in **Exhibit C – Consultant Proposal** and the terms of this Agreement. The maximum limiting amount established under this Agreement shall not be exceeded without the City's express written approval verified by amendment or change order to this Agreement.
- A. **Invoice Submission.** All invoices submitted by Contractor shall include the City Contract Number, an assigned Invoice Number, and an Invoice Date. Contractor shall submit the original invoice through the responsible City Project Manager at: **City of Ocala Growth Management Department, SunTran Division, Attn: Tom Duncan, 201 SE 3<sup>rd</sup> Street, Ocala, Florida 34470**, E-Mail: [tduncan@ocalafl.gov](mailto:tduncan@ocalafl.gov).
  - B. Consultant's invoices shall be sufficiently detailed and adequately describe the work accomplished. All invoices, reports, and other documentation submitted by Consultant shall include the City Contract Number, invoice date, and an assigned invoice number. City reserves the right to request additional documentation to support the charges reflected. All completed tasks must be approved and agreed upon by the City Project Manager before payment will be authorized.
- A. **Prompt Payment.** Monthly actual payment reporting requirements for prime consultants and subconsultants are based on prompt payment rules and laws. The same holds true for return of retainage after the subcontractor has completed its work, not when the overall project is finished. Florida law requires timely payment for both construction and non-construction services. Invoices for consultant contracts are payable per the terms of this Agreement but shall not exceed federal regulations as set forth in 49 CFR Part 26, specifically section 26.29, requiring payment of all subcontractors for satisfactory performance within **THIRTY (30) DAYS** of payment to the Prime.

- B. **Excess Funds.** If due to mistake or any other reason Consultant receives payment under this Agreement in excess of what is invoiced and/or provided for under the terms of this Agreement or any related task work order, Consultant shall promptly notify City upon discovery of the receipt of the overpayment. Any overpayment shall be refunded to City within **THIRTY (30) DAYS** of Consultant's receipt of the overpayment or must also include interest calculated from the date of the overpayment at the interest rate for judgment at the highest rate allowed by law.
  - C. **Amounts Due to the City.** Consultant must be current and remain current in all obligations due to the City during the performance of services under this Agreement. Payments to Consultant may be offset by any delinquent amounts due to the City or fees and/or charges owed to the City.
  - D. **Tax Exemption.** City is exempt from all federal excise and state sales taxes (State of Florida Consumer's Certification of Exemption 85-8012621655C-9). The City's Employer Identification Number is 59-60000392. Consultant shall not be exempted from paying sales tax to its suppliers for services or material required to fulfill Consultant's contractual obligations with the City, nor will Consultant be authorized to use City's Tax Exemption Number for securing materials listed herein.
6. **FORCE MAJEURE.** Neither party shall be liable for delay, damage, or failure in the performance of any obligation under this Agreement if such delay, damage, or failure is due to causes beyond its reasonable control, including without limitation: fire, flood, strikes and labor disputes, acts of war, acts of nature, terrorism, civil unrest, acts or delays in acting of the government of the United States or the several states, judicial orders, decrees or restrictions, or any other like reason which is beyond the control of the respective party (each a "Force Majeure" event). The party affected by any event of force majeure shall use reasonable efforts to remedy, remove, or mitigate such event and the effects thereof with all reasonable dispatch.
- A. The party affected by a force majeure event shall provide the other party with full particulars thereof including, but not limited to, the nature, details, and expected duration thereof as soon as it becomes aware.
  - B. When force majeure circumstances arise, the parties shall negotiate in good faith any modifications to the terms of this Agreement and/or any related task work order that may be necessary or appropriate in order to arrive at an equitable solution.
  - C. Consultant performance shall be extended for a number of days equal to the duration of the force majeure event. Consultant shall be entitled to an extension of time only and, in no event, shall Consultant be entitled to any increased costs, additional compensation, or damages of any type resulting from such force majeure delays.
7. **TERMINATION.** This Agreement may be terminated by either party for cause upon City or Consultant providing written notice to the defaulting party not less than **THIRTY (30) DAYS** prior to the date of termination in the manner specified for the giving of Notices herein. Any such termination shall not affect the rights or obligations accruing to either party under any previously issued and approved Task Work Order.
- A. **Consultant's Opportunity to Cure Default.** City may, in its sole discretion, provide Consultant with an opportunity to cure the violations set forth in City's notice of default to Consultant. Consultant shall commence to cure the violations immediately and shall diligently and continuously prosecute such cure to completion within a reasonable time as determined by City. If the violations are not corrected within the time determined to be

reasonable by City or to the reasonable satisfaction of City, City may, without further notice, declare Consultant to be in breach of this Agreement and pursue all remedies available at law or equity, to include termination of this Agreement without further notice.

- B. **City's Remedies Upon Consultant Default.** In the event of Consultant default under this Agreement City shall have the right, at City's option, to pursue any and all remedies available at law or equity, including, without limitation, the right to:

- (1) terminate this Agreement without further notice;
- (2) hire another consultant to complete the required work in accordance with the needs of City;
- (3) recover from Consultant all damages, costs, and attorneys' fees arising from Consultant's default prior to termination; and
- (4) recover from Consultant any actual excess costs by: (i) deduction from any unpaid balances owed to Consultant; or (ii) any other remedy as provided by law.

- C. **Termination for Convenience.** City reserves the right to terminate this Agreement in whole or in part at any time for the convenience of City without penalty or recourse. Upon receipt of the City's Notice of Termination, Consultant shall immediately discontinue all work as directed in the Notice, provide notice to all subconsultants of the effective date of the termination, and minimize all further costs to City including, but not limited to, the placing of any and all orders for materials, facilities, or supplies, in connection with its performance under this Agreement. Consultant shall be entitled to receive compensation solely for: (1) the actual cost of the work completed in conformity with this Agreement; and/or (2) such other costs incurred by Consultant as permitted under this Agreement and approved by City.

- D. **Delivery of Materials Upon Termination.** In the event of termination of this Agreement (or any task work order issued hereunder), for any reason prior to Consultant's satisfactory completion of all services, Consultant agrees to promptly provide to City, at no additional cost or expense, one (1) copy of any and all of the following items which may have been produced or created prior to and including the date of termination to City: data, specifications, calculations, estimates, plans, drawings, construction documents, photographs, summaries, reports, memoranda, and any other information, instrument, or materials (whether or not completed) that were generated or prepared by Consultant in rendering the Services described herein and not previously furnished to City by Consultant pursuant to this Agreement or associated task work order.

8. **PERFORMANCE EVALUATION.** At the end of the contract, City may evaluate Consultant's performance. Any such evaluation will become public record.
9. **CONTRACT FULFILLMENT.** Consultants who enter into any agreement with the City of Ocala and fail to complete the contract term, for any reason, may be subject to future bidding suspension for **ONE (1) YEAR**, and up to a possible **THREE (3) YEAR** bid debarment for serious contract failures.
10. **COMMERCIAL AUTO LIABILITY INSURANCE.** Consultant shall procure, maintain, and keep in full force, effect, and good standing for the life of this Agreement a policy of commercial auto liability insurance with a minimum combined single limit of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage arising out of Consultant's operations and covering all owned, hired, scheduled, and non-owned automobiles utilized in said operations. If

Consultant does not own vehicles, Consultant shall maintain coverage for hired and non-owned automobile liability, which may be satisfied by way of endorsement to Consultant's Commercial General Liability policy or separate Commercial Automobile Liability policy.

11. **COMMERCIAL GENERAL LIABILITY INSURANCE.** Consultant shall procure, maintain, and keep in full force, effect, and good standing for the life of this Agreement a policy of commercial general liability insurance with limits not less than:
  - A. One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for bodily injury, property damage, and personal and advertising injury;
  - B. One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for products and completed operations;
  - C. Policy must include coverage for contractual liability and independent contractors;
  - D. The City, a Florida municipal corporation, and its officials, employees, and volunteers are to be covered as an additional insured with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liabilities arising out of activities performed by or on behalf of Consultant. This coverage shall contain no special limitation on the scope of protection to be afforded to the City, its officials, employees, and volunteers.
12. **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY COVERAGE.** Consultant shall procure, maintain, and keep in full force, effect, and good standing for the life of this Agreement adequate workers' compensation and employer's liability insurance covering all of its employees in at least such amounts as required by Chapter 440, Florida Statutes, and all other state and federal workers' compensation laws, including the U.S. Longshore Harbor Workers' Act and the Jones Act, if applicable. Consultant shall similarly require any and all of its subcontractors to afford such coverage for all of its employees as required by applicable law. Consultant shall waive and shall ensure that Consultant's insurance carrier waives, all subrogation rights against the City of Ocala and its officers, employees, and volunteers for all losses or damages. Consultant's policy shall be endorsed with WC 00 03 13 Waiver of our Right to Recover from Others or its equivalent. **Exceptions and exemptions to this Section may be allowed at the discretion of the City's Risk Manager on a case-by-case basis in accordance with Florida Statutes and shall be evidenced by a separate waiver.**
13. **PROFESSIONAL LIABILITY AND/OR ERRORS AND OMISSIONS INSURANCE COVERAGE.** Consultant shall procure and maintain, for a period of not less than **Five (5) Years** from the date of acceptance of the work by the City, a policy of professional liability/error and omissions insurance in an amount not less than One Million Dollars (\$1,000,000) per claim.
14. **ADDITIONAL INSURANCE REQUIREMENTS.**
  - A. Consultant's insurance coverage shall be primary insurance for all applicable policies. The limits of coverage under each policy maintained by Consultant shall not be interpreted as limiting Consultant's liability or obligations under this Agreement. City does not in any way represent that these types or amounts of insurance are sufficient or adequate enough to protect Consultant's interests or liabilities or to protect Consultant from claims that may arise

out of or result from the negligent acts, errors, or omissions of Consultant, any of its agents or subconsultants, or for anyone whose negligent act(s) Consultant may be liable.

- B. No insurance shall be provided by the City for Consultant under this Agreement and Consultant shall be fully and solely responsible for any costs or expenses incurred as a result of a coverage deductible, co-insurance penalty, or self-insured retention to include any loss not covered because of the operation of such deductible, co-insurance penalty, self-insured retention, or coverage exclusion or limitation.
- C. **Certificates of Insurance.** No work shall be commenced by Consultant under this Agreement until the required Certificate of Insurance and endorsements have been provided nor shall Consultant allow any subcontractor to commence work until all similarly required certificates and endorsements of the subcontractor have also been provided. Work shall not continue after expiration (or cancellation) of the Certificate of Insurance and work shall not resume until a new Certificate of Insurance has been provided. **Consultant shall provide evidence of insurance in the form of a valid Certificate of Insurance (binders are unacceptable) prior to the start of work contemplated under this Agreement to: City of Ocala. Attention: Procurement & Contracting Department, Address: 110 SE Watula Avenue, Third Floor, Ocala Florida 34471, E-Mail: [vendors@ocalafl.gov](mailto:vendors@ocalafl.gov).** Consultant's Certificate of Insurance and required endorsements shall be issued by an agency authorized to do business in the State of Florida with an A.M. Best Rating of A or better. The Certificate of Insurance shall indicate whether coverage is being provided under a claims-made or occurrence form. If any coverage is provided on a claims-made form, the Certificate of Insurance must show a retroactive date, which shall be the effective date of the initial contract or prior.
- D. **City as an Additional Insured.** The City of Ocala shall be named as an Additional Insured and Certificate Holder on all liability policies identified in this Section with the exception of Workers' Compensation, Auto Liability (except when required by Risk Management) and Professional Liability policies. **Workers Compensation policy must contain a Waiver of Subrogation in favor of the City.**
- E. **Notice of Cancellation of Insurance.** Consultant's Certificate of Insurance shall provide **THIRTY (30) DAY** notice of cancellation, **TEN (10) DAY** notice if cancellation is for non-payment of premium. In the event that Consultant's insurer is unable to accommodate the cancellation notice requirement, it shall be the responsibility of Consultant to provide the proper notice. Such notification shall be in writing by registered mail, return receipt requested, and addressed to the certificate holder. Additional copies may be sent to the City of Ocala at [vendors@ocalafl.gov](mailto:vendors@ocalafl.gov).
- F. **Failure to Maintain Coverage.** The insurance policies and coverages set forth above are required and providing proof of and maintaining insurance of the types and with such terms and limits set forth above is a material obligation of Consultant. Consultant's failure to obtain or maintain in full force and effect any insurance coverage required under this Agreement shall constitute material breach of this Agreement.
- G. **Severability of Interests.** Consultant shall arrange for its liability insurance to include or be endorsed to include a severability of interests/cross-liability provision so that the "City of Ocala" (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.

15. **NO EXCLUSIVITY.** It is expressly understood and agreed by the parties that this is not an exclusive agreement. Nothing in this Agreement shall be construed as creating any exclusive arrangement with Consultant or as prohibiting the City from acquiring similar, equal, or like goods and/or services or from executing additional contracts with other entities or sources.
16. **PUBLIC RECORDS.** The Consultant shall comply with all applicable provisions of the Florida Public Records Act, Chapter 119, Florida Statutes. Specifically, the Consultant shall:
- A. Keep and maintain public records required by the public agency to perform the service.
  - B. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
  - C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Consultant does not transfer the records to the public agency.
  - D. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Consultant or keep and maintain public records required by the public agency to perform the service. If the Consultant transfers all public records to the public agency upon completion of the contract, the Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of the contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.
  - E. A consultant who fails to provide public records to City within a reasonable time may be subject to penalties under section 119.10, Florida Statutes.

**IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: CITY OF OCALA, OFFICE OF THE CITY CLERK, 110 SE WATULA AVENUE, OCALA FLORIDA 34471; TELEPHONE: 352-629-8266; E-MAIL: [clerk@ocalafl.gov](mailto:clerk@ocalafl.gov).**

17. **AUDIT.** Consultant agrees to maintain such financial and other records as may be prescribed by the City or by applicable federal and state laws, rules, and regulations. Consultant shall comply and cooperate immediately with any inspections, reviews, investigations, or audits relating to this Agreement as deemed necessary by the Florida Office of the Inspector General, the City's Internal or External auditors or by any other Florida official with proper authority.
18. **PUBLICITY.** Consultant shall not use City's name, logo, seal or other likeness in any press release, marketing materials, or other public announcement without City's prior written approval.

19. **PUBLIC ENTITY CRIMES.** As provided in Section 287.133(2)(a), Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or Consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO, for a period of 36 months from the date of being placed on the convicted vendor list.
20. **DRUG FREE WORKPLACE CERTIFICATION.** If not already completed during the solicitation process, in compliance with section 287.087, Florida Statutes, Consultant shall, prior to the commencement of work under this Agreement, execute the City's Drug Free Workplace Certification and it shall thereafter be deemed to be included as part of this Agreement.
21. **NON-DISCRIMINATORY PRACTICES.** Consultant, for itself, its delegates, successors-in-interest, and assigns, and as part of the consideration hereof, does hereby covenant and agree that in the furnishing of Services to the City under this Agreement, no person shall be excluded from participation in, denied the benefits of, or otherwise subjected to discrimination in regard to this Agreement on the basis of race, color, religion ancestry, national origin, sex, pregnancy, age, disability, sexual orientation, gender identity, marital or domestic partner status, familial status, or veteran status. Consultant further covenants and agrees that it shall comply with all existing requirements concerning discrimination imposed by any and all applicable local, state, and federal rules, regulations, or guidelines and as such rules, regulations, or guidelines may from time to time be amended.
22. **E-VERIFY.** Pursuant to section 448.095, Consultant shall register with and use the U.S. Department of Homeland Security's ("DHS") E-Verify System, accessible at <https://e-verify.uscis.gov/emp>, to verify the work authorization status of all newly hired employees. Consultant shall obtain affidavits from any and all subcontractors in accordance with paragraph 2(b) of section 448.095, Florida Statutes, and maintain copies of such affidavits for the duration of this Agreement. By entering into this Agreement, Consultant certifies and ensures that it utilizes and will continue to utilize the DHS E-Verify System for the duration of this Agreement and any subsequent renewals of same. Consultant understands that failure to comply with the requirements of this section shall result in the termination of this Agreement and Consultant may lose the ability to be awarded a public contract for a minimum of one (1) year after the date on which the Agreement was terminated. Consultant shall provide a copy of its DHS Memorandum of Understanding upon City's request. Please visit [www.e-verify.gov](http://www.e-verify.gov) for more information regarding the E-Verify System.
23. **INDEPENDENT CONTRACTOR STATUS.** City expressly acknowledges Consultant is an independent contractor, and nothing in this Agreement is intended nor shall be construed to create an agency relationship, an employer/employee relationship, a joint venture relationship, or any other relationship allowing the City to exercise control or discretion over the manner or method by which Consultant performs hereunder.
24. **WAIVER.** The failure or delay of any party at any time to require performance by another party of any provision of this Agreement, even if known, shall not affect the right of such party to require performance of that provision or to exercise any right, power or remedy hereunder. Any waiver by any party of any breach of any provision of this Agreement should not be construed

as a waiver of any continuing or succeeding breach of such provision, a waiver of the provision itself, or a waiver of any right, power or remedy under this Agreement. No notice to or demand on any party in any circumstance shall, of itself, entitle such party to any other or further notice or demand in similar or other circumstances.

25. **SEVERABILITY OF ILLEGAL PROVISIONS.** Wherever possible, each provision of this Agreement shall be interpreted in such a manner as to be effective and valid under the applicable law. Should any portion of this Agreement be declared invalid for any reason, such declaration shall have no effect upon the remaining portions of this Agreement.
26. **INDEMNITY.** Consultant shall indemnify City and its elected officials, employees and volunteers against, and hold City and its elected officials, employees and volunteers harmless from damages, claims, losses, costs, and expenses, including attorneys' fees, which City or its elected officials, employees or volunteers may sustain, or which may be asserted against City or its elected officials, employees or volunteers, arising out of negligent errors, acts, or omissions by Consultant and contemplated by this Agreement to the extent allowed by section 725.08, Florida Statutes, and to the extent that the services rendered pursuant to the Agreement were services of a "Design Professional" as defined in section 725.08(4), Florida Statute, including without limitation, harm or personal injury to third persons during the term of this Agreement.
27. **NO WAIVER OF SOVEREIGN IMMUNITY.** Nothing herein is intended to waive sovereign immunity by the City to which sovereign immunity may be applicable, or of any rights or limits of liability existing under Florida Statute § 768.28. This term shall survive the termination of all performance or obligations under this Agreement and shall be fully binding until any proceeding brought under this Agreement is barred by any applicable statute of limitations.
28. **NOTICES.** All notices required or permitted under this Agreement shall be given in writing and shall be deemed sufficiently served if delivered by registered or certified mail, with return receipt requested; or delivered personally; or delivered via electronic mail (as provided below) and followed with delivery of a hard copy. All notices shall be addressed to the respective parties as follows:

If to Consultant:

HDR Engineering, Inc.  
Attention: Brian Waterman, PhD, AICP  
315 E. Robinson Street, Ste. 400  
Orlando, Florida 32801  
Phone: 850-329-1443  
Email: [brian.waterman@hdrinc.com](mailto:brian.waterman@hdrinc.com)

If to City of Ocala:

Daphne M. Robinson, Esq., Contracting Officer  
City of Ocala  
110 SE Watula Avenue, Third Floor  
Ocala, Florida 34471  
Phone: 352-629-8343  
Email: [notices@ocalafl.gov](mailto:notices@ocalafl.gov)

Copy to:

William E. Sexton, Esq., City Attorney  
City of Ocala  
110 SE Watula Avenue, Third Floor  
Ocala, Florida 34471  
Phone: 352-401-3972  
E-mail: [cityattorney@ocalafl.gov](mailto:cityattorney@ocalafl.gov)

29. **ATTORNEYS FEES.** If any civil action, arbitration or other legal proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default or misrepresentation in connection with any provision of this Agreement, the successful or prevailing party shall be entitled to recover reasonable attorneys' fees, sales and use taxes, court costs and all expenses even if not taxable as court costs (including, without limitation, all such fees, taxes, costs and expenses incident to arbitration, appellate, bankruptcy and post-judgment proceedings), incurred in that civil action, arbitration or legal proceeding, in addition to any other relief to which such party or parties may be entitled. Attorneys' fees shall include, without limitation, paralegal fees, investigative fees, administrative costs, sales and use taxes and all other charges billed by the attorney to the prevailing party.
30. **JURY WAIVER.** IN ANY CIVIL ACTION, COUNTERCLAIM, OR PROCEEDING, WHETHER AT LAW OR IN EQUITY, WHICH ARISES OUT OF, CONCERNS, OR RELATES TO THIS AGREEMENT, ANY AND ALL TRANSACTIONS CONTEMPLATED HEREUNDER, THE PERFORMANCE HEREOF, OR THE RELATIONSHIP CREATED HEREBY, WHETHER SOUNDING IN CONTRACT, TORT, STRICT LIABILITY, OR OTHERWISE, TRIAL SHALL BE TO A COURT OF COMPETENT JURISDICTION AND NOT TO A JURY. EACH PARTY HEREBY IRREVOCABLY WAIVES ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY. NEITHER PARTY HAS MADE OR RELIED UPON ANY ORAL REPRESENTATIONS TO OR BY ANY OTHER PARTY REGARDING THE ENFORCEABILITY OF THIS PROVISION. EACH PARTY HAS READ AND UNDERSTANDS THE EFFECT OF THIS JURY WAIVER PROVISION.
31. **GOVERNING LAW.** This Agreement is and shall be deemed to be a contract entered and made pursuant to the laws of the State of Florida and shall in all respects be governed, construed, applied and enforced in accordance with the laws of the State of Florida.
32. **JURISDICTION AND VENUE.** The parties acknowledge that a majority of the negotiations, anticipated performance and execution of this Agreement occurred or shall occur in Marion County, Florida. Any civil action or legal proceeding arising out of or relating to this Agreement shall be brought only in the courts of record of the State of Florida in Marion County or the United States District Court, Middle District of Florida, Ocala Division. Each party consents to the exclusive jurisdiction of such court in any such civil action or legal proceeding and waives any objection to the laying of venue of any such civil action or legal proceeding in such court and/or the right to bring an action or proceeding in any other court. Service of any court paper may be effected on such party by mail, as provided in this Agreement, or in such other manner as may be provided under applicable laws, rules of procedures or local rules.
33. **REFERENCE TO PARTIES.** Each reference herein to the parties shall be deemed to include their successors, assigns, heirs, administrators, and legal representatives, all who shall be bound by the provisions hereof.

34. **SECTION HEADINGS.** The section headings herein are included for convenience only and shall not be deemed to be a part of this Agreement.
35. **RIGHTS OF THIRD PARTIES.** Nothing in this Agreement, whether express or implied, is intended to confer any rights or remedies under or by reason of this Agreement on any persons other than the parties hereto and their respective legal representatives, successors and permitted assigns. Nothing in this Agreement is intended to relieve or discharge the obligation or liability of any third persons to any party to this Agreement, nor shall any provision give any third persons any right of subrogation or action over or against any party to this Agreement.
36. **AMENDMENT.** No amendment to this Agreement shall be effective except those agreed to in writing and signed by both of the parties to this Agreement.
37. **COUNTERPARTS.** This Agreement may be executed in counterparts, each of which shall be an original and all of which shall constitute the same instrument.
38. **ELECTRONIC SIGNATURE(S).** Consultant, if and by offering an electronic signature in any form whatsoever, will accept and agree to be bound by said electronic signature to all terms and conditions of this agreement. Further, a duplicate or copy of the agreement that contains a duplicated or non-original signature will be treated the same as an original, signed copy of this original agreement for all purposes.
39. **ENTIRE AGREEMENT.** This Agreement, including those documents referenced in the Contract Documents section of this Agreement, constitute the entire Agreement between the parties hereto with respect to the subject matter hereof. There are no other representations, warranties, promises, agreements or understandings, oral, written or implied, among the Parties, except to the extent reference is made thereto in this Agreement. No course of prior dealings between the parties and no usage of trade shall be relevant or admissible to supplement, explain, or vary any of the terms of this agreement. Acceptance of, or acquiescence in, a course of performance rendered under this or any prior agreement shall not be relevant or admissible to determine the meaning of this Agreement even though the accepting or acquiescing party has knowledge of the nature of the performance and opportunity to make objection. No representations, understandings, or agreements have been made or relied upon in the making of this Agreement other than those specifically set forth herein.
40. **LEGAL AUTHORITY.** Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.

**[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK. SIGNATURE PAGE TO FOLLOW.]**

**IN WITNESS WHEREOF**, the parties have executed this Agreement on \_\_\_\_\_.

**ATTEST**

**CITY OF OCALA**

\_\_\_\_\_  
Angel B. Jacobs  
City Clerk

\_\_\_\_\_  
Ire Bethea, Sr.  
City Council President

**Approved as to form and legality:**

**HDR ENGINEERING, INC.**

\_\_\_\_\_  
  
\_\_\_\_\_  
(Name)

\_\_\_\_\_  
  
\_\_\_\_\_  
(Name of Authorized Signatory)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Title of Authorized Signatory)

## **Comprehensive Operational Analysis (COA) Procurement**

### **Introduction**

A Comprehensive Operational Analysis (COA) provides a public transportation authority/agency with a thorough, route-by-route evaluation of existing transit services as well as a detailed evaluation of existing operations functions and performance. When possible, it is recommended that a transit authority/agency complete a COA effort immediately before starting a Major Ten-Year Transit Development Plan (TDP)<sup>1</sup>. This is suggested because the detailed amount of operational data and characteristics collected and analyzed in a COA process differs from the more strategic planning approach required in the State of Florida for TDP development. A detailed and thorough COA effort is most effective when the findings offer clear directions on how and where limited financial and human capital should be best applied to existing transit services and, in some cases, additional (unmet) demand. Overall, a detailed COA process should allow for planners and decision makers to know more about the efficiency and effectiveness of their current public transportation services and offer a clear and prioritized set of recommendations on how to best maintain an optimal public transportation system.

### **Purpose**

The purpose of this Comprehensive Operational Analysis (COA) is to evaluate the effectiveness, efficiency, and sustainability of SunTran's transit services and organizational structure, and to assess the financial and operational feasibility of transitioning transit operations and maintenance functions to in-house delivery. The COA will provide decision-makers with objective, data-driven findings and recommendations to support long-term service, staffing, and financial planning.

### **Minimum qualifications/experience requirements.**

As part of the selection process, firms must first demonstrate they are qualified to participate in the solicitation process by clearly showing they meet the minimum qualification requirements set forth herein. Proposals submitted by firms that do not meet the qualification requirements will not be accepted:

- (a) Proposer must have no less than seven (7) years' experience in developing a COA study for transit operations for other governmental agencies.
- (b) Proposer must have completed at least three (3) directly comparable projects.
- (c) Demonstrate the firm and staff capabilities to perform all aspects of this particular Project.
- (d) Information regarding the expertise and experience of staff person(s) to be assigned to work on the Project. It should also contain specific proposed responsibilities of the Project staff person(s), and coordination of activities with ITP staff.
- (e) References for all similar or related Projects if firm has not performed work previously for ITP.

### **Contract Term**

The resulting contract will be for term of two (2) years. The duration to complete the study must be no longer than 9 months from kick-off meeting with City staff.

## **Scope of Work**

Consultant to develop a Comprehensive Operational Analysis (COA). A COA will explore the improvements that need to be made at SunTran based on changes in ridership, development, population and employment patterns, and service performance. The overall goal of this COA effort is to develop a plan that will enhance the efficiency and effectiveness of the existing and planned SunTran system in a changing transit market environment. The core of the COA is the short-term plan. It will recommend route changes designed to improve service efficiency, apply resources where they are most needed, and modernize the route network based upon current and projected conditions within the service area. The COA shall include a comprehensive feasibility study to evaluate the costs, risks, and organizational impacts of bringing transit operations and maintenance functions in-house, compared to the current delivery model.

The COA will require extensive data collection and analysis with intensive field investigation and team evaluation. The development of short and mid-range recommendations will be based on:

- A field survey including the trailing of all bus routes.
- A comprehensive and statistically significant on-board and stop-by-stop data collection effort, including a ride check survey and transfer analysis of all Weekday and Weekend operations.
- Interviews and work sessions with SunTran personnel, including management and line staff active in operations, maintenance, customer service, scheduling/planning and other activities related to service delivery.
- Detailed analysis that profiles existing operational characteristics of the interrelated aspects of the SunTran system including planning, scheduling, dispatching, bus maintenance, road supervision and related road response activities, facilities and staffing levels, and fare structure and accessibility.
- Detailed assessment of existing and potential transit markets, including current and project employment and population data analysis, existing market identification, new market/rider assessment, and strategies to attract new riders to the system.
- Development of short and mid-range recommendations that provide the optimal path to increased ridership, improved service performance, access to underserved and expanded transit markets, increased fare revenue and additional paths to long-term financial stability.

The Consultant shall focus on providing practical recommendations to improve the productivity and cost-effectiveness of the existing fixed route system, generating additional ridership and passenger revenue, and further enhance SunTran's image throughout Ocala and Marion County. The duration to complete this study shall take **no longer than 9 months**.

The final Work Scope is comprised of the following Tasks:

### **1.0. Study Initiation/Project Management Plan and Schedule**

**Purpose:** To provide direction and cohesive project management services throughout the course of the project.

**Methodology:** The Consultant Project Manager will meet with SunTran staff at the start of the project to discuss the work plan, schedule and relevant issues/concerns. The final work scope will provide the blueprint for which ensuing tasks will be conducted. The

Consultant will manage and coordinate the work elements, prepare monthly progress reports, and provide a single point of communication and responsibility with the Agency's Project Manager. SunTran staff will be responsible for the organization of an internal project committee:

- Transit Steering Committee (TSC) will be responsible for providing advisory input into the study throughout its duration. Key staff will be identified to participate on the TSC.

**Deliverables:** One (1) final work scope and one (1) schedule will be prepared following the one (1) internal Agency kick-off meeting. Up to five (5) TSC meetings will be held. Up to twelve (12) monthly progress reports will be completed summarizing all COA activities, including summaries of the project results to date, TSC and public meeting input, identification of outstanding issues, and schedule of forthcoming work clearly identifying the planned activities for the upcoming months.

## 2.0. Staff and Public Input

**Purpose:** To solicit staff, leadership and public input regarding SunTran's system issues, concerns, suggestions, perceptions and needs.

**Methodology:** Interviews, public meetings, social media outreach, and other avenues to gauge public and existing rider opinions regarding the current system's strengths, weaknesses and opportunities will be conducted with Board Members, administration/management, operations, planning, administration, scheduling, marketing, and customer service department management and staff.

Up to eight (8) informational meetings will also be held, with assistance and the direction of SunTran staff, to solicit input on routes, schedules and service types. Consultant will assist staff with additional presentations regarding COA input/suggestions with the other entities including but not limited to the Ocala City Council, Marion County TPP, and other meetings as identified by the Project Manager.

**Deliverables:** Up to eight (8) public meetings (if necessary) and up to twenty (20) staff interviews. A Technical Memorandum that documents the results of staff interviews and all public meetings will be developed. Consultant will develop and maintain a project-specific graphical and written material for the website that coincides with the information provided in each of the monthly reports.

### 2.1 Data Collection

**Purpose:** To assemble and review information presently available and to collect new data for a comprehensive analysis of SunTran's current route performance, system operations and procedures.

**Methodology:** This Task will be divided into the following four Subtasks: (1) Review of Existing Data, (2) Origin and Destination Survey and Service Area Field Observations, (3) Rider Survey/ Data Collection, and (4) Transfer/Pass/Fare Activity Analysis. The methodology for each Subtask is described below.

**Deliverables:** Four (4) separate but related reports each detailing issues and action items from Subtasks 3.1-3.4.

### 2.2 Review of Existing, Planned, Future Conditions

The consultant team will organize and review available data and reports that pertain to the existing and envisioned transit system and current and planned transportation and land use conditions that could affect transit service. Data sources (where available) will include:

- Highway/street network information and LOS (per the TPO or FDOT)
- Existing roadway design standards and their effects on transit
- Planned roadway improvements
- Existing, planned, and future land use
- Existing/projected demographics: population, age, household size, housing, auto ownership, income, employment/unemployment, local School Board projections
- Route travel time data
- Farebox data
- Route performance reports
- Annual passenger surveys
- Daily service requirements (drivers needed for pullout and extra-board)
- Existing timetables and system maps
- Area base maps
- Fare structure/classifications
- Headway sheets/vehicle rosters/logs/turn-by-turn “paddles”
- Annual capital and operating budgets
- Fleet inventory/fleet plan/Transit Asset Management (TAM) Plan
- Detailed list of maintenance equipment, facilities, and procedures
- Existing labor agreements/work rules/operations manuals
- National Transit Database (NTD)
- Existing plan documents (Transit Development Plan, TPO LRTP, Local Comprehensive Plans, all local/municipal plans, neighboring transit agency plans)

This information will give the consultant team a better understanding of existing ridership characteristics. Five years of monthly ridership reports will be reviewed for analysis.

**Deliverable:** Existing/Planned/Future Conditions or “Trending” Report covering the service area and all listed aspects of SunTran’s system.

### 2.3 Service Area Observations

Consultant team members will drive each fixed route to assess the following:

- Aspects and conditions of the service area.
- Current route alignments and passenger transit facilities.
- Major traffic generators, street networks, community characteristics and geographic areas.

**Deliverable:** Brief/report outlining the field observations of the current system characteristics. Route-specific characteristics and items of interest will be noted and reported to staff.

### 2.4 Route and Stop-by-Stop Surveys/Data Collection

The rider survey will provide an accurate, statistically significant, data-rich, and replicable collection of data related for all existing Weekday and Weekend bus trips. The Consultant and SunTran staff will finalize an agreed-upon sample methodology and sample size as part of the finalization of the Scope under Task 1.0. In this Task, in-person rider surveys will provide stop-by-stop and segment-level ridership information, identify the location of peak load points, and provide time-of-day route details. SunTran staff will assist the Consultant in the formulation of the sampling methodology and approach that ensures every bus run and bus stop is surveyed adequately.

## 2.5 Data Collection and Supervision

Data collection will be administered and supervised by the Consultant team. All surveys will occur when K-12 schools are in session. Preparation for data collection will include SunTran supplying the Consultant with an up-to-date bus stop inventory. The Consultant shall conduct a training session for the surveyors instructing them how to collect the data as well as how to interact with staff and the public. Surveyors will ride on-board the vehicles to conduct rider surveys. For each scheduled time point, the surveyor will record the time on a data form. For each stop, the surveyor will record the number of alighting and boarding passengers.

The consultant will build a sampling plan that demonstrates how a robust data set for each SunTran bus stop and route will be built by in-person surveyors and potentially supplemented by technology-based data collection technology such as APCs.

## 2.6 Quality Assurance

Several procedures should be implemented to achieve acceptable levels of project accuracy, accountability, and completeness. These include:

- Surveyors will receive comprehensive training by the Consultant prior to the onset of actual data collection.
- Surveyors will manually record data on pre-printed survey forms or tablets. Surveyors will complete information at the start of the trip including run, vehicle, and operator numbers, and passenger load at trip start. Surveyors will also be responsible for reporting unusual circumstances or conditions encountered during the trip. Examples would include accidents/detours, inclement weather, vehicle breakdowns, and other factors that might affect operation of the route and thus, ridership and schedule data. Surveys will be redone as necessary to account for unusual or missed trips.
- Once the ridership survey is initiated, the Consultant will immediately verify each day's data to ensure that checkers have accurately followed the proper procedures. Surveyor's performance in-vehicle will also be assessed by the Consultant. Those not meeting standards will be retrained or replaced from the available pool of trained surveyors.
- Complete surveys for each entire route in a consecutive 1-to-2-day period shall be completed whenever possible. To ensure that surveys take place as scheduled every day, adequate report time will be built into the surveyor's schedules. The Consultant shall provide an appropriate number of additional surveyors who will be available to cover no-shows.

Administration of the ridership survey will require that SunTran provide a small area at the facility for survey staff. Identified areas will be used for daily surveyor reporting,

## 2.7 Data Processing

The Consultant will collect all completed surveyors results and APC data sets and tabulate into an electronic tabular format. Before tabulation, logic and accuracy checks for data will be performed. Key variables to be delineated from the edited data include:

- Total daily ridership
- Total and average ridership per trip for each time period
- Daily boardings and alightings for each stop and route segment
- Total and average boardings, alightings, load for each stop route segment, and time period
- Specific and geocoded locations or origins and destinations
- Transfer points by stop and route
- Peak load for each time period, peak hour and location of peak direction
- Running time per trip and per route segment
- Average and standard deviation of run time for each time period
- Average overall speed on each segment
- Headway variability, schedule adherence for all routes and time periods
- Available vehicle seating and standing room per trip
- Trip purpose
- Trip length
- Traffic and bus turning movement conditions and limitations
- Passenger amenities (transfer centers, bus shelters, bus stops, bus bays)
- Fare policies, fare revenue, farebox recovery
- Existing land use development patterns and trends; and,
- Existing demographics

**Deliverable:** Technical report detailing the methodology and results of the rider surveys, data collected, and initial findings.

## 3.0. Data Analysis and Evaluation of Existing Service

**Purpose:** To conduct a comprehensive route-by-route evaluation of SunTran service based on the data collected in Subtasks 3.1 – 3.3 obtain a clear understanding of the opportunities to improve each route, and assess overall responsiveness to service needs, efficiency and productivity. This task will provide key input to the development of service improvements.

**Methodology:** Route and corridor profiles will be prepared that evaluate the overall productivity, efficiency and effectiveness of each route. Segments and time-of-day productivity will be evaluated when developing individual route profiles. The following data sources will be used to access route productivity: (1) Rider surveys and established APC data sets (if applicable) will produce ridership, schedule adherence, and trip data; (2) Farebox reports will provide fare and revenue data; (3) Schedule data will provide service miles and hours; and (4) Any other relevant data as identified by the Consultant and SunTran staff. The Consultant will analyze and review the following operational, service alignment and scheduling characteristics for each route and supportive systems in the following areas:

- Headways (service frequencies)
- Passenger loads by route segments relative to capacity
- Route complexity, including deviations and turn-backs

- Location/hierarchy of system transfer locations
- Fleet utilization and assignment by vehicle and time period
- Directness and redundancy of route alignments
- Scheduled arrival/departure times at time points and key trip generators
- Layover and terminal locations and recovery times
- Bus stop locations and spacing
- Pull-out adherence
- Schedule adherence
- Scheduling software, techniques, and methodologies
- Dispatch operations
- Bus traffic control operations
- Deadhead routing and assignments
- Driver relief
- Route alignment, frequency, and span of service
- Passenger amenities (transfer centers, bus shelters, bus stops, bus bays)
- Fare policies, fare categories, fare revenue, farebox recovery
- Existing/planned land use development patterns and trends along existing routes
- Existing and projected population and economic demographics; and,
- Title VI, Equity, and other Environmental Justice (EJ) considerations

**Deliverable:** Technical Memorandum that will present a comprehensive, route-by-route evaluation of the present SunTran system. Included in the evaluation will be individual fixed route profiles and a layered assessment of the strengths and weaknesses of each route regarding the service characteristics identified above.

#### 4.0. Mobility and Regional Needs Analysis

**Purpose:** To assess the potential of expanded SunTran service fixed route and service types within the current service area and into neighboring areas, particularly where service does not currently exist or where service needs adjustment (service decreases, increases in service, consideration of flexible/on-demand services). Where possible, identify the latent demand by time of day, origin-destination zones and user group.

**Methodology:** The latest U.S. Census updates will be analyzed to identify markets of potential riders that presently have inadequate transit service. The analysis will focus on identifying markets of disadvantaged populations (i.e., those persons who because of age, mobility limitations, or low income would rely on public transportation), and commuter travel markets. This analysis will be corroborated by field investigations, public service requests, and interviews with SunTran management and line personnel, as well as data collected in the most recent Transit Development Plan (TDP) and any other annual passenger survey/customer request information currently collected by SunTran (*if applicable*). The analysis will compare demographic characteristics of areas with high transit ridership and will identify areas with similar characteristics that are presently underserved by transit. Key trip generators with possible latent demand will also be identified. Additionally, optimal locations for new service types will be identified. Overall, this analysis will evaluate potential needs within the present SunTran service area and look at demand in areas outside of the present service area.

A mobility and regional needs market assessment will examine the following in SunTran 's service area:

- Housing, employment, transit dependency, and other trip generating data
- Commuting patterns within service area location and to surrounding counties

- Assessment of other origin/destination data from other sources (if available)
- Assessment of most commuting and transit demand from recent LRTP
- Assessment of projected travel markets from other transit studies from the region; and,
- Title VI, Equity, and other Environmental Justice (EJ) considerations

**Deliverable:** Results of the mobility and regional demand analysis will be incorporated in the development of a report that includes distinct short-term and mid-range recommendations. Results will be compared with suggestions/comments by the public in a discernable matrix that outlines current needs both within the current service area and in neighboring areas.

## 5.0. Recommended Agency Service Performance Standards/Policies

**Purpose:** Based on data and public input gathered through Tasks' 1-5, the Consultant will provide detailed recommendations to SunTran in the development of a series of recommended service performance standards and policies for existing and proposed service types. Policy guidelines will include, but is not limited to the following categories of service performance standards and policies:

- Transit Industry Standards
  - Total boardings
  - Passengers per Hour
  - Cost and Subsidy Per Passenger
  - Fare Box Recovery
  - On-Time Performance (OTP)
  - Customer complaints
  - Preventable Accidents per Revenue Mile
- Transit Travel Time
  - System speed
  - Delays/definition of/types
  - Transfer time
- Service Planning
  - Route ranking/tiers/thresholds system
  - Ridership thresholds
  - Headway
  - Service Span
  - Deadhead Routing
- Transit Experience
  - Reliability
  - Comfort
  - Passenger environment
  - Customer satisfaction
- Safety and Security
  - Vehicle accident rate
  - Passenger accident rate
  - Crime rate
  - Vehicle safety systems
- Maintenance
  - Road calls
  - Fleet cleaning
  - Spare ratio
  - Fleet maintenance performance

- Staffing
- Operations
  - Overtime
  - Light-duty
  - Extra-board
  - Dispatch
  - Staffing
- Scheduling
  - Interlining
  - Relief time and relief points/layovers
  - Efficiency
- Fare & Transfer Policies
  - Fares by type
  - Passes
- Transfer Policies & Community Perception of Transit System
  - Community economic impact
  - Employment impact
  - Mobility
  - Environmental impact
- Linking Performance Standards with Planning and Compliance
  - Transit Development Plan (TDP)
  - Title VI Plan
  - Transit Asset Management (TAM) Plan
  - Public Transportation Agency Safety Plan (PTASP)
  - Coordination with MPO on TAM & PTASP performance measures

**Deliverable:** Final Technical Memorandum with recommendations on optimal service and performance measures. SunTran will utilize and manage, finalize what will be measured, and provide direction on how they will be disseminated to the public, administration, and governing board. Based on established performance and productivity policies and standards, these are the policies and technical standards that will assist SunTran in adjusting service where needed based on the findings of this COA effort.

## 6.0. Service Implementation Plan

**Purpose:** The Consultant shall provide a detailed summary of the recommended service plan for SunTran services for two time periods.

### 6.1 Short-Term Recommendations (Years 1-2)

**Purpose:** The short-term recommendations comprise the major effort of COA. The short-term recommendations are designed to be conducted over a two-year period, to allow for careful implementation, performance monitoring, and ample time for feedback by SunTran staff and the public.

**Methodology:** Input from all previous Tasks will form the basis for developing service proposals. Recommendations will address the service issues identified in Task's 2-5 and will most likely center on improving route and cost efficiencies. This includes:

- Optimal Routing and Service by Route and Corridor: Service parameters for each route or service by day of the week, including:
  - Service periods

- Service frequencies by time period
- Vehicle requirements by time period and propulsion system
- Service hours and miles
- Timepoint spacing
- Round-trip running times
- Trip distances
- Integrating flex routing/on-demand services/microtransit
- Integrating new technologies
- Interlining combinations
- Integration with other transit modes and/or services on regional corridors
- Required fleet, including EV vehicle charging needs
- Facility and equipment needs
- Total operating and capital cost needs for all scenarios

**Deliverable:** Development of a System Improvement Plan, which will include detailed run cuts for each route and grouping(s) of changes, driver/staffing requirements for each run cut and suggested improvement, graphical and GIS maps/layers, tables, descriptions, proposed new routes or routing, proposed policy recommendations, and estimated capital and operating costs required for each recommendation but clearly delineating those changes that are within existing (budget neutral) resources and those that will require additional resources.

## 6.2 Mid-Range Recommendations (Years 3-5)

**Purpose:** To identify potential service modifications in a mid-range (3-5 years). These recommendations will include new service needs, such as increases in headways, service span, routing, and all other additions of service.

**Methodology:** All recommendations for the mid-range will be carefully staged to support changes that occur because of the implementation of the short-term Priority System Improvement Plan. Mid-range improvements will likely require additional resources. In addition, pulling from the latent demand analysis (Task 5), will be a primary source for identifying the potential for expanded service, new service types, new routes, service into neighboring areas, and the need for additional capital resources (such as bus stops/amenities, transit centers, park-and-ride lots, transfer/administrative/maintenance facilities, and ITS investments).

**Deliverable:** Development of a final Optimized System Investment Plan, which will include graphical and GIS maps/layers, tables, descriptions, proposed new routes or routing, proposed policy recommendations, estimated capital and operating costs to implement each change that can be potentially implemented within the next 3-5 years, and the identification of funding approaches for new or expanded services.

## 7.0. In-House Operations and Maintenance Cost and Feasibility Study Analysis

**Purpose:** To evaluate the financial, operational, and organizational feasibility of transitioning transit operations and maintenance (O&M) functions from current external contracting to fully in-house delivery by SunTran and the City of Ocala. The analysis will produce a comparative cost model, sensitivity analyses, and recommendations supported by quantitative data and narrative justification. This Task helps inform Agency leadership on the long-term total cost of ownership and risks associated with in-house transit O&M delivery relative to alternative delivery models.

## 7.1 Data Collection and Baseline Definition

**Purpose:** Establish a reliable baseline for current O&M costs:

- Collect historical and current O&M expenditure data, including but not limited to
  - Labor
  - Benefits
  - Fuel
  - Parts
  - Administrative overhead
  - Insurance
  - Contract management costs

**Deliverable:** Baseline O&M dataset and documentation.

## 7.2 In-House Cost Model Development

**Objective:** Develop a fully allocated cost model to estimate SunTran/ The City of Ocala cost to provide Transit O&M in-house. Including but not limited to:

- Direct Labor Costs
  - Salaries
  - Overtime
  - Benefits
  - Training
  - Workers' Compensation
  - Labor productivity assumptions
- Indirect Costs
  - Administration
  - Human Resources support
  - Information Technology
  - Safety and compliance
  - Facilities management
- Fleet O&M Costs
  - Fuel
  - Parts
  - Consumables
  - Scheduled and unscheduled maintenance
- Facilities and Equipment
  - Utilities
  - Maintenance bays
  - Vehicle lifts
  - Specialty tools
- Compliance Costs
  - Drug and alcohol testing
  - OSHA compliance
  - FDOT compliance
  - FTA compliance

**Deliverable:** In-house O&M cost model with unit cost drivers (per vehicle/hour/mile, per employee, etc.).

### 7.3 Delivery Cost Comparison

**Objective:** Compare in-house cost model results against current delivery method, including external contractor or hybrid models.

Analysis Components:

- Annual Operating Cost Comparison: Total cost under current delivery vs. in-house delivery.
- Cost Per Service Unit: Metrics such as cost per vehicle hour, cost per revenue mile, and cost per passenger trip.

**Deliverable:** Comparative cost tables and scenario results.

### 7.4 Operational and Organizational Impact

**Objective:** Evaluate non-financial factors that materially affect feasibility.

**Assessment Areas:**

- Staffing Structure and Skills Gap Analysis: Determine need for recruitment/training to support in-house O&M.
- Workforce Transition Implications: Benefits, continuity, and retention strategies.
- Facility and Equipment Readiness: Identify infrastructure upgrades needed to support projected O&M workload.
- Risk and Contingency Assessment: Evaluate operational risks, insurance implications, and disaster resiliency.

**Deliverable:** Narrative assessment and risk register.

### 7.5 Recommendations and Implementation Roadmap

**Objective:** Provide clear conclusions and actionable steps.

**Deliverables:**

- Feasibility Conclusion: Based in cost comparison, operational capability, and risks.
- Preferred Delivery Model Recommendation: In-house, hybrid or status quo with performance enhancements.
- Implementation Plan: Staged actions, estimated timelines, roles and responsibilities, and budget requirements.
- Performance Metrics: Proposed performance and financial metrics to monitor post-implementation.

## 8.0. Final COA Report, Presentation of Findings and Executive Summary

**Purpose:** To document the results of the COA in sufficient detail to enable SunTran staff to successfully implement the service recommendations and provide local decision-makers and public with valuable information regarding SunTran existing performance, cost-neutral changes that can be applied more immediately, and worthwhile investments that could occur in the future if resources become available.

**Methodology:** The consultant will present findings of the COA in report, electronic and graphics media. In addition, an Executive Summary will be developed that outlines the key findings and recommendations from previous tasks, including:

- Existing conditions and needs
- Statement of goals and objectives
- Service standards and policies
- Summary of community engagement
- Service revision recommendations (short-term, mid-range); and,
- Service recommendations action plan

**Deliverable:** The Consultant will prepare a Final COA Report and Executive Summary that documents all aforementioned work elements, results, and recommendations. After a suitable period of review by SunTran staff, a final COA Report will be produced, incorporating review comments. The Consultant will, (with the assistance of SunTran staff), design the Final Report presentation graphics. The Final COA Report and Executive Summary will be tailored into a final presentation and provided in an electronic version that is formatted for ADA accessibility. In addition, up to eight (8) additional meetings will be provided based on staff recommendations, including presentations to all relevant governing boards.

City of Ocala

RFP# 260384

**EXHIBIT B – FTA REQUIRED CLAUSES - ADDENDUM TO CONTRACTUAL  
TERMS AND CONDITIONS**

FEDERALLY ASSISTED PROFESSIONAL SERVICES

"The supplier of goods or services must adhere to the following Federal Transit Administration requirements. The burden is on the supplier to read and understand each requirement based on the information provided. Execution of the contract implies agreement with the attached Federal Clauses and Certifications."

The Contractor clauses and provisions of this Exhibit apply to all Federally assisted supply and service contracts. These provisions supersede and take precedence over any other clause or provision contained within this contract which may be in conflict therewith.

**1. EQUAL EMPLOYMENT OPPORTUNITY**

This clause applies to all contracts, except contracts for standard commercial supplies or raw materials and construction. During the performance of this contract, the Contractor agrees as follows:

- (a) The Contractor shall not discriminate against any employee or applicant for employment because of race, color, creed, sex, disability, age or national origin.
- (b) The Contractor shall take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, sex, disability, age, or national origin. This shall include, but not be limited to: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.
- (c) The Contractor shall include the provisions of paragraphs (a) and (b) of this clause in every Subcontract or purchase order except for standard commercial supplies or raw materials and construction.

**2. DISADVANTAGED BUSINESS ENTERPRISE (DBE)**

**FLOW DOWN.** The DBE contracting requirements flow down to all third-party contractors and their contracts at every tier. It is the recipient's and prime contractor's responsibility to ensure the DBE requirements are applied across the board to all subrecipients/contractors/subcontractors. Should a subcontractor fail to comply with the DBE regulations, FTA would look to the recipient to make sure it intervenes to monitor compliance. The onus for compliance is on the recipient.

For all DOT-assisted contracts, each FTA recipient must include assurances that third party contractors will comply with the DBE program requirements of 49 C.F.R. part 26, when applicable. The following contract clause is required in all DOT-assisted prime and subcontracts:

The contractor, subrecipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 C.F.R. part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as the recipient deems appropriate, which may include, but is not limited to:

- (1) Withholding monthly progress payments;
- (2) Assessing sanctions;
- (3) Liquidated damages; and/or
- (4) Disqualifying the contractor from future bidding as non-responsible. 49 C.F.R. § 26.13(b).

Further, recipients must establish a contract clause to require prime contractors to pay subcontractors for satisfactory performance of their contracts no later than 30 days from receipt of each payment the recipient makes to the prime contractor. 49 C.F.R. § 26.29(a).

Finally, for contracts with defined DBE contract goals, each FTA recipient must include in each prime contract a provision stating that the contractor shall utilize the specific DBEs listed unless the contractor obtains the recipient's written consent; and that, unless the recipient's consent is provided, the contractor shall not be entitled to any payment for work or material unless it is performed or supplied by the listed DBE. 49 C.F.R. § 26.53(f) (1). As an additional resource, recipients can draw on the following language for inclusion in their federally funded procurements.

**Overview.** It is the policy of the AGENCY and the United States Department of Transportation ("DOT") that Disadvantaged Business Enterprises ("DBE's"), as defined herein and in the Federal regulations published at 49 C.F.R. part 26, shall have an equal opportunity to participate in DOT-assisted contracts. It is also the policy of the AGENCY to:

1. Ensure nondiscrimination in the award and administration of DOT-assisted contracts;
2. Create a level playing field on which DBE's can compete fairly for DOT-assisted contracts;
3. Ensure that the DBE program is narrowly tailored in accordance with applicable law;
4. Ensure that only firms that fully meet 49 C.F.R. part 26 eligibility standards are permitted to participate as DBE's;
5. Help remove barriers to the participation of DBEs in DOT assisted contracts;
6. To promote the use of DBEs in all types of federally assisted contracts and procurement activities; and
7. Assist in the development of firms that can compete successfully in the marketplace outside the DBE program.

This Contract is subject to 49 C.F.R. part 26. Therefore, the Contractor must satisfy the requirements for DBE participation as set forth herein. These requirements are in addition to all other equal opportunity employment requirements of this Contract. The AGENCY shall make all determinations with regard to whether or not a Bidder/Offeree is in compliance with the requirements stated herein. In assessing compliance, the AGENCY may consider during its review of the Bidder/Offeree's submission package, the Bidder/Offeree's documented history of non-compliance with DBE requirements on previous contracts with the AGENCY.

**Contract Assurance.** The Contractor, subrecipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. The Contractor shall carry out applicable requirements of 49 C.F.R. part 26 in the award and administration of DOT-assisted contracts. Failure by the Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or such other remedy as the AGENCY deems appropriate.

**DBE Participation.** For the purpose of this Contract, the AGENCY will accept only DBE's who are:

1. Certified, at the time of bid opening or proposal evaluation, by the [certifying agency or the Unified Certification Program (UCP)]; or
2. An out-of-state firm who has been certified by either a local government, state government or Federal government entity authorized to certify DBE status or an agency whose DBE certification process has received FTA approval; or
3. Certified by another agency approved by the AGENCY.

**DBE Participation Goal.** The DBE participation goal for this Contract is set at 2.55%. This goal represents those elements of work under this Contract performed by qualified Disadvantaged Business Enterprises for amounts totaling not less than 10.65% of the total Contract price. Failure to meet the stated goal at the time of proposal submission may render the Bidder/Offeree non-responsive.

**Proposed Submission.** Each Bidder/Offeree, as part of its submission, shall supply the following information:

1. A completed DBE Utilization Form (see below) that indicates the percentage and dollar value of the total bid/contract amount to be supplied by Disadvantaged Business Enterprises under this Contract.
2. A list of those qualified DBE's with whom the Bidder/Offeree intends to contract for the performance of portions of the work under the Contract, the agreed price to be paid to each DBE for work, the Contract items or parts to be performed by each DBE, a proposed timetable for the performance or delivery of the Contract item, and other information as required by the DBE Participation Schedule (see below). No work shall be included in the Schedule that the Bidder/Offeree has reason to believe the listed DBE will subcontract, at any tier, to other than another DBE. If awarded the Contract, the Bidder/Offeree may not deviate from the DBE Participation Schedule submitted in response to the bid. Any subsequent changes and/or substitutions of DBE firms will require review and written approval by the AGENCY.
3. An original DBE Letter of Intent (see below) from each DBE listed in the DBE Participation Schedule.

4. An original DBE Affidavit (see below) from each DBE stating that there has not been any change in its status since the date of its last certification.

**Good Faith Efforts.** If the Bidder/Offeror is unable to meet the goal set forth above (DBE Participation Goal), the AGENCY will consider the Bidder/Offeror's documented good faith efforts to meet the goal in determining responsiveness. The types of actions that the AGENCY will consider as part of the Bidder/Offeror's good faith efforts include, but are not limited to, the following:

1. Documented communication with the AGENCY's DBE Coordinator (questions of IFB or RFP requirements, sub-contracting opportunities, appropriate certification, will be addressed in a timely fashion);
2. Pre-bid meeting attendance. At the pre-bid meeting, the AGENCY generally informs potential Bidder/Offeror's of DBE subcontracting opportunities;
3. The Bidder/Offeror's own solicitations to obtain DBE involvement in general circulation media, trade association publication, minority-focus media and other reasonable and available means within sufficient time to allow DBEs to respond to the solicitation;
4. Written notification to DBE's encouraging participation in the proposed Contract; and
5. Efforts made to identify specific portions of the work that might be performed by DBE's.

The Bidder/Offeror shall provide the following details, at a minimum, of the specific efforts it made to negotiate in good faith with DBE's for elements of the Contract:

1. The names, addresses, and telephone numbers of DBE's that were contacted;
2. A description of the information provided to targeted DBE's regarding the specifications and bid proposals for portions of the work;
3. Efforts made to assist DBE's contacted in obtaining bonding or insurance required by the Bidder or the Authority.

Further, the documentation of good faith efforts must include copies of each DBE and non-DBE subcontractor quote submitted when a non-DBE subcontractor was selected over a DBE for work on the contract. 49 C.F.R. § 26.53(b) (2) (VI). In determining whether a Bidder has made good faith efforts, the Authority may take into account the performance of other Bidders in meeting the Contract goals. For example, if the apparent successful Bidder failed to meet the goal, but meets or exceeds the average DBE participation obtained by other Bidders, the Authority may view this as evidence of the Bidder having made good faith efforts.

**Administrative Reconsideration.** Within five (5) business days of being informed by the AGENCY that it is not responsive or responsible because it has not documented sufficient good faith efforts, the Bidder/Offeror may request administrative reconsideration. The Bidder should make this request in writing to the AGENCY's Buyer, David Williams ([dwilliams@ocalafl.gov](mailto:dwilliams@ocalafl.gov)). The Buyer will forward the Bidder/Offeror's request to a reconsideration official who will not have played any role in the original determination that the Bidder/Offeror did not document sufficient good faith efforts.

As part of this reconsideration, the Bidder/Offeror will have the opportunity to provide written documentation or argument concerning the issue of whether it met the goal or made adequate good faith efforts to do so. The Bidder/Offeror will have the opportunity to meet in person with the assigned reconsideration official to discuss the issue of whether it met the goal or made adequate good faith efforts to do so. The AGENCY will send the Bidder/Offeror a written decision on its reconsideration, explaining the basis for finding that the Bidder/Offeror did or did not meet the goal or make adequate good faith efforts to do so. The result of the reconsideration process is not administratively appealable to the Department of Transportation.

**Termination of DBE Subcontractor.** The Contractor shall not terminate the DBE subcontractor(s) listed in the DBE Participation Schedule (see below) without the AGENCY's prior written consent. The AGENCY may provide such written consent only if the Contractor has good cause to terminate the DBE firm. Before transmitting a request to terminate, the Contractor shall give notice in writing to the DBE subcontractor of its intent to terminate and the reason for the request. The Contractor shall give the DBE five days to respond to the notice and advise of the reasons why it objects to the proposed termination. When a DBE subcontractor is terminated or fails to complete its work on the Contract for any reason, the Contractor shall make good faith efforts to find another DBE subcontractor to substitute for the original DBE and immediately notify the AGENCY in writing of its efforts to replace the original DBE. These good faith efforts shall be directed at finding another DBE to perform at least the same amount of work under the Contract as the DBE that was terminated, to the extent needed to meet the Contract goal established for this procurement. Failure to comply with these requirements will be in accordance with Section 8 below (Sanctions for Violations).

**Continued Compliance.** The AGENCY shall monitor the Contractor's DBE compliance during the life of the Contract. In the event this procurement exceeds ninety (90) days, it will be the responsibility of the Contractor to submit quarterly written

reports to the AGENCY that summarize the total DBE value for this Contract. These reports shall provide the following details:

- DBE utilization established for the Contract;
- Total value of expenditures with DBE firms for the quarter;
- The value of expenditures with each DBE firm for the quarter by race and gender;
- Total value of expenditures with DBE firms from inception of the Contract; and
- The value of expenditures with each DBE firm from the inception of the Contract by race and gender.

Reports and other correspondence must be submitted to the DBE Coordinator with copies provided to the FDOT and AGENCY (City of Ocala). Reports shall continue to be submitted quarterly until final payment is issued or until DBE participation is completed.

The successful Bidder/Offeror shall permit:

- The AGENCY to have access to necessary records to examine information as the AGENCY deems appropriate for the purpose of investigating and determining compliance with this provision, including, but not limited to, records of expenditures, invoices, and contract between the successful Bidder/Offeror and other DBE parties entered into during the life of the Contract.
- The authorized representative(s) of the AGENCY, the U.S. Department of Transportation, the Comptroller General of the United States, to inspect and audit all data and record of the Contractor relating to its performance under the Disadvantaged Business Enterprise Participation provision of this Contract.
- All data/record(s) pertaining to DBE shall be maintained as stated in the ACCESS TO RECORDS AND REPORTS SECTION.

**Sanctions for Violations.** If at any time the AGENCY has reason to believe that the Contractor is in violation of its obligations under this Agreement or has otherwise failed to comply with terms of this Section, the AGENCY may, in addition to pursuing any other available legal remedy, commence proceedings, which may include but are not limited to, the following:

- Suspension of any payment or part due the Contractor until such time as the issues concerning the Contractor's compliance are resolved; and
- Termination or cancellation of the Contract, in whole or in part, unless the successful Contractor is able to demonstrate within a reasonable time that it is in compliance with the DBE terms stated herein.

#### DBE UTILIZATION FORM

The undersigned Bidder/Offeror has satisfied the requirements of the solicitation in the following manner (please check the appropriate space):

\_\_\_\_\_ The Bidder/Offer is committed to a minimum of 2.55% DBE utilization on this contract.

\_\_\_\_\_ The Bidder/Offeror is unable to meet the DBE goal of 2.55% and is committed to a minimum of \_\_\_\_\_% DBE utilization on this contract and submits documentation demonstrating good faith efforts.

\_\_\_\_\_ Bidder/Offeror cannot commit to any DBEs since work will not be subcontracted.

#### DBE PARTICIPATION SCHEDULE

The Bidder/Offeror shall complete the following information for all DBE's participating in the contract that comprises the DBE Utilization percent stated in the DBE Utilization Form. The Bidder/Offeror shall also furnish the name and telephone number of the appropriate contact person should the Authority have any questions in relation to the information furnished herein.

#### DBE IDENTIFICATION AND INFORMATION FORM

| Firm Name | Address | Contact Name | Tele-<br>phone<br>Number | Description of<br>Work to be Per-<br>formed | Race &<br>Gender<br>of Firm | Participation<br>% (of Total<br>Contract<br>Value) |
|-----------|---------|--------------|--------------------------|---------------------------------------------|-----------------------------|----------------------------------------------------|
|           |         |              |                          |                                             |                             |                                                    |
|           |         |              |                          |                                             |                             |                                                    |

**3. TITLE VI CIVIL RIGHTS ACT OF 1964**

During the performance of this Contract, the Contractor for itself, its assignees and successors in interest (hereinafter referred to as the "Contractor"), agrees as follows:

- (a) **Compliance with Regulations.** The Contractor shall comply with the Regulations relative to nondiscrimination in Federally assisted programs of the Department of Transportation (hereinafter referred to as "DOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time (hereinafter referred to as the Regulations)), which are herein incorporated by reference and made a part of this Contract.
- (b) **Nondiscrimination.** The Contractor, with regard to the work performed by it during the Contract, shall not discriminate on the grounds of race, color, or national origin in the selection and retention of Subcontractors, including procurement of materials and leases of equipment. The Contractor shall not participate either directly or indirectly in the discrimination prohibited by Section 21.5 of the Regulations, including employment practices when the Contract covers a program set forth in Appendix B of the Regulations.
- (c) **Solicitations for Subcontracts, Including Procurement of Materials and Equipment.** In all solicitations either by competitive bidding or negotiation made by the Contractor for work to be performed under a Subcontract, including procurements of materials or leases of equipment, each potential Subcontractor or supplier shall be notified by the Contractor of the Contractor's obligations under this Contract and the Regulations relative to nondiscrimination on the grounds of race, religion, color, sex, age, or national origin.
- (d) **Information and Reports.** The Contractor shall provide all information and reports required by the Regulations or directive issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by CITY OF OCALA or the Federal Transit Administration (FTA) to be pertinent to ascertain compliance with such Regulations, orders, and instructions. Where any information is required or a Contractor is in the exclusive possession of another who fails or refuses to furnish this information, the Contractor shall so certify to CITY OF OCALA, or FTA, as appropriate, and shall set forth what efforts it has made to obtain the information.
- (e) **Sanctions for Noncompliance.** In the event of the Contractor's noncompliance with the nondiscrimination provisions of this Contract, CITY OF OCALA shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to:
  - (1) withholding of payments to the Contractor under the Contract until the Contractor complies; and/or
  - (2) cancellation, termination, or suspension of the Contract, in whole or in part.
- (f) **Incorporation of Provisions.** The Contractor shall include the provisions of paragraph (1) through (f) above in every Subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations, or directives issued pursuant thereto. The Contractor shall take such action with respect to any Subcontract or procurement as CITY OF OCALA or FTA may direct as a means of enforcing such revisions including sanctions for noncompliance: provided, however, that in the event a Contractor becomes involved in, or is threatened with, litigation with a Subcontractor or supplier as a result of such direction, the Contractor may request CITY OF OCALA, and, in addition, the United States to enter into such litigation to protect the interests of CITY OF OCALA and the United States.

**4. CLEAN AIR AND WATER ACT**

- (a) **Definitions:**
  - (1) "Air Act," as used in this clause, means the Clean Air Act (42 U.S.C. § 7401 et seq.).
  - (2) "Clean air standards," as used in this clause means:
    - (i) any enforceable rules, regulations, guidelines, standards, limitations, orders, controls, prohibitions, work practices, or other requirements contained in, issued under, or otherwise adopted under the Air Act or Executive Order 11738.
    - (ii) an applicable implementation plan as described in Section 110(d) of the Air Act [42 U.S.C. § 7410(d)]; or

- (iii) an approved implementation procedure under Section 112(d) of the Air Act [42 U.S.C. § 7412(d)].
- (3) "Clean water standards," as used in this clause, means any enforceable limitation, control, condition, prohibition, standard, or other requirement promulgated under the Water Act or contained in a permit issued to a discharger by the Environmental Protection Agency or by a State under an approved program, as authorized by Section 402 of the Water Act (33 U.S.C. § 1342), or by local government to ensure compliance with pre-treatment regulations as required by Section 307 of the Water Act (33 U.S.C. § 1317).
- (4) "Compliance," as used in this clause, means compliance with:
  - (i) clean air or water standards; or
  - (ii) a schedule or plan ordered or approved by a court of competent jurisdiction, the Environmental Protection Agency, or an air or water pollution control agency under the requirements of the Air Act or Water Act and related regulations.
- (5) "Facility," as used in this clause, means any building, plant, installation, structure, mine, vessel or other floating craft, location, or site of operations, owned, leased, or supervised, by a Contractor or Subcontractor, sued in the performance of a contract or subcontract. When a location or site of operations includes more than one building, plant, installation, or structure, the entire location or site shall be deemed a facility except when the Administrator, or a designee of the Environmental Protection Agency, determines that independent facilities are co-located in one geographical area.
- (6) "Water Act," as used in this clause, means Clean Water Act (33 U.S.C. § 1251 et seq.).
- (b) The Contractor agrees:
  - (1) to comply with all the requirements of Section 114 of the Clean Air Act (42 U.S.C. § 7414) and Section 308 of the Clean Water Act (33 U.S.C. § 1318) relating to inspection, monitoring, entry, reports, and information, as well as other requirements specified in Section 114 and Section 308 of the Air Act and the Water Act, and all regulations and guidelines issued to implement those acts before the award of this Contract.
  - (2) that no portion of the work required by the prime Contract will be performed in a facility listed on the Environmental Protection Agency List of Violating Facilities on the date when this Contract was awarded unless and until the EPA eliminates the name of the facility from the listing;
  - (3) to use best efforts to comply with clean air standards and clean water standards at the facility in which the Contract is being performed; and
  - (4) to insert the substance of this clause into any nonexempt Subcontract, including this paragraph (b)(4).

## **5. ENERGY POLICY AND CONSERVATION ACT**

The Contractor shall recognize mandatory standards and policies relating to energy efficiency contained in the State Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. § 6321 et seq.).

## **6. OFFICIALS NOT TO BENEFIT**

No member of or delegate to Congress, or resident commissioner, shall be admitted to any share or part of this Contract or to any benefit arising from it. However, this clause does not apply to this Contract to the extent that this Contract is made with a corporation for the corporation's general benefit.

## **7. FLY AMERICA**

The Contractor agrees that international air transportation of any persons involved in or property acquired for the Contract must be provided by U.S. flag air carriers to the extent service by these carriers is available, as required by the International Air Transportation Fair Competitive Practices Act of 1974, as amended, 49 U.S.C. 40118, in accordance with U.S. GAO

regulations, "Uniform Standards and Procedures for Transportation Transactions," 4 C.F.R. Part 52, and U.S. GAO Guidelines for Implementation of the "Fly America Act" B-138942, 1981 U.S. Comp. Gen. LEXIS 2166. March 31, 1981.

## **8. AUDIT AND INSPECTION OF RECORDS**

- (a) This clause is applicable if this Contract was entered into by means of negotiation and shall become operative with respect to any modification to this Contract whether this Contract was initially entered into by means of negotiation or by means of formal advertising.
- (b) The Contractor shall maintain records, and CITY OF OCALA, the U.S. Department of Transportation, and the Comptroller General of the United States or any of their duly authorized representatives shall, until the expiration of three (3) years after final payment under this Contract, have access to and the right to examine any directly pertinent books, documents, papers, and records of such Contractor, involving transactions related to the Contract, for the purpose of making audit, examination, excerpts and transcriptions.
- (d) The Contractor further agrees to include in all Subcontracts hereunder a provision to the effect that the Subcontractor agrees that CITY OF OCALA, the U.S. Department of Transportation, and the Comptroller General of the United States or any of their duly authorized representatives shall, until the expiration of three (3) years after final payment under this Contract, have access to and the right to examine any directly pertinent books, documents, papers and records of such Subcontractor, involving transactions related to the Subcontract, for the purpose of making audit, examination, excerpts and transactions.

## **9. RESTRICTIONS ON LOBBYING**

- (a) The Contractor shall timely comply with the requirements of the lobbying restrictions set forth in Section 319 of Public Law 101-121, as implemented by the Department of Transportation in 49 C.F.R. Part 20, and as those authorities may be hereafter amended.
- (b) If a Standard Form LLL, "Disclosure Form to Report Lobbying," is required to be completed by the Contractor or Subcontractor at any tier, such disclosure form shall be furnished to CITY OF OCALA.

## **10. ACCESS REQUIREMENTS TO INDIVIDUALS WITH DISABILITIES**

The Contractor shall comply with all applicable requirements of the Americans with Disabilities Act of 1990 (ADA), 42 U.S.C. 12101 et seq. and 49 U.S.C. § 322; Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. § 794; Section 16 of the Federal Transit Act, as amended, 49 U.S.C. app. 1612; and the following regulations and any amendments thereto:

- (a) U.S. DOT regulations, "Transportation Services for Individuals with Disabilities (ADA)," 49 C.F.R. Part 37;
- (b) U.S. DOT regulations, "Nondiscrimination on the Basis of Handicap in Programs and Activities Receiving or Benefiting from Federal Financial Assistance," 49 C.F.R. Part 27;
- (c) U.S. DOT regulations, "Americans With Disabilities (ADA) Accessibility Specifications for Transportation Vehicles," 49 C.F.R. Part 39;
- (d) Department of Justice (DOJ) regulations, "Nondiscrimination on the Basis of Disability in State and Local Government Services," 28 C.F.R. Part 36;
- (e) DOJ Regulations, "Nondiscrimination on the Basis of Disability by Public Accommodations and in Commercial Facilities," 28 C.F.R. Part 36;
- (f) General Services Administration regulations, "Construction and Alteration of Public Buildings," "Accommodations for the Physically Handicapped," 41 C.F.R. Parts 101-10;
- (g) Equal Employment Opportunity Commission (EEOC) "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 C.F.R. Part 1630;
- (h) Federal Communications Commission regulations, "Telecommunications Relay Services and Related Customer Premises Equipment for the Hearing and Speech Disabled," 47 C.F.R. Part 64, Subpart F; and

- (i) FTA regulations, "Transportation for Elderly and Handicapped Persons", 49 C.F.R. Part 609.

**11. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS AND RELATED ACTS**

- (a) The Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 et seq. and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 C.F.R. Part 31, apply to its actions pertaining to this Contract. The Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the Contract or the FTA assisted project for which this Contract work is being performed. In addition to other penalties that may be applicable, the Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on the Contractor to the extent the Federal Government deems appropriate.
- (b) The Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under CITY OF OCALA of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307(n)(1) on the Contractor, to the extent the Federal Government deems appropriate.
- (c) The Contractor agrees to include the above two clauses in each Subcontract associated with this Contract. It is further agreed that the clauses shall not be modified, except to identify the Subcontractor who will be subject to the provisions.

**12. PRIVACY ACT**

- (a) The Contractor agrees to comply with, and assures the compliance of its employees with, the information restriction and other applicable requirements of the Privacy Act of 1974, 5 U.S.C. § 552a. Among other things, the Contractor agrees to obtain the express consent of the Federal Government before the Contractor or its employees operate a system of records on behalf of the Federal Government. The Contractor understands that the requirements of the Privacy Act, including the civil and criminal penalties for violation of that Act, apply to those individuals involved, and that failure to comply with the terms of the Privacy Act may result in termination of the Contract.
- (b) The Contractor agrees to include the above clause in each Subcontract associated with this Contract. It is further agreed that the clauses shall not be modified, except to identify the Subcontractor who will be subject to the provisions.

**13. NO OBLIGATION BY THE FEDERAL GOVERNMENT**

- (a) Notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the Contract, absent the express written consent by the Federal Government, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to the Contractor, or any other party (whether or not a party to that Contract) pertaining to any matter resulting from the underlying Contract.

The Contractor agrees to include the above clause in each Subcontract associated with this Contract. The clause shall not be modified, except to identify the Subcontractor who will be subject to its provisions.

**14. NOTICE OF FEDERAL REQUIREMENTS**

- (a) The Contractor shall at all times comply with all applicable Federal Transit Administration (FTA) regulations, policies, procedures, and directives, including without limitation those listed directly or by reference in CITY OF OCALA's Master Agreement with the FTA, as they may be amended or promulgated from time to time during the term of this Contract. The Contractor's failure to so comply shall constitute a material breach of this Contract.
- (b) The Contractor is advised that Federal requirements applicable to this Contract as set forth in federal law, regulations, policies, and related administrative practices may change during the performance of this Contract. Any such changes shall also apply to this Contract.

**15. INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS – FTA CIRCULAR 4220.1F**

The preceding provisions include, in part, certain Standard Terms and Conditions required by the Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by DOT, as set forth in FTA Circular 4220.1F, dated November 1, 2008, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. The Contractor shall not perform any act, fail to perform any act, or refuse to comply with any Greater Richmond Transit Company (CITY OF OCALA) requests, which would cause CITY OF OCALA to be in violation of the FTA terms and conditions.

**16. SEISMIC SAFETY REGULATIONS**

The Contractor agrees that any new building or addition to an existing building will be designed and constructed in accordance with the standards for Seismic Safety required in Department of Transportation Seismic Safety Regulations 49 C.F.R. Part 41 and will certify to compliance to the extent required by the regulation. The Contractor also agrees to ensure that all work performed under this Contract including work performed by a Subcontractor is in compliance with the standards required by the Seismic Safety Regulations and the certification of compliance issued on the project.

**17. DISTRACTED DRIVING, INCLUDING TEXT MESSAGING WHILE DRIVING**

(a) The Contractor agrees to comply with:

- (1) Executive Order No. 13513, "Federal Leadership on Reducing Text Messaging While Driving," October 1, 2009, 23 U.S.C. § 402 note, (74 Fed. Reg. 51225);
- (2) U.S. DOT Order 3902.10, "Text Messaging While Driving," December 30, 2009; and:
  - (i) Adopt and enforce policies that ban text messaging while driving in Contractor-owned or rented vehicles or, if applicable, CITY OF OCALA-owned vehicles; or while driving privately-owned vehicles when performing any Work for or on behalf of CITY OF OCALA.
  - (ii) Conduct initiatives in a manner commensurate with the size of the business, such as,
    - (A) Establishment of new rules and programs or re-evaluation of existing programs to prohibit text messaging while driving; and
    - (B) Education, awareness, and other outreach to employees about the safety risks associated with texting while driving.
- (3) The following U.S. DOT Special Provision pertaining to Distracted Driving:
  - (i) *Safety*. The Contractor agrees to adopt and enforce workplace safety policies to decrease crashes caused by distracted drivers, including policies to ban text messaging while using an electronic device supplied by an employer, and driving a vehicle the driver owns or rents, a vehicle Contractor owns, leases, or rents, or a privately-owned vehicle when on official business in connection with the Contract, or when performing any work for or on behalf of the Contract;
  - (ii) *Contractor Size*. The Contractor agrees to conduct workplace safety initiatives in a manner commensurate with its size, such as establishing new rules and programs to prohibit text messaging while driving, re-evaluating the existing programs to prohibit text messaging while driving, and providing education, awareness, and other outreach to employees about the safety risks associated with texting while driving; and
  - (iii) *Extension of Provision*. The Contractor agrees to include these Special Provisions of this Contract in its sub-contract agreements and encourage its sub-contractors to comply with this Special Provision.

- (b) For purposes of this paragraph, the phrase "text messaging" means reading from or entering data into any handheld or other electronic device, including for the purpose of short message service texting, e-mailing, instant messaging, obtaining navigational information, or engaging in any other form of electronic data retrieval or electronic data communication operating a motor vehicle on an active roadway with the motor running, including while

temporarily stationary because of traffic, a traffic light, stop sign, or otherwise; it does not include operating a motor vehicle with or without the motor running when one has pulled over to the side of, or off, an active roadway and has halted in a location where one can safely remain stationary.

## **18. VETERANS EMPLOYMENT**

CITY OF OCALA is a recipient of Federal financial assistance on this Contract. The Contractor shall give a hiring preference, to the extent practicable, to veterans (as defined in Section 2108 of Title 5 C.F.R.) who have the requisite skills and abilities to perform the construction work required under the Contract. This subsection shall not be understood, construed, or enforced in any manner that would require an employer to give a preference to any veteran over any equally qualified applicant who is a member of any racial or ethnic minority, female, an individual with a disability, or a former employee.

## **19. SEAT BELT**

Seat Belt Use. The Contractor agrees to implement Executive Order No. 13043, "Increasing Seat Belt Use in the United States," April 16, 1997, 23 U.S.C. § 402 note, (62 Fed. Reg. 19217), by:

- (a) Adopting and promoting on-the-job seat belt use policies and programs for its employees and other personnel that operate company-owned vehicles, company-rented vehicles, or personally operated vehicles; and
- (b) Including a "Seat Belt Use" provision in each of its sub-contractor agreements related to the Contract.

[Flow Down Requirements](#) – This requirement flows down to all subcontracts at every tier.

## **20. PROHIBITION ON CONTRACTING FOR CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT**

- (a) Pursuant to Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, CITY OF OCALA is prohibited from using federal funds to:
  - (1) Procure or obtain,
  - (2) Extend or renew a contract to procure or obtain; or
  - (3) Enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that use "Covered Telecommunications Equipment or Services" as a substantial or essential component of any system, or as critical technology as part of any system.
- (b) As described in Public Law 115-232, section 889, "Covered Telecommunications Equipment or Services" is:
  - (1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities)
  - (2) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).
  - (3) Telecommunications or video surveillance services provided by such entities or using such equipment.
  - (4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.
- (c) Contractor shall not use or provide to CITY OF OCALA Covered Telecommunications Equipment or Services in the performance of this Contract.

- (d) Contractor shall insert the substance of this Paragraph in all subcontracts and other contractual instruments, including subcontracts for the acquisition of commercial items.
- (c) Contractor shall notify CITY OF OCALA immediately if Contractor cannot comply with the prohibition during the performance of this Contract.

**21. TERMINATION** 2 C.F.R. § 200.339; 2 C.F.R. part 200, Appendix II (B)

**FLOW DOWN.** For all contracts in excess of \$10,000, the Termination clause extends to all third-party contractors and their contracts at every tier and subrecipients and their subcontracts at every tier.

**Termination for Convenience (General Provision)** The AGENCY may terminate this contract, in whole or in part, at any time by written notice to the Contractor when it is in the AGENCY's best interest. The Contractor shall be paid its costs, including contract close-out costs, and profit on work performed up to the time of termination. The Contractor shall promptly submit its termination claim to AGENCY to be paid the Contractor. If the Contractor has any property in its possession belonging to AGENCY, the Contractor will account for the same, and dispose of it in the manner AGENCY directs.

**Termination for Convenience or Default (Cost-Type Contracts)** The AGENCY may terminate this contract, or any portion of it, by serving a Notice of Termination on the Contractor. The notice shall state whether the termination is for convenience of AGENCY or for the default of the Contractor. If the termination is for default, the notice shall state the manner in which the Contractor has failed to perform the requirements of the contract. The Contractor shall account for any property in its possession paid for from funds received from the AGENCY, or property supplied to the Contractor by the AGENCY. If the termination is for default, the AGENCY may fix the fee, if the contract provides for a fee, to be paid the Contractor in proportion to the value, if any, of work performed up to the time of termination. The Contractor shall promptly submit its termination claim to the AGENCY and the parties shall negotiate the termination settlement to be paid the Contractor.

If the termination is for the convenience of AGENCY, the Contractor shall be paid its contract close-out costs, and a fee, if the contract provided for payment of a fee, in proportion to the work performed up to the time of termination.

If, after serving a Notice of Termination for Default, the AGENCY determines that the Contractor has an excusable reason for not performing, the AGENCY, after setting up a new work schedule, may allow the Contractor to continue work, or treat the termination as a Termination for Convenience.

**Termination for Default [Breach or Cause] (General Provision)** If the Contractor does not deliver supplies in accordance with the contract delivery schedule, or if the contract is for services, the Contractor fails to perform in the manner called for in the contract, or if the Contractor fails to comply with any other provisions of the contract, the AGENCY may terminate this contract for default. Termination shall be effected by serving a Notice of Termination on the Contractor setting forth the manner in which the Contractor is in default. The Contractor will be paid only the contract price for supplies delivered and accepted, or services performed in accordance with the manner of performance set forth in the contract. If it is later determined by the AGENCY that the Contractor had an excusable reason for not performing, such as a strike, fire, or flood, events which are not the fault of or are beyond the control of the Contractor, the AGENCY, after setting up a new delivery of performance schedule, may allow the Contractor to continue work, or treat the termination as a Termination for Convenience.

**Termination for Default (Supplies and Service)** If the Contractor fails to deliver supplies or to perform the services within the time specified in this contract or any extension, or if the Contractor fails to comply with any other provisions of this contract, the AGENCY may terminate this contract for default. The AGENCY shall terminate by delivering to the Contractor a Notice of Termination specifying the nature of the default. The Contractor will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner or performance set forth in this contract.

If, after termination for failure to fulfill contract obligations, it is determined that the Contractor was not in default, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the AGENCY.

**Waiver of Remedies for any Breach** In the event that AGENCY elects to waive its remedies for any breach by Contractor of any covenant, term or condition of this contract, such waiver by AGENCY shall not limit AGENCY's remedies for any succeeding breach of that or of any other covenant, term, or condition of this contract.

**Opportunity to Cure (General Provision)** The AGENCY, in its sole discretion may, in the case of a termination for breach or default, allow the Contractor [an appropriately short period of time] in which to cure the defect. In such case, the Notice of Termination will state the time period in which cure is permitted and other appropriate conditions. If Contractor fails to remedy to AGENCY's satisfaction the breach or default of any of the terms, covenants, or conditions of this Contract within [10 days] after receipt by Contractor of written notice from AGENCY setting forth the nature of said breach or default, AGENCY shall have the right to terminate the contract without any further obligation to Contractor. Any such termination for

default shall not in any way operate to preclude AGENCY from also pursuing all available remedies against Contractor and its sureties for said breach or default.

**22. GOVERNMENT-WIDE DEBARMENT AND SUSPENSION** 2 C.F.R. part 180; 2 C.F.R part 1200; 2 C.F.R. § 200.213; 2 C.F.R. part 200 Appendix II (I); Executive Order 12549; Executive Order 12689

**FLOW DOWN.** Recipients, contractors, and subcontractors who enter into covered transactions with a participant at the next lower level, must require that participant to: (a) comply with subpart C of 2 C.F.R. part 180, as supplemented by 2 C.F.R. part 1200; and (b) pass the requirement to comply with subpart C of 2 C.F.R. part 180 to each person with whom the participant enters into a covered transaction at the next lower tier.

**Debarment, Suspension, Ineligibility and Voluntary Exclusion.** The Contractor shall comply and facilitate compliance with U.S. DOT regulations, "Nonprocurement Suspension and Debarment," 2 C.F.R. part 1200, which adopts and supplements the U.S. Office of Management and Budget (U.S. OMB) "Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement)," 2 C.F.R. part 180. These provisions apply to each contract at any tier of \$25,000 or more, and to each contract at any tier for a federally required audit (irrespective of the contract amount), and to each contract at any tier that must be approved by an FTA official irrespective of the contract amount. As such, the Contractor shall verify that its principals, affiliates, and subcontractors are eligible to participate in this federally funded contract and are not presently declared by any Federal department or agency to be:

- A. Debarred from participation in any federally assisted Award;
- B. Suspended from participation in any federally assisted Award;
- C. Proposed for debarment from participation in any federally assisted Award;
- D. Declared ineligible to participate in any federally assisted Award;
- E. Voluntarily excluded from participation in any federally assisted Award; or
- F. Disqualified from participation in any federally assisted Award.

**By signing and submitting its bid or proposal, the bidder or proposer certifies as follows:**

The certification in this clause is a material representation of fact relied upon by the AGENCY. If it is later determined by the AGENCY that the bidder or proposer knowingly rendered an erroneous certification, in addition to remedies available to the AGENCY, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment. The bidder or proposer agrees to comply with the requirements of 2 C.F.R. part 180, subpart C, as supplemented by 2 C.F.R. part 1200, while this offer is valid and throughout the period of any contract that may arise from this offer. The bidder or proposer further agrees to include a provision requiring such compliance in its lower tier covered transactions.

**23. PROVISIONS FOR RESOLUTION OF DISPUTES, BREACHES, OR OTHER LITIGATION.**

Authority – FTA Master Agreement FY2020 at Section 39(b)(1)-(2).

Applicability – all contracts

If a current or prospective legal matter that may affect the Federal Government emerges, the Contractor must promptly notify the Authority. The Contractor must include a similar notification requirement in its subcontracts at every tier for any agreement that is a "covered transaction" according to 2 C.F.R. §§ 180.220 and 1200.220.

- (1) The types of legal matters that require notification include, but are not limited to, a major dispute, breach, default, litigation, or naming the Federal Government as a party to litigation or a legal disagreement in any forum for any reason.
- (2) Matters that may affect the Federal Government include, but are not limited to, the Federal Government's interests in the Award, the accompanying Underlying Agreement, and any Amendments thereto, or the Federal Government's administration or enforcement of federal laws, regulations, and requirements.

Flow Down Requirements - The Contractor must include a similar notification requirement in its subcontracts at every tier for any agreement that is a "covered transaction" according to 2 C.F.R. §§ 180.220 and 1200.220.

**24. Motor Carrier Safety**

Authority - FTA Master Agreement, FY2020 Section 33

Applicability - all contracts

Contractor agrees that it will comply with the applicable economic and insurance registration requirements of the:

- (1) U.S. Federal Motor Carrier Safety Administration (U.S. FMCSA) regulations, "Minimum Levels of Financial Responsibility for Motor Carriers," 49 C.F.R. part 387, if it is engaged in operations requiring compliance with 49 C.F.R. part 387, it is engaged in interstate commerce, and it is not within a defined commercial zone;
- (2) The provisions of 49 U.S.C. § 31138(e)(4), which supersede inconsistent provisions of 49 C.F.R. part 387, and reduce the amount of insurance the Recipient must obtain to the highest amount required by any state in which the public transportation provider operates, if it operates within a public transportation service area located in more than one state, and receives federal assistance under 49 U.S.C. §§ 5307, 5310, and 5311;
- (3) The safety requirements of U.S. FMCSA regulations, "Federal Motor Carrier Safety Regulations," 49 C.F.R. parts 390 – 397, to the extent applicable; and
- (4) The driver's license requirements of U.S. FMCSA regulations, "Commercial Driver's License Standards, Requirements, and Penalties," 49 C.F.R. part 383, and "State Compliance with Commercial Driver's License," 49 C.F.R. part 384, to the extent applicable, with the substance abuse requirements and guidance of U.S. FMCSA's regulations, "Controlled Substances and Alcohol Use and Testing," 49 C.F.R. part 382, and implementing federal guidance, to the extent applicable.

[Flow Down Requirements](#) – This requirement flows down to all subcontracts at every tier.

**25. Protection of Sensitive and Personally Identifiable Information**

Authority - FTA Master Agreement, FY2020 Section 36(c), US DOT Common Rules

Applicability - all contracts

Contractor must implement reasonable measures to safeguard protected personally identifiable information as well as any information that the FTA or pass-through entity designates as sensitive.

[Flow Down Requirements](#) – This requirement flows down to all subcontracts at every tier.

**26. Trafficking in Persons**

Authority - Section 106(g) of the Trafficking Victims Protection Act of 2000 (TVPA), as amended, 22 U.S.C. § 7104(g); FTA Master Agreement FY 2020 at Section 4(f)

Applicability - all contracts

Contractor agrees that it and its employees that participate in the Contract, may not: Engage in severe forms of trafficking in persons during the period of time that the Contract is in effect, Procure a commercial sex act during the period of time that the Contract is in effect, or Use forced labor in the performance of the Contract or subagreements thereunder. Violation of this provision provides City of Ocala the right to unilaterally terminate the Contract.

[Flow Down Requirements](#) – This requirement flows down to all subcontracts at every tier.

**27. Federal Tax Liability and Recent Felony Convictions**

Authority - 2019 Pub. L 116-6; FTA Master Agreement FY 2020 at Section 4(g), DOT Order 4200.6.

Applicability - all contracts

By submitting a bid or otherwise attempting to enter into a contract with the City of Ocala, the undersigned Contractor certifies that it:

- (A) Does not have any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
- (B) Was not convicted of the felony criminal violation under any Federal law within the preceding 24 months.

Flow Down Requirements – This requirement flows down to all subcontracts at every tier.

## **28. Domestic Preferences for Procurements**

Authority - 2 CFR part 200 Appendix II (L); 2 C.F.R. § 200.322

Applicability - all contracts

As appropriate and to the extent consistent with law, the Contractor should, to the greatest extent practicable, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this Contract.

Flow Down Requirements – This requirement flows down to all subcontracts at every tier.

## **29. Access to Records and Reports.**

Authority - 49 U.S.C. § 5325(g), 2 C.F.R. § 200.333 and 49 C.F.R. part 633, 49 CFR part 625, 49 CFR part 630, FTA Master Agreement FY2020 at Sections 8(c)(1) and 20.

Applicability – all contracts

- a. **Record Retention.** The Contractor will retain, and will require its subcontractors of all tiers to retain, complete and readily accessible records related in whole or in part to the contract, including, but not limited to, data, documents, reports, statistics, sub-agreements, leases, subcontracts, arrangements, other third party agreements of any type, and supporting materials related to those records.
- b. **Retention Period.** The Contractor agrees to comply with the record retention requirements in accordance with 2 C.F.R. § 200.333. The Contractor shall maintain all books, records, accounts and reports required under this Contract for a period of at not less than three (3) years after the date of termination or expiration of this Contract, except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case records shall be maintained until the disposition of all such litigation, appeals, claims or exceptions related thereto.
- c. **Access to Records.** The Contractor agrees to provide sufficient access to FTA and its contractors to inspect and audit records and information related to performance of this contract as reasonably may be required. Contractor is notified

that the Authority may be subject to the Single Audit Act, set forth in 2 CFR Part 200, Subpart F – Audit Requirements, as amended.

- d. Access to the Sites of Performance. The Contractor agrees to permit FTA and its contractors access to the sites of performance under this contract as reasonably may be required.
- e. Contractor agrees to comply with FTA regulations, “Transit Asset Management; National Transit Database,” 49 C.F.R. parts 625 and 630, as applicable, and follow applicable federal guidance.

Flow Down Requirements - This requirement flows down to all subcontracts at every tier.

### 30. Patent and Rights in Data.

Authority - 2 C.F.R. part 200, Appendix II (F) and 37 C.F.R. §401.3, FTA Master Agreement FY2020 at Sections 17 and 18, FTA C 4220.1F at Appendix D

Applicability - Research projects in which FTA finances the purpose of the grant is to finance the development of a product or information. These patent and data rights requirements do not apply to capital projects or operating projects, even though a small portion of the sales price may cover the cost of product development or writing the user's manual or to micro-purchases (less than \$3,500). If the federal award meets the definition of “funding agreement” under 37 C.F.R.

§ 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business **firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,”** the recipient or subrecipient must comply with the requirements of 37 C.F.R. part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

#### ***Intellectual Property Rights***

This Project is funded through a Federal award with FTA for experimental, developmental, or research work purposes. As such, certain Patent Rights and Data Rights apply to all subject data first produced in the performance of this Contract. The Contractor shall grant the Authority intellectual property access and licenses deemed necessary for the work performed under this Agreement and in accordance with the requirements of 37 C.F.R. part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by FTA or U.S. DOT. **The terms of an intellectual property agreement and software license rights will be finalized prior to execution of this Agreement and shall, at a minimum, include the following restrictions: Except for its own internal use, the Contractor may not publish or reproduce subject data in whole or in part, or in any manner or form, nor may the Contractor authorize others to do so, without the written consent of FTA, until such time as FTA may have either released or approved the release of such data to the public. This restriction on publication, however, does not apply to any contract with an academic institution.** For purposes of this agreement, the term “subject data” means recorded information whether or not copyrighted, and that is delivered or specified to be delivered as required by the Contract. Examples of “subject data” include, but are not limited to computer software, standards, specifications, engineering drawings and associated lists, process sheets, manuals, technical reports, catalog item identifications, and related information, but do not include financial reports, cost analyses, or other similar information used for performance or administration of the Contract.

- a. The Federal Government reserves a royalty-free, non-exclusive and irrevocable license to reproduce, publish, or otherwise use, and to authorize others to use for “Federal Government Purposes,” any subject data or copyright described below. For “Federal Government Purposes,” means use only for the direct purposes of the Federal Government. Without the copyright owner's consent, the Federal Government may not extend its Federal license to any other party.

- b. Any subject data developed under the Contract, whether or not a copyright has been obtained; and
- c. Any rights of copyright purchased by the Contractor using Federal assistance in whole or in part by the FTA.
- d. Unless FTA determines otherwise, the Contractor performing experimental, developmental, or research work required as part of this Contract agrees to permit FTA to make available to the public, either FTA's license in the copyright to any subject data developed in the course of the Contract, or a copy of the subject data first produced under the Contract for which a copyright has not been obtained. If the experimental, developmental, or research work, which is the subject of this Contract, is not completed for any reason whatsoever, all data developed under the Contract shall become subject data as defined herein and shall be delivered as the Federal Government may direct.
- e. Unless prohibited by state law, upon request by the Federal Government, the Contractor agrees to indemnify, save, and hold harmless the Federal Government, its officers, agents, and employees acting within the scope of their official duties against any liability, including costs and expenses, resulting from any willful or intentional violation by the Contractor of proprietary rights, copyrights, or right of privacy, arising out of the publication, translation, reproduction, delivery, use, or disposition of any data furnished under that contract. The Contractor shall be required to indemnify the Federal Government for any such liability arising out of the wrongful act of any employee, official, or agents of the Federal Government.
- f. Nothing contained in this clause on rights in data shall imply a license to the Federal Government under any patent or be construed as affecting the scope of any license or other right otherwise granted to the Federal Government under any patent.
- g. Data developed by the Contractor and financed entirely without using Federal assistance provided by the Federal Government that has been incorporated into work required by the underlying Contract is exempt from the requirements herein, provided that the Contractor identifies those data in writing at the time of delivery of the Contract work.
- h. The Contractor agrees to include these requirements in each subcontract for experimental, developmental, or research work financed in whole or in part with Federal assistance.

Flow Down Requirements - The Patent Rights and Rights in Data requirements flow down to all third-party contractors and their contracts at every tier that meet the definition of a research-type project under 37 U.S.C. § 401.2.

Jeffrey B. Arms   
AUTHORIZED COMPANY REPRESENTATIVE

HDR Engineering, Inc.  
COMPANY NAME

3/16/26  
DATE



REQUEST FOR PROPOSAL  
**SunTran Comprehensive  
Operations Analysis**  
RFP#: SUN/260384

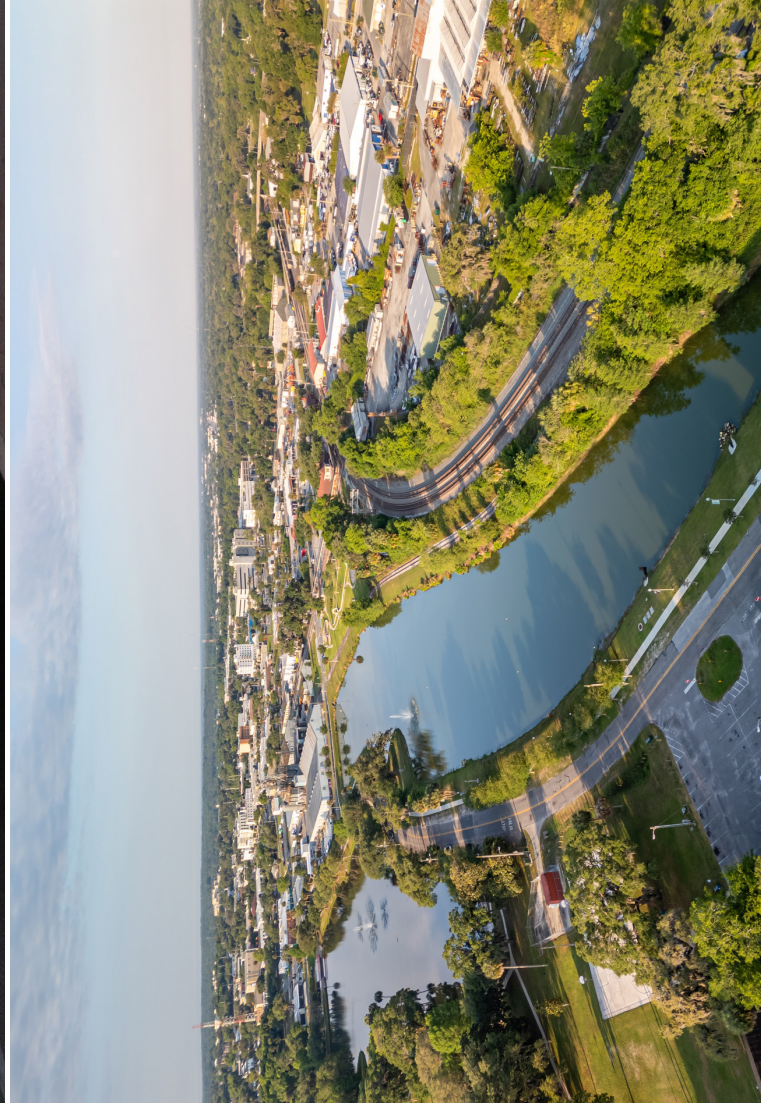
City of Ocala, FL  
March 17, 2026



HDR Engineering, Inc.  
315 E. Robinson St., Ste. 400  
Orlando, FL 32801  
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C-1



March 17, 2026  
City of Ocala  
110 SE Watula Avenue, Third Floor  
Ocala, FL 34471

**RE: RFP#: SUN/260384 SUNTRAN'S COMPREHENSIVE OPERATIONS ANALYSIS (COA)**

Dear Selection Committee Members,

The City of Ocala and SunTran are undertaking an important initiative, one that will shape the efficiency, sustainability, and long-term direction of the City's transit system. We understand the significance of this Comprehensive Operations Analysis (COA) and what it represents for SunTran's riders, staff, and future growth. Our team is prepared to deliver focused expertise, thoughtful analysis, and reliable guidance needed to support the City through this effort.

HDR is a full service multidisciplinary firm having been in business for **108 years**. For over 40 years, we've been directly engaged in shaping the long-term vision for transit in Florida, helping translate big picture visions into realistic and achievable policies, programs, and projects. We're over 14,000 employee-owners strong with more than 225 offices around the globe. While this means we bring an impressive breadth and depth of services to our clients, it's our commitment to the place we call home that makes us special. Our employees strive to make a difference every day, both in their day jobs and as community volunteers.

**HDR is the most qualified Team, providing the following benefits:**

- A project manager with extensive transit planning experience in Florida and for the City of Ocala, including on the City's most recent Transit Development Plan (TDP)
- A project team with local transit planning expertise, including members who worked on the previous TDP for the City of Ocala
- A national transportation planning and transit practice that supports best practices from around the nation, and subject matter experts specifically gathered to support the City of Ocala
- A reputation for superior client service, proven through our past similar projects with Central Florida municipal governments, counties, and the Florida Department of Transportation (FDOT)
- A corporation designated as a "Best Workplace for Commuters," showcasing our commitment to alternative modes.

The key to success is to choose a team that not only has the technical capability to complete this project, but one that also has the background and experience to do so effectively by utilizing existing resources and maintaining communication with the right people at the right time throughout the process. The City of Ocala needs a team that understands your goals and is enthusiastic about helping you achieve them. HDR is that team.

We look forward to working with you on this important project.

Sincerely,

**HDR**

  
Brian Waterman, PhD, AICP  
Project Manager

  
Jeffrey B. Arms, PE, AICP, PTOE, PMP  
Vice President (Authorized Signatory)

### Certification of Acceptance

We have received, read, and understand all the procedures and criteria associated with the submittal requirements, and understand that all terms and conditions contained herein may be incorporated into a resulting contract. We also acknowledge the receipt of Addenda 1 and Addenda 2.

### Additional Contract Disclosures

**Disclaimer.** In preparing this report, HDR relied, in whole or in part, on data and information provided by the Client and third parties, which information has not been independently verified by HDR and which HDR has assumed to be accurate, complete, reliable, and current. Therefore, while HDR has utilized its best efforts in preparing this report, HDR does not warrant or guarantee the conclusions set forth in this report which are dependent or based upon data, information or statements supplied by third parties or the client.

This report is intended for Client's sole and exclusive use and is not for the benefit of any third party and may not be distributed to, disclosed in any form to, used by, or relied upon by, any third party without prior written consent of HDR, which consent may be withheld in its sole discretion.

Use of this report or any information contained herein, if by any party other than Client, shall be at the sole risk of such party and shall constitute a release and agreement by such party to defend and indemnify HDR and its affiliates, officers, employees and subcontractors from and against any liability for direct, indirect, incidental, consequential or special loss or damage or other liability of any nature arising from its use of the Report or reliance upon any of its content. To the maximum extent permitted by law, such release from and indemnification against liability shall apply in contract, tort (including negligence), strict liability, or any other theory of liability.

# 1

## PROJECT SCOPE OF WORK



Tab 1. Project Scope of Work

# 1.1 APPROACH TO THE SCOPE OF WORK

## We Understand the Challenge

The City of Ocala and SunTran are undertaking a critically important initiative, one that will shape the efficiency, sustainability, and long-term success of the transit system that serves the community today and also prepares it for the future. HDR fully understands the magnitude and complexity of this COA as it will require thorough data collection, route-by-route evaluation, stakeholder engagement, and a clear, implementable path forward for service improvements and a potential transition to in-house operations. Our team is built intentionally to deliver this level of depth, accuracy, and strategic insight.

With a full-service, multidisciplinary team, we have the capacity and capability to meet every requirement outlined in the Scope of Work, from intensive field data collection and rider surveys to service planning, performance standards development, feasibility analysis, and implementation guidance. This is not just what we do - **it is where we excel.**

Our Project Manager, Brian Waterman, PhD, AICP, brings direct, relevant experience having completed the 10-Year Transit Development Plan (TDP) for the City of Ocala, giving him firsthand knowledge of your community, your system, your challenges, and your priorities. Brian knows how essential this COA is, not only for SunTran's operational direction, but for the residents, workers, businesses, and current and future riders who depend on a strong, responsive transit network. His familiarity with Ocala's processes and staff will provide a seamless, efficient, and highly coordinated effort from day one.

To support this effort, HDR formed a team specifically aligned to the COA's unique demands: **experts in transit operations, performance evaluation, mobility analysis, public engagement, GIS, financial modeling, scheduling, and service design.** Each member brings specialized skills essential to delivering the high-quality technical work required.

Should any new needs arise, HDR's 14,000+ professionals allow us to draw on leading practices and emerging trends from across the country while our Florida-based team adapts those insights into locally informed, community-appropriate solutions.

We believe that exceptional outcomes are achieved through collaboration, proactive communication, and a commitment to getting the details right. Our team's work style, supported by years of similar experience, positions SunTran and the City of Ocala to have a responsive, dependable consultant at every step.

We listen, anticipate, and deliver. We understand the challenge. We embrace the responsibility. And we are the team best positioned to guide Ocala and SunTran through a clear, data-driven, and community-focused COA that will strengthen the transit system for many years to come.

## Approach to Scope of Services

Starting below, we've outlined each scope item and addressed our approach and experience with these activities.

### 1.0 STUDY INITIATION/PROJECT MANAGEMENT PLAN AND SCHEDULE

Our project management approach provides the City of Ocala & SunTran with a structured, proactive, and accountable framework to guide the COA. It begins with a **focused internal kickoff meeting** with the project team to explain expectations and identify initial opportunities and challenges. From this session, we will deliver the final scope and schedule that clearly lays out milestones, responsibilities, and the sequencing of tasks, providing the blueprint that drives every subsequent activity and verifies that the COA progresses with clarity, efficiency, and purpose.

To maintain project momentum, our Project Manager will serve as the single point of coordination, providing integration across all technical tasks while delivering consistent communication

## Project Management Approach

Ocala Comprehensive Operations Analysis (COA)



with SunTran staff. We will leverage proven internal management systems to monitor progress, maintain schedule adherence, and quickly address emerging issues. Throughout the effort, our team will track key benchmarks, such as timely task completion, integration of new findings into the work plan, and adherence to the overall project schedule. This will provide the SunTran project manager the confidence that each component is being delivered on time with quality.

Meaningful engagement is central to the COA's success, and we will place strong emphasis on working with the Transit Steering Committee (TSC). Our team will facilitate up to the requested five TSC meetings where each meeting will have clear, visually compelling presentations and concise meeting packages to support productive dialogue. The feedback received during these sessions, supported by input from our public engagement efforts, will be documented and incorporated into the study's analyses and recommendations.

APPROACH TO THE SCOPE OF WORK

Tab 1. Project Scope of Work

This process verifies that SunTran's internal expertise, community priorities, and operational realities remain central to decision-making.

To maintain transparency and support throughout the study, we produce up to twelve monthly progress reports. Each report will summarize completed activities, key results to date, input received from the TSC and the public, any outstanding issues requiring attention, and a lookahead section to present forthcoming work. These recurring benchmarks keep the project on track, reinforce accountability for every task, and verify that SunTran always has a clear view of progress and next steps. Together, these management practices create a deliberate, disciplined approach that guides the COA to timely completion while supporting a collaborative and insight rich process.

#### **Deliverables:**

- Final scope and schedule
- Internal agency kick-off meeting
- Up to five Transit Steering Committee meetings with agendas, presentations, and minutes
- Up to twelve monthly progress reports

#### **2.0 STAFF AND PUBLIC INPUT**

Task 2 is where we roll up our sleeves and immerse ourselves in SunTran's system—its people, its riders, its streets, and its data. These activities create the backbone of the COA, grounding every insight and recommendation in both lived experience and measurable reality. Across Tasks 2.0 through 2.7, we blend traditional engagement, human-centered fieldwork, modern analytics (including Replica, a state-of-the-art practice tool for understanding regional mobility patterns in near real-time), and hands-on route diagnostics to produce the most complete picture of SunTran's network.

HDR's in-house Strategic Communications team will lead community engagement throughout the COA. Our local engagement leads are supported by a national network of graphic design, social media, and digital engagement practitioners. Early outreach will set the stage for meaningful

public input needed to inform the COA throughout our delivery. We will develop and maintain a stakeholder list beyond the TSC to include representation from SunTran's stakeholders including local government, large employers and distribution centers, residents, and local social service providers. The focus of this list will be to share information and opportunities to provide input.

#### **Surveying**

We propose conducting a rider survey through a mix of in-person and online distribution. For in-person surveys, our team will work with SunTran staff to schedule intercepts at both transfer stations (Downtown Transfer Station, Health Department, Silver Springs Walmart) and on-board. An online version of the survey may be promoted through on-board signage, through social media, and through the TSC and other stakeholders.

Online surveys may use map-based tools to help determine the most popular destinations for residents, including potential opportunities for new or intensified service. Common examples of this type of tool include MetroQuest, EngagementHQ, or bespoke apps developed by HDR's Digital Engagement Team.

#### **Public meetings**

Public meetings will be held at strategic times during the COA including early in the process to understand existing conditions, again once initial scenarios are identified, and once more to present recommended changes. Appropriate meeting venues, accessible by SunTran, will be identified and opportunities to "meet people where they are," in places such as Ocala Downtown Square and the College of Central Florida to diversify the feedback received. A virtual public meeting will also be considered to provide access to members of the community that could not, or prefer not, attend in person.

#### **Interviews**

Staff interviews will be scheduled and conducted with a structured format aimed to collect actionable feedback and insights. Interview notes will be summarized and key themes will be identified and incorporated into the planning process.



In order to tie public outreach efforts to the TDP process, the team developed a mini-brand – "Riding into the Future." The mini-brand incorporated SunTran's existing colors on all graphics and promotional items as well as a logo that paid tribute to the area's equestrian history with a horse paving the way into the future alongside a SunTran bus. All materials included the logo for SunTran, the City of Ocala, and the Ocala Marion TPO.

All engagement efforts will be documented within a Technical Memorandum including meeting and interview summaries, outreach collateral and content, and survey questions and results. Additionally, we will proactively work with staff to include available metrics such as website visits and social media engagement.

#### **Deliverables:**

- Up to eight public meetings (if necessary)
- Up to 20 staff interviews

A Technical Memorandum that documents the results of staff interviews and all public meetings will be developed. HDR will develop and maintain project-specific graphical and written material for the website that coincides with the information provided in each of the monthly reports.

Tab 1. Project Scope of Work

### 2.1 Data Collection

Task 2.1 sets the stage for all subsequent technical analysis. Our team collects and organizes all information needed to understand today's network—ridership patterns, stop-level activity, route design, reliability, fare trends, demographics, land use, and system performance. We will look to the City's staff to augment our data collection efforts with assistance expected on the intercept surveys, route-by-route analysis, and community engagement efforts.

To elevate the Origin and Destination (O&D) picture, we will pair the rider survey (Task 2.0) with Replica, a cutting-edge analytics platform that models regional travel patterns at scale. Replica helps us:

- Validate trip patterns observed in the rider survey.
- Fill gaps where in person sampling may be thin.
- Understand regional demand not currently served by transit.
- Identify new markets, desire lines, and potential corridors.

This dual approach delivers a far more comprehensive and resilient O&D dataset than surveys alone. Each component of the data collection plan is delivered as a short, actionable findings brief, keeping the project moving with clarity and transparency.



Public Involvement for Emerald Coast Regional Council (EC) Rider

### 2.2 Review of Existing, Planned, Future Conditions

This task begins with zooming out to understand the world around SunTran. Our team is proficient with analyzing local land use plans, demographic trends, major developments, roadway projects, economic forecasts, and other considerations to build a clear picture of how mobility needs are changing in Ocala and Marion County.

This is where we uncover emerging activity centers, underserved neighborhoods, and cross-jurisdictional travel markets that will shape service recommendations later in the COA.

### 2.3 Service Area Observations

We want to see the system the way riders experience it. Here, our team will drive and possibly ride every route to observe the nuances that data alone can't capture. To make this process consistent and repeatable, we will use a route-by-route performance checklist, documenting:

- High boarding stops and delay points
- Long traffic signals and congested segments
- Turning movement constraints
- Stop placement or spacing issues
- Infrastructure obstacles and pedestrian challenges
- Amenity conditions at stops and transfer points
- Reliability pinch points
- Network connectivity and transfer experience

This checklist gives SunTran a practical tool it can reuse after the COA and reinforces that our service recommendations are grounded in field realities.

### 2.4 Route and Stop-by-Stop Surveys/Data Collection

Here we collect the high-resolution ridership data essential for route-level analysis. Our trained surveyors will ride a statistically valid sample of weekly bus runs to record:

- Boardings and alightings at every stop
- Passenger loads and peak load points

- Travel time by segment

- Trip purpose and transfer behavior
- Rider demographic and trip context

This is the operational "heartbeat" data that powers our Task 3 evaluations.

### 2.5 Data Collection and Supervision and 2.7 Data Processing

SunTran will always know what was collected, where, and why. We take data quality seriously. Our Team provides:

- Surveyor training and daily field oversight
- Redundant staffing to minimize missed trips
- A coordinated schedule aligned with school days
- Immediate daily QA/QC so issues are fixed in real time
- Integration of technology-based data (e.g., APCs) when available

Finally, we convert all raw data into a single integrated database with consistent fields, geocoded coordinates, and clean, ready-to-use metrics. We calculate:

- Ridership by stop, segment, and time of day
- Peak loads and crowding conditions
- Runtime variability and reliability patterns
- Boarding density and stop productivity
- Trip patterns, transfer activity, and O&D flows
- Passenger miles and trip length distribution
- Fare patterns and revenue implications
- Land-use and demographic overlays

These metrics feed directly into Task 3's route-by-route evaluations and ultimately into a data-driven, community-informed service plan.

## 2.6 Quality Assurance

Foundational to HDR's service to you is our Quality Management approach, ranging from the program level reviews all the way down to granular data. Every dataset we collect goes through a robust process that includes multiple sets of eyes accounting for:

- Logic checks (e.g., impossible loads, missing stops)
- Verification of timepoint accuracy
- Cross-checking with Replica-modeled travel patterns
- Rerunning surveys where trips were affected by disruptions
- Spot checks of surveyor performance

The result is a dataset SunTran can trust and rely on for future planning.

### 3.0 DATA ANALYSIS AND EVALUATION OF EXISTING SERVICE

Our approach to Task 3 transforms the informational data received from Tasks 2.1 to 2.3 into clear, intuitive insights to help the project team make confident, data-driven decisions in the subsequent tasks.

We will develop a comprehensive route-by-route evaluation that not only measures current performance but tells the story of how each route functions within the broader mobility network. By combining ridership trends, operational data, customer experience indicators, and demographic context, we create a high-resolution picture of where the system is strong today and where targeted improvements can have the greatest immediate impact.

## Route Profiles

Central to this task is the creation of individual route profiles—high value, visually engaging summaries that give leaders and stakeholders a deep understanding of each route. Each profile includes stop level ridership, helping pinpoint demand patterns and identify underserved segments. We map key destinations

served along each alignment to show how effectively the route supports employment centers, medical facilities, retail areas, schools, and other essential community assets. Travel time evaluations reveal how routes perform throughout the day, highlighting reliability challenges and opportunities to streamline operations.

To support fiscal accountability, each profile includes estimated operating costs, enabling direct comparisons of cost effectiveness across the network. We also integrate demographic indicators, illustrating the concentration of transit-dependent populations served by each route. Together, these profiles form a clear, actionable foundation for improving service. They provide leadership with a transparent, data-rich evaluation that links operational performance with community needs, budget realities, and long-term system goals. With this level of insight, your agency is equipped to make strategic decisions rooted in evidence—whether optimizing existing routes, reallocating resources, or building future service scenarios that resonate with riders and stakeholders alike.

**Deliverable:**

- Existing System Summary with Route Profiles Tech Memo

## 4.0 MOBILITY AND REGIONAL NEEDS ANALYSIS

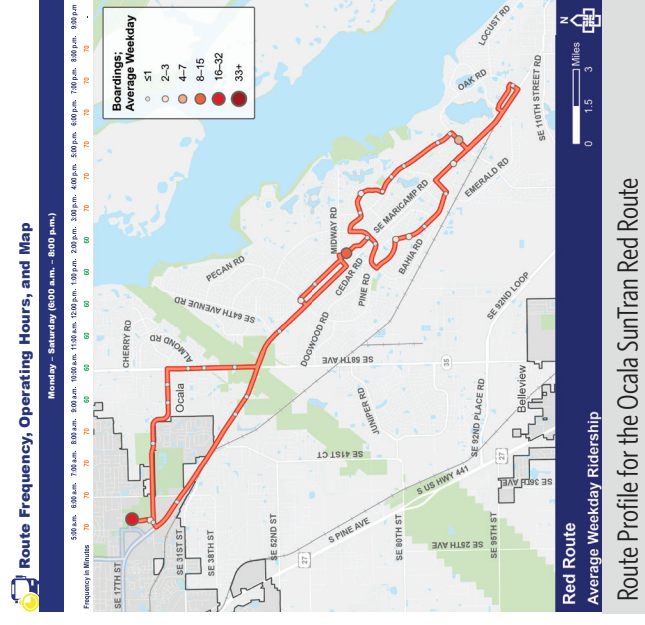
Our team will complete the Mobility and Regional Needs Analysis as a forward-looking market assessment that builds directly on the validated datasets and route-level findings developed in Tasks 2 and 3. Task 4 shifts the focus from how the existing network performs route-by-route to where mobility needs and latent demand exist both inside and beyond the current service area, with an initial assessment of what service types best meet those needs.

In alignment with Task 4's purpose, we will assess the potential for expanded SunTran services within the current service area and into neighboring areas, with particular attention to places where service does not exist or where service levels should be

## Red Route

**Key Points of Interest:** Outboard: Marion County Health Department, Park View Commons Shopping Mall, Forest High School - Ocala, the Rotary Sportsplex, USPS - Ocala, the Silver Springs Stores Walmart, and Lochwood Marine; Inboard: Silver Springs Shores Presbyterian Church, Silver Springs Shores Community Center, Silver Springs Shores Walmart, the Baseline Road Trailhead, Whispering Sands Neighborhood, Silver Springs Marine Institute, and the Marion County Health Department.

**Key Observation:** *[placeholder]*



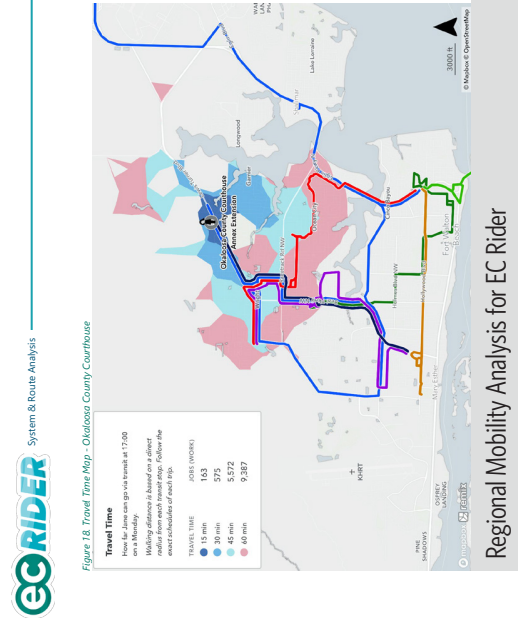
adjusted (decreases, increases, and consideration of flexible/on-demand service). Where feasible, we will identify latent demand by time of day, O&D zones, and user group. Standard transit planning time periods (AM peak, midday, PM peak, evening, and weekend, with late-night evaluated if supported by observed demand patterns) will be used to produce results that can be translated into service planning recommendations.

## Initial Task 4 Development

Task 4 will begin by translating the baseline already established in earlier tasks into a “markets-and-needs” framework. The latest U.S. Census/ACS updates will be analyzed to identify potential rider markets that presently have inadequate transit service, focusing on older adults, people with mobility limitations, low-income households, and other transit-dependent groups, and commuter travel markets while accounting for Title VI considerations. This demographic assessment will be paired with the existing route and corridor profiles developed in Task 3, which already document where SunTran’s current services are productive and where they are constrained. In this way, Task 4 uses Task 3’s technical memorandum as the definitive record of “existing service performance and issues,” and positions Task 4 to focus on identifying underserved markets and expansion opportunities rather than re-evaluating each route’s internal operating characteristics.

## Identifying Latent Demand by Time Of Day, O-D Zones, and User Group

Our team will use the survey and APC datasets from Task 2 and Task 3's route-by-route findings to identify and describe latent



demand in a practical, decision-oriented way. Geocoded O&D information, trip purpose, trip length, and transfer patterns will be used to map key travel desire lines and highlight where riders are trying to travel today, including markets that require multiple transfers or that show strong directional demand during specific time periods. This analysis will be segmented by time of day and, where feasible, by user group (e.g., transit-dependent riders, commuters, students, service-trip markets), so SunTran can understand not only where unmet needs exist, but also when those needs occur and which rider groups are most affected.

To strengthen the latent demand picture, HDR will interpret demand patterns in the context of service quality constraints documented in Tasks 2 and 3. For example, passenger load profiles relative to capacity, schedule adherence and headway variability, and run-time variability by time period will help distinguish between markets that are fundamentally low-demand and markets where ridership is likely suppressed by reliability, connectivity, span of service, or stop access limitations. Similarly, the amenity inventory (transfer centers, shelters, bays), traffic and turning movement constraints, and stop spacing information already assessed in Task 3 will be used to ground-truth what service concepts are feasible and what supporting improvements may be required. This integration verifies that Task 4's recommended service opportunities are rooted in both market need and operating reality.

### Corroboration Through Field Work, Requests, and Interviews (as Required)

Consistent with Task 4's methodology, HDR will corroborate analytical findings through targeted field investigations, public service requests, and interviews with SunTran management and front-line personnel. Field investigations will be focused on the highest-opportunity underserved areas identified through the combined market and O&D analyses, particularly where Task 3 highlighted operational or infrastructure constraints that could influence service design. These visits will help to

confirm stop accessibility, transfer functionality, pedestrian connections to key generators, and on-street operational feasibility factors. Interviews with management and front-line staff will be structured to confirm recurring service requests, observed time-of-day demand issues, and the practicality of potential service adjustments and new service types.

Our team's public engagement approach will accommodate a range of inputs (email, website submissions, call center logs, social media, and any additional channels identified). Feedback will be normalized into consistent categories such as coverage gaps, frequency needs, span of service, reliability concerns, transfer experience, stop access/amenities, safety, and fare-related issues, and geocoded where feasible to stops, corridors, or analysis zones. Time-of-day references in comments (e.g., "late-night," "weekends," "commute times") will be tagged so public input can be compared directly to time-period demand patterns from the survey/APC dataset.

## Comparing Existing and Potential Markets

Task 4 requires comparing demographic characteristics of areas with high transit ridership and identifying areas with similar characteristics that are presently underserved. We will use the ridership hotspots and strong-performing segments already surfaced through Task 3's route and corridor profiles as a starting point, then analyze the demographic and land use characteristics associated with those high-performing areas.

We will identify other locations within the current service area and in neighboring areas that share similar “ridership-supportive” characteristics (including transit dependency factors and key trip generators) but have inadequate service coverage, span, frequency, or connectivity. This approach provides a transparent, defensible way to identify credible candidates for service expansion or new service types.

## Regional Needs Beyond the Current Service Area

To meet the task requirement to evaluate demand outside SunTran's present service area, HDR will examine commuting patterns and regional travel markets using the MPO's long-

Tab 1. Project Scope of Work

range plan as a primary reference, supplemented by the most recent SunTran TDP (completed by HDR) and other applicable regional studies. This regional lens will help identify cross-boundary travel markets and key trip generators with potential latent demand, as well as practical “gateway” locations near the edge of the current service area where new connections, mobility hubs, or flexible/on-demand service could efficiently link emerging markets to SunTran’s fixed-route network.

### Translating Findings Into Short-Term and Mid-Range Recommendations

We will conclude Task 4 by translating the market assessment into distinct short-term and mid-range recommendations.

**Short-term recommendations** will focus on actionable improvements that respond to demonstrated needs by time period and user group. These may include targeted frequency or span adjustments, transfer and connectivity refinements, and prioritized stop/amenity enhancements at high-need locations, while factoring in the route-by-route operational constraints and opportunities identified in Task 3. **Mid-range recommendations** will focus on scalable strategies such as corridor expansions, new service into underserved markets, structured application of flexible/on-demand services in appropriate zones, and regional connectivity concepts. These recommendations will be derived by linking market characteristics, O&D patterns, time-of-day demand, and feasibility considerations.

### Deliverables:

Results of the Mobility and Regional Needs Analysis will be incorporated into the project report and include:

- A mobility and regional needs market assessment within SunTran’s service area and in neighboring areas addressing housing, employment, transit dependency, commuting patterns, origin–destination findings (as available), key trip generators, LRTP/TDP consistency, and Title VI considerations.

- Distinct short-term and mid-range recommendations identifying opportunities for service increases/decreases, expansion into new areas, and optimal locations for new service types (including flexible/on-demand where appropriate).
- A matrix comparing analysis results with public suggestions/comments, clearly differentiating needs within the current service area versus neighboring areas, and documenting how public input corroborates, refines, or adds context to the data-driven findings.

## 5.0 PERFORMANCE STANDARDS & POLICIES

We understand that performance standards are essential to elevating SunTran’s service quality, strengthening public trust, and guiding investment choices. We also recognize the importance of creating a framework that is both rigorous and practical, one that your team can confidently apply, communicate, and evolve over time.

Our approach builds on the data, insights, and public input collected throughout earlier tasks, blending SunTran’s operational realities with national best practices to create a cohesive, easy to use performance framework that drives prioritization and implementation.

### Metrics & Standards

Drawing from HDR’s proven transit services planning experience, SunTran’s goals, and your emerging service vision, we will develop a suite of key performance metrics organized around the categories critical to SunTran’s mission such as productivity, reliability, customer experience, safety and more. We will incorporate policy-driven measures like service span thresholds, headway standards, transfer expectations, and route tiering thereby enabling SunTran to have clear, documented policies guiding decisions across service types.

### Target Setting & Practical Application

To catalyze real improvement, we will collaborate with SunTran to set targets that reflect current system conditions and peer



comparisons while remaining achievable and motivating. We will also create simple reporting tools such as scorecards and dashboards that distill complex data into actionable insights. Metrics will be paired with clear guidance, clarifying when and how service adjustments should occur. Our approach makes performance not just a conceptual benchmark but a reliable, everyday decision-making resource, helping your team shape SunTran’s future.

### Policies Supporting Performance

We will help SunTran develop clear, practical service performance policies including service span policies, frequency and headway expectations, route tiering, fare and transfer policies, and safety and maintenance standards. These policies bolster consistency, transparency, and accountability, giving SunTran a stable foundation for managing system growth, adjusting under-performing services, and communicating decisions to your governing board, partners, and the public.

### Planning and Compliance Integration

We will develop a concise crosswalk showing how each performance measure supports SunTran’s broader planning and compliance responsibilities, including the TDP, Title VI Program, TAM Plan, and PTASP. This integration creates a

single, coherent narrative connecting daily service performance to long term system stewardship and federal readiness. The result is a performance framework that SunTran can own, communicate, and use to continuously improve service for the community.

#### Deliverables:

- Our team will develop a Draft and Final Technical Memorandum with recommendations on optimal service and performance measures for SunTran's use. The recommendations will be informed by the agency's established performance and productivity policies and standards and national best practices, providing clear guidance for adjusting service where needed based on the findings of this COA effort.

### 6.0 SERVICE IMPLEMENTATION PLAN

Our team recognizes the critical importance of bridging what can be a challenging gap between the development of a service plan and the implementation of that plan to deliver improved service to transit riders. For this reason,

we see the Service Implementation Plan as a vital step in translating the needs assessment (Task 4), the route-by-route evaluation of existing service (Task 3), the validated survey/APC dataset and technical findings (Task 2), and the service performance standards and measures (Task 5) into a detailed, implementable service plan for two time horizons. The intent of Task 6 is not simply to describe what should change, but to provide SunTran with a practical roadmap that includes schedules (run cuts), vehicle and workforce requirements, infrastructure and technology needs, and clearly staged implementation steps all supported by defensible cost estimates and a monitoring framework aligned with the performance standards developed in Task 5.

In keeping with the Task 6 purpose, we will summarize the recommended service plan for two time periods: a Short-Term Priority System Improvement Plan (Years 1–2) and a Mid-Range Optimized System Investment Plan (Years 3–5). Importantly, the Task 6 approach will make implementation “real” by specifying, route-by-route and corridor-by-corridor, what changes occur, when they occur, what resources they require, and how success will be measured.

#### 6.1 Short-Term Recommendations (Years 1–2) — Priority System Improvement Plan

We see the short-term plan as the primary implementation effort, consistent with the scope, and will organize it to support careful deployment, performance monitoring, and iterative refinement over a two-year period. The short-term plan will focus on changes that improve the overall efficiency and responsiveness of the existing network, particularly those that can be implemented using existing resources (budget-neutral) or with limited incremental investment, while establishing the operational foundations for larger mid-range improvements.

We will work with SunTran's team to stage the recommendations in a way that works for the organization and that considers the full range of issues needing attention to deliver the service changes effectively and with minimal disruption for riders.

### Translating Prior Task Findings Into Route and Corridor Proposals

Building on Task 3's route-by-route profiles and layered assessment of strengths and weaknesses and the underlying survey/APC, farebox, and schedule data, we will develop a set of service proposals that address the specific service issues documented in Tasks 2–5. These proposals will be structured around the key factors that most directly improve route and cost efficiencies, such as adjusting headways by time period, refining span of service, simplifying alignments to improve directness and reliability, improving transfer design and timed connections, and recalibrating schedules where run-time variability and schedule adherence issues have been identified. Where Task 4 and Task 5 indicate that flexibility would better match demand patterns or improve coverage efficiency, the short-term plan will incorporate practical flex/on-demand concepts that integrate with the fixed-route network.

#### Defining “Optimal Routing And Service” in Implementation-Ready Terms

For each route or service and for each day-of-week pattern, our team will specify the operational parameters in a way that can be readily implemented by scheduling and operations staff. This will include the definition of service periods, frequencies by time period, round-trip running times, timepoint spacing, and trip distances, along with the associated service hours and miles. HDR will also identify vehicle requirements by time period and propulsion system, with clear documentation of how fleet availability, capacity needs, and service reliability considerations influence those requirements. Where interlining improves cost efficiency and vehicle utilization, HDR will propose feasible interlining combinations that are consistent with SunTran's dispatch and scheduling practices documented in Task 3.

#### Integrating Flex/On-Demand Services, Technology, and Regional Connections

Where the market assessment and performance standards support it, HDR will incorporate flex routing/on-demand



Brian Waterman engaging with customers about local service challenges - Mississippi DOT State Transit Plan & Intercity Bus Study

Tab 1. Project Scope of Work

services or microtransit as a complementary layer—particularly for lower-density coverage needs, first/last-mile connections to trunk services, or time periods where fixed-route productivity is unlikely to meet performance standards. In these cases, HDR will define service zones, operating parameters, and integration points with fixed routes and transfers. The short-term plan will also identify near-term technology opportunities such as customer information enhancements, stop-level information upgrades, scheduling/dispatch process refinements, or ITS improvements that can support reliability and customer experience. Where SunTran routes operate on or connect to regional corridors, we will document how proposed changes integrate with other transit modes or services and identify the operational and coordination steps needed to support those connections.

#### **Fleet, Facilities, and EV Readiness Considerations**

Recognizing that short-term service improvements may impact fleet assignment, charging strategy, and facility needs, HDR will incorporate required fleet and infrastructure considerations into the plan. This includes identifying vehicle requirements by propulsion type and time period, and documenting EV charging needs where applicable. We will also highlight any facility or equipment needs that must be addressed for the short-term plan to be sustainable (e.g., space constraints, yard circulation, and maintenance capacity considerations).

#### **Costing, Scenario Framing, and Budget-Neutral Delineation**

We will again work closely with the SunTran team to match the recommendations and their timing with budget availability as we develop total operating and capital cost needs for the short-term recommendations and will clearly separate changes into two categories:

- 1) Budget-neutral changes within existing resources, including service reallocations, interlining, scheduling efficiencies, and targeted productivity-driven adjustments
- 2) Changes requiring additional resources, including incremental service hours, fleet expansion, technology

investments, charging infrastructure, and amenity or facility improvements beyond routine replacement.

Costs will be presented as transparent, defensible estimates tied to service hours/miles, fleet requirements, and identified capital needs. Where multiple short-term scenarios are considered, we will provide a clear comparison of cost and performance implications, aligned with the service performance standards and measures developed in Task 5.

#### **Performance Monitoring and Feedback Loop (Linking Directly to Task 5)**

A core feature of the short-term plan will be the monitoring framework that supports staged implementation. We will define how each grouping of changes will be monitored against the adopted performance standards, what data sources will be used, and what thresholds or triggers would prompt refinement. This allows SunTran to implement improvements, observe outcomes, and adjust with confidence over the two-year period.

#### **Short-term Deliverable:**

HDR will produce a System Improvement Plan that provides implementation-level detail. The plan will include:

- Run cuts for each route and for logical groupings of changes (enabling phased roll-out)
- Driver/staffing requirements for each run cut and each recommended improvement
- Graphical and GIS maps/layers illustrating proposed network, corridor changes, and service-type applications
- Tables and descriptive narrative documenting service parameters, changes by day/time period, and rationale
- Proposed new routes or routing changes where recommended
- Policy recommendations needed to support implementation (service policies, stop spacing, etc.)
- Estimated capital and operating costs for each recommendation, clearly delineating budget-neutral actions versus those requiring additional resources



San Diego Metropolitan Transit System (MTS) Zero Emissions (ZEB) Bus Program

- Documentation of fleet requirements (including EV charging needs), facilities, equipment, technology, and integration needs to implement the plan successfully

#### **6.2 Mid-Range Recommendations (Years 3-5) — Optimized System Investment Plan**

Our team will develop the mid-range plan as a staged, scalable program of service and capital investments that builds upon successful implementation of the short-term Priority System Improvement Plan. Consistent with the scope, mid-range recommendations will address increases in service levels (headways, span), routing modifications, new routes or service types, and expansion into neighboring areas, with the expectation that many mid-range improvements will require additional operating and capital resources.

#### **Staging Mid-Range Improvements to Follow Short-Term Implementation**

The mid-range plan will be informed by the changes introduced in Years 1-2. We will identify which mid-range actions are enabled by short-term improvements (e.g., network simplification that creates operating efficiencies, transfer restructuring that improves connectivity, or early flex/on-demand pilots that mature into permanent service). This

Tab 1. Project Scope of Work

- Transit centers, transfer facilities, and mobility hubs
- Park-and-ride lots where regional travel patterns support them
- Fleet growth and/or fleet transition needs (including EV charging infrastructure expansion)
- Facility needs where service growth outpaces existing capacity
- ITS and technology investments that support reliability, customer information, and system management
- These needs will be presented as an integrated program that links each capital element to the service changes it enables and the performance outcomes it supports.

### Costing and funding approaches

HDR will develop operating and capital cost estimates for each mid-range recommendation and will identify plausible funding approaches for new or expanded services. Rather than treating funding as an afterthought, HDR will align proposed funding approaches that match the nature of the investment and distinguish between operating support, one-time capital, technology/ITS investments, and fleet/facility programs.

Where applicable, we will identify packaging strategies that increase competitiveness for grant funding and improve feasibility (for example, pairing service expansion with mobility hub improvements, stop accessibility upgrades, or electrification-supporting infrastructure where consistent with local priorities).

### Mid-range Deliverable:

HDR will produce a final Optimized System Investment Plan that includes:

- Graphical and GIS maps/layers depicting the mid-range network and expansion concepts
- Tables and narrative descriptions of proposed modifications, new routes, and service types
- Proposed policy recommendations necessary to support sustainable growth and consistent performance

staging approach reduces implementation risk and works to develop the system in a coherent way rather than through disconnected initiatives.

### Using Latent Demand and Performance Standards to Target Expansion

The mid-range plan will draw heavily from the project's latent demand findings and market assessment (Task 4) and will apply the performance standards and measures (Task 5) as a decision filter for prioritization. This approach will work to offer expanded service targeted to markets with clear need and a credible path to meeting service performance expectations over time. Where transit access priorities and transit dependency are high, we will frame mid-range investments in a way that balances mobility need, productivity goals, and resource realities.

### Capital Resource Needs and Supporting Infrastructure

Because mid-range improvements frequently require enabling investments, our team will identify capital needs associated with expanded service, including but not limited to:

- Bus stops and passenger amenities (shelters, pads, lighting, accessibility improvements)



Kansas City Streetcar - HDR Supported Grant Recipient

- Estimated capital and operating costs for each change that could be implemented within the next 3–5 years
- Identification of funding approaches for new or expanded services and associated capital needs
- Clear articulation of dependencies and staging, showing how mid-range initiatives are built from the short-term Priority System Improvement Plan

### How Task 6 stays tightly connected to Tasks 2-5 (and avoids duplication)

- **Task 6** is intentionally positioned as the implementation step that converts prior analyses into an actionable plan
- **Task 2** provides the validated survey/APC dataset and initial findings that underpin demand, O-D patterns, and time-of-day needs.
- **Task 3** provides route-by-route and corridor-level evaluations of productivity, efficiency, effectiveness, scheduling/dispatch practices, capacity utilization, and operational constraints that inform what is feasible and where efficiencies can be gained.
- **Task 4** identifies mobility needs and latent demand inside and outside the service area, including disadvantaged populations, commuter markets, and potential locations for new service types.
- **Task 5** establishes the service performance standards and measures that guide prioritization and defines how implementation success will be monitored.

By grounding Task 6 in this progression, we will develop the short-term plan to address known service issues and efficiency opportunities and have the mid-range plan strategically expand service in response to demonstrated market needs and latent demand while maintaining accountability through measurable performance standards.

## 7.0 IN-HOUSE OPERATIONS AND MAINTENANCE COST AND FEASIBILITY STUDY ANALYSIS

Prior to the expiration of the RATP DEV USA, Inc. (RATP DEV) SunTran Transit Management Services contract in October 2027, SunTran and the City will need to determine the preferred delivery model for providing fixed route and paratransit services. The following tasks will provide the quantitative and qualitative research and analysis needed to help leadership identify which model—in house, hybrid, or continuation of the current approach with performance enhancements—offers the best long term value and highest level of customer service.

### 7.1 Data Collection and Baseline Definition

We will develop an Operations & Maintenance (O&M) cost model to reflect SunTran's current Transit Management Services agreement calibrated to the FY 2025 actuals. Our team will also generate costs based on annual revenue hours for fixed route service and annual revenue miles for ADA services. Historical and current invoices will help identify key O&M cost drivers including labor, benefits, fuel, parts, administrative overhead and insurance.

We will generate annual cost estimate of costs associated with SunTran/City staff to provide oversight and management of the Transit Management Services contract and combine with RATP Dev's annual cost to provide a total cost estimate for contracting out transit services.

We will compare SunTran's historical annual O&M cost trends with up to six peer systems, reflecting a combination of systems that contract out transit services and utilize in-house staff for day-to-day operations and maintenance to identify potential industry trends that SunTran's current delivery model is or is not reflecting.

#### Deliverables:

- Baseline O&M cost analysis and contracted services O&M cost model
- Peer system analysis
- Methodology and Results Technical Memorandum

### 7.2 In-house Cost Model Development

We will develop a fully allocated O&M cost model that reflects FTA guidance and industry standards for unit cost drivers for vehicle operation, vehicle maintenance, facilities maintenance and administrative expenses.

- Develop staffing plan built on RATP DEV's current organizational chart and potentially modified based on additional discussion with staff and peer systems.
- Develop annual cost estimates based on a combination of existing expenses incurred by RATP DEV and additional research of peer systems that utilize in-house staff to operate and maintain transit service.

#### Deliverables:

- Fully allocated In-house cost model
- Methodology and Results Technical Memorandum

### 7.3 Delivery Cost Comparison

Using existing and recommended service levels as defined in the Service Implementation Plan and the O&M cost models developed in the prior two tasks, compare costs for alternative service delivery models, including the current RATP Dev agreement, an all-in-house staff approach, and a hybrid model where specific services or functions are contracted out but the majority of operation and maintenance functions are completed using in-house staff.

Analysis will include a combination of annual O&M cost estimates and a comparison of service effectiveness and efficiency metrics including cost per revenue hour, cost per revenue mile, and cost per passenger trips.

#### Deliverable:

- Delivery Cost Comparison Results Technical Memorandum



LYNX, SR 50 BRT Analysis, Orlando, FL

Tab 1. Project Scope of Work

#### 7.4 Operational and Organizational Impact

We will conduct a risk workshop with SunTran/City staff subject matter experts to develop a risk register and define potential mitigation measures for topics that would include but not limited to the following:

- Existing staff capacity and experience
- Available local labor force (administrative, operations, maintenance, etc)
- Recruitment and training
- Workforce Transition Implications, including Federal Section 13 (c) Requirements
- Existing and projected financial capacity
- Facility and equipment readiness
- Insurance requirements

#### Deliverable:

- Risk Workshop Summary Memo and Risk Register

#### 7.5 Recommendations and Implementation Roadmap

Our team will generate a technical memorandum that summarizes results of prior tasks and provides an action plan for moving forward with the recommended delivery model. The technical memorandum will include a feasibility conclusion, recommendation on the preferred delivery model, an Action Plan that details the next steps for implementing the recommended delivery model, including staff roles and responsibilities, schedules for actions and approvals, and the anticipated fiscal impact, and recommended performance and financial metrics to monitor service effectiveness post-implementation of the preferred delivery model.

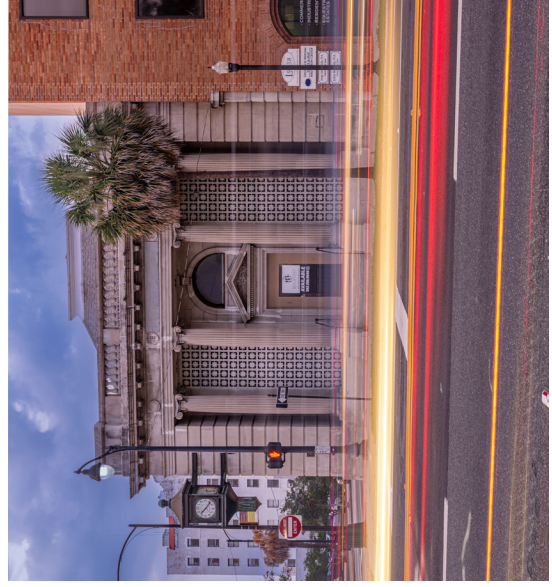
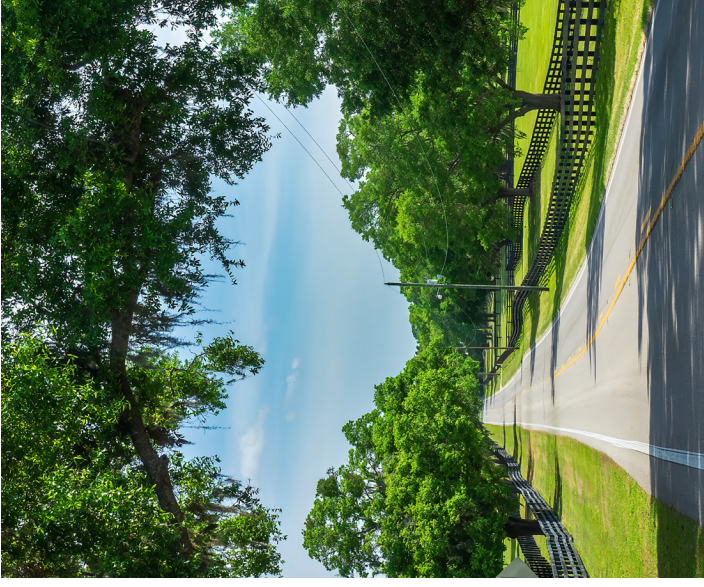
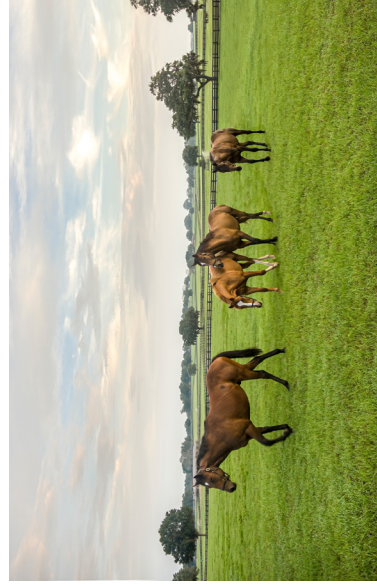
#### Deliverable:

- Recommendations and Implementation Roadmap Technical Memorandum

#### 8.0 FINAL COA REPORT, PRESENTATION OF FINDINGS AND EXECUTIVE SUMMARY

Under Task 8, our team will synthesize and summarize all analysis, engagement feedback, and service evaluation findings into a clear, well-structured Final COA Report that will guide your agency's next phase of improvement. The report will be crafted to be both technically sound and easy for a variety of audiences to understand, presenting key insights, performance trends, and recommended strategies in a visually compelling (and Section 508 compliant), and decision-ready format. We will also prepare a concise Executive Summary that will highlight the most critical findings, recommendations, and key implementation actions allowing leadership and stakeholders to quickly grasp the system's opportunities and strategic direction.

We will deliver a polished presentation of findings that will depict existing conditions, goals and objectives, scenario evaluations, and recommended service changes. This presentation will be designed to support meaningful dialogue with elected officials, advisory committees, and community partners. To further support transparency and stakeholder alignment, we will provide up to eight additional briefings, verifying that your agency will be equipped to effectively communicate the COA's results across all governing bodies and public facing platforms.



# 2

## PROJECT TEAM COMPOSITION, EXPERIENCE, QUALIFICATIONS, AND PAST PERFORMANCE



Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

## 2.1 TEAM QUALIFICATIONS

Our team brings deep experience supporting transit operations across the region. With **Project Manager Brian Waterman, PhD, AICP**, at the helm of this scope of work, the City can expect professional leadership, expertise, and an understanding of the complexities of transit planning. Brian's previous experience working with both the City of Ocala and SunTran enables him to effectively manage the process for considering transit reroute options that match your needs and goals for the community. He brings his understanding of how the SunTran system has evolved over time - as the community's needs continue to grow and change. Brian's ability to analyze complex transportation systems, identify areas for improvement, and develop effective solutions will support the County in optimizing its transit services.

In addition, our team members have a broad background and strong understanding of what agencies need from both traditional and innovative transit service models—and how to craft strategies and solutions that deliver results.

## 2.2 CUSTOMER SERVICE PHILOSOPHY

**Together, we make great things possible.**

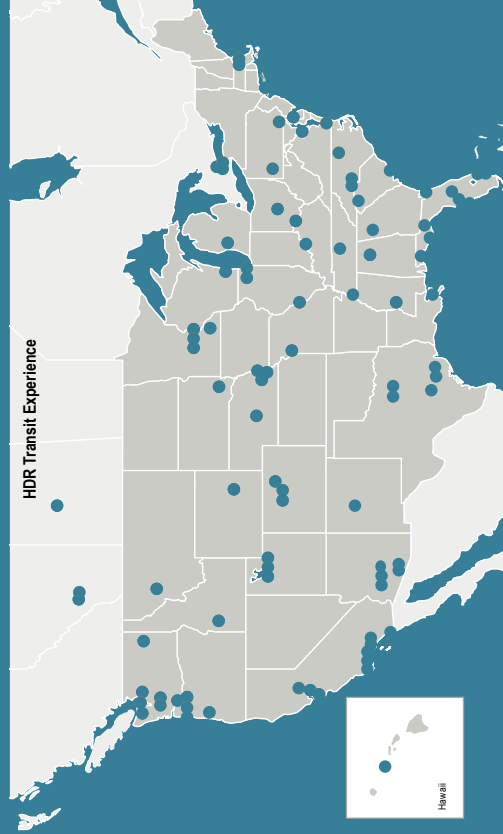
We partner with you to push the boundaries of what's possible. Identifying your unique needs, we pull together the top minds and resources around the globe to design the smartest solutions for your challenges. Our all-service teams are custom-fit to each project, taking it from small detail to great achievement and building strong relationships along the way.

## HDR TRANSIT PLANNING AND DESIGN SERVICES

Our multidisciplinary team are well-equipped to handle all aspects of all aspects of transit planning, from bus stop placement and required amenities to network redesigns, facility planning, and emerging mobility modes.

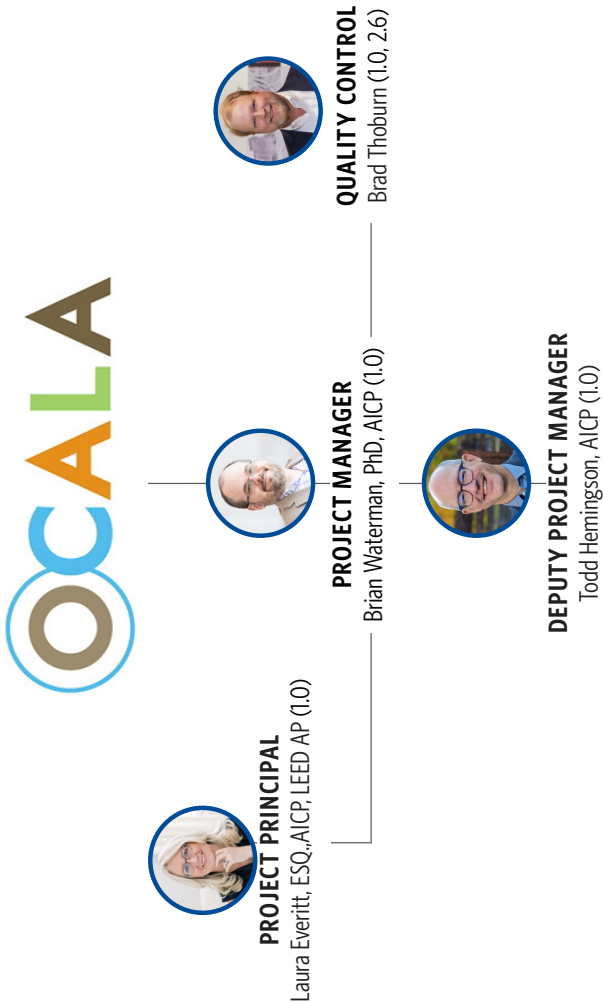
### Transit Planning

- Corridor and Long Range Plans
- Ridership Forecasting
- Stakeholder Outreach
- Station Area Planning
- Transit-Oriented Development
- Bus and Rail Facilities
- Funding and Grant Assistance



Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

## 2.3 ORGANIZATIONAL CHART



| REVIEW OF EXISTING PLANS & CONDITIONS                                                                              | OPERATIONS, PLANNING, & ANALYTICS                         | ON-THE-GROUND TEAM                                               | O&M FEASIBILITY & ORGANIZATIONAL DESIGN                                    |
|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------------|----------------------------------------------------------------------------|
| Joshua DeVries, AICP (2.1, 2.2, 2.3)                                                                               | <b>Service Planning</b><br>Dave Toffen (4.0, 6.0)         | <b>Public Involvement</b><br>Stephen Alianiello (2.0)            | <b>Transit Finance / Cost Modeling SME</b><br>Tim Thornton (7.0)           |
| <b>MARKET &amp; NEEDS / STANDARDS &amp; POLICY</b><br>Levi Hannon, GISP (3.0, 4.0)<br>Savannah Hardisky (3.0, 4.0) | <b>Data Analytics</b><br>Ke Zhou (2.7, 3.0)               | <b>Title VI and Equity Analyst</b><br>Julie Gilliland (3.0, 6.0) | <b>Performance Standards</b><br>Jason Kelly, CPM (5.0)                     |
|                                                                                                                    | <b>Scheduling/Run Cutting</b><br>Amber Lindsay (3.0, 6.0) | <b>Field Data Collection</b><br>Victor Condezo (2.4, 2.5)        | <b>Maintenance &amp; Fleet SME</b><br>Elena Wilken (7.0)                   |
|                                                                                                                    |                                                           |                                                                  | <b>HR/Labor &amp; Org Design SME</b><br>Elena Wilken (7.0)                 |
|                                                                                                                    |                                                           |                                                                  | <b>Safety &amp; Compliance SME</b><br>Micah Gilliom, AICP, TSSP (6.0, 7.0) |

\*Scope items covered by staff are shown in parenthesis

# 2.4 Resumes



**Brian Waterman, PhD, AICP**  
PROJECT MANAGER

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

| FIRM NAME                                                                                                                                                                           | CERTIFICATIONS                                       | INDUSTRY TENURE |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|-----------------|
| HDR                                                                                                                                                                                 | American Institute of Certified Planners, No. 021136 | 24 Years        |
| EDUCATION                                                                                                                                                                           | PROFESSIONAL AFFILIATIONS                            |                 |
| PhD., Transportation Planning, Florida State University, 2024<br>M.S., Urban & Regional Planning, Florida State University, 2005<br>B.S., Geography, Florida State University, 2001 | American Planning Association                        |                 |

Brian is experienced in urban mobility planning including transit route design and operation, emerging transportation technologies, policy development, research, and engagement with stakeholders and community partners. He is passionate about improving urban transportation systems to meet diverse community needs. Brian has led multiple studies including an ADA Bus Stop Accessibility Plan, Transit Development Plan update and Comprehensive Operations Analyses. His experience includes conducting transportation studies, analyzing transit systems, and identifying improvements to transit operations and route design. He has led or contributed to numerous national-level transportation studies and programs, including transit technology, electric vehicle impacts, and transit development plans. Brian is a member of the Transportation Research Board (TRB) Transit Standing Committee on Transit Operations and on the "Impacts of Bus Route Redesigns" Research Panel.

## RELEVANT PROJECT EXPERIENCE

**City of Ocala/SunTran Transit Development Plan, Ocala, FL Project Manager.** HDR partnered with Foursquare to develop a long-term transit plan for a rapidly growing community in central Florida. Due to the rural nature of the community and the growth in the outlying area, the goal of the TDP was to implement new mobility options, such as microtransit, to augment the fixed route system and provide access to the

emerging population centers in the county. To support these efforts, detailed route analytics, growth analysis, and an extensive public engagement campaign were used to gain full understanding of the system and develop strategies to meet currently unserved areas of the community. The TDP received high praise from the transit director and is looking forward to implementing one or more of the microtransit service options.

### EC Rider Comprehensive Operations Analysis, Okaloosa County, FL

**Project Manager.** Located along the Florida Gulf Coast and home to two military bases, EC Rider provides transit service to the cities of Fort Walton Beach and Destin as well as other communities. Plagued by inefficient operations and potential loss of funding, Brian's team was brought in to redesign their system to improve operations and attract new ridership. The resulting changes included streamlining the routes, identifying new stop locations, expanding service in key areas, and proposing Mobility on Demand (MoD) along the beach.

### Bay Town Trolley, Comprehensive Operations Analysis and Transit Development Plan Major Update, Panama City, FL Project Manager.

HDR is working on systematic review of the Bay Town Trolley Transit System to gain an understanding of how well it is delivering services to its customers, identify route restructuring and infrastructure placement opportunities to bring service back to pre-Hurricane Michael levels, and developing a 10-year strategic transit plan. The work will

include significant public engagement, developing route profiles, and identifying opportunities for expansion.

### Innovation in Transportation Network Design, PhD Program of Study

**PhD Study.** Emerging mobility technologies (autonomous/connected/shared vehicles, micromobility, and MoD) have different impacts on the transportation network, expand opportunities to new users, and affect travel behavior in new ways. However, how we plan and design the urban transportation network is still built around the personal automobile. Brian's dissertation is on what changes need to be made to the urban transportation system and planning process to effectively integrate these new mobility options.

### FDOT Public Transit Office (PTO), Transit and Intermodal Support, Tallahassee, FL

**Deputy Project Manager.** HDR has held this contract since 2018, assisting the Public Transit Office (PTO) with grant applications and in researching and developing policies to support the growth of transit in the state. As Deputy Project Manager, Brian serves as the local point of contact with the agency and has led projects to improve access to residents of affordable housing communities, developing procedures to submit federal and state grants, and evaluating the Transportation Disadvantaged program.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



**Todd Hemingson, AICP**  
DEPUTY PROJECT MANAGER

**FIRM NAME**  
HDR

**EDUCATION**  
M.S., Community & Regional Planning, University of Texas, 1992  
B.A., Geography, University of Texas, 1989

**CERTIFICATIONS**  
American Institute of Certified Planners, No. 013603

**INDUSTRY TENURE**  
30+ Years

Todd has 30+ years of broad-based transportation planning experience, with a focus on public transportation and mobility planning. Before joining HDR, Todd spent 13 years as the VP of Planning & Development at Capital Metro in Austin. He led the agency's planning, analysis, sustainability, and transit-oriented development departments. Todd has led three comprehensive operational analyses/transit network redesign efforts at three different transit agencies; led the planning and implementation of two new BRT lines funded with a \$38M Federal grant; initiated an innovative transit speed and reliability program; and managed a diverse group of projects and initiatives to optimize public transportation services. He excels at synthesizing complex technical information and conveying it effectively through written reports and presentations to stakeholders, elected officials, and the general public. Todd is recognized as a transit leader, having participated in more than a dozen Transit Cooperative Research Program studies, graduated from the APTA Transit Leadership Program, and served as a member of numerous APTA and TRB committees.

RELEVANT PROJECT EXPERIENCE

**City of Ocala, City of Ocala/SunTran Transit Development Plan, Ocala, FL**

**Transit Planning Lead.** HDR led the efforts to develop a long-term transit plan for a rapidly growing community in central Florida. Due to the rural nature of the community and the growth in the outlying area, the goal of the TDP was to

implement new mobility options, such as microtransit, to augment the fixed route system and provide access to the emerging population centers in the county. To support these efforts, detailed route analytics, growth analysis, and an extensive public engagement campaign were used to gain full understanding of the system and develop strategies to meet currently unserved areas of the community. The TDP received high praise from the transit director and is looking forward to implementing one or more of the microtransit service options.

**Nashville MTA, Transportation Improvement Plan, Nashville, TN**

**Transit Planning.** For more than a decade, the City of Nashville studied and proposed transportation improvements to provide more reliable, safe and efficient mobility options to accommodate its growing economy and population. Numerous transportation plans were created but without full advancement or funding, traffic congestion in the region continued to worsen. WeGo and the City of Nashville selected HDR in December 2023 to develop a new transportation improvement plan that incorporated the identified solutions from prior plans. It was important that the new TIP addressed the needs of a broad and diverse community of stakeholders and that it delivered the maximum return on investment for all Nashvillians.

**North Central Texas Council of Governments, Collin County Transit Study, Collin County, TX**

**Planning Lead.** Todd led county-wide transit planning component of long range planning effort assessing the

current and future transit opportunities and recommending service, funding and governance approaches for the future. Work included developing a comprehensive transit needs assessment; transit market analysis; land-use analysis; scenario development and evaluation; funding plans and implementation strategy development.

**Capital Metro Transportation Authority, Project Connect, Austin, TX**

**Chief Planner.** Austin residents approved a comprehensive, sweeping transit plan that will provide new travel options throughout the city, manage congestion, increase mobility, and improve environmental outcomes. HDR started early to help CapMetro frame the program and the strategy - we served as program manager/owner's representative through the program development and funding process and will continue to do so through the life of the program, which is expected to stretch into the next decade. Project Connect will provide two light rail lines, operating free from traffic, which will link key destinations throughout Austin and provide commuters and visitors with a mode of travel that currently doesn't exist within the city. It also includes bus rapid transit, park and bus rides, a new fleet maintenance/admin facility, a new downtown transit tunnel, as well as some other customer-focused technology improvements. The expanded transit system will help manage congestion and environmental impacts of increased traffic by providing more choices for more people, allowing them to connect with more places.



**Laura Everitt, Esq.**  
PROJECT PRINCIPAL

| FIRM NAME                                                                                                                                                                     | CERTIFICATIONS                                                                                                | INDUSTRY TENURE            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|----------------------------|
| HDR                                                                                                                                                                           | American Institute of Certified Planners, No.20011<br>DEI in the Workplace, University of South Florida, 2021 | 23 Years                   |
| EDUCATION                                                                                                                                                                     | PROFESSIONAL AFFILIATIONS                                                                                     | *Experience outside of HDR |
| Juris Doctor, University of Virginia, 2002<br>M.S., Urban & Environmental Planning, University of Virginia, 2002<br>B.A., Environmental Science, University of Virginia, 1997 | American Planning Association                                                                                 |                            |

Laura brings two decades of experience with transit planning projects throughout the Southeast and Midwest. She has worked with transit agencies, large and small, to deliver a wide range of projects from transit development plans (TDPs) to microtransit feasibility studies to long-range master plans. Her expertise in sustainable planning, demonstrated by her Bachelors in Environmental Science, will support SunTran in creating a more environmentally conscious and efficient approach. Laura's leadership will provide guidance to help the SunTran COA project stay on schedule, within budget, and meet the needs of the community, ultimately enhancing the quality of life for Ocala residents.

RELEVANT PROJECT EXPERIENCE

**North Carolina DOT, Cabarrus County Microtransit Feasibility Study, Cabarrus County, NC\***  
**Project Manager.** The Microtransit Feasibility Study provided recommendations to streamline fixed-route transit service and overlay it with microtransit services to improve overall transit travel times in Cabarrus county. Both daytime and nighttime scenarios for microtransit service were developed.

**StarMetro, Transit Development Plan, Tallahassee, FL\***  
**Project Manager.** Laura led the successful development of the StarMetro TDP through the COVID pandemic. Without a change in schedule, she worked with agency staff to develop a robust, yet virtual engagement program that focused on accessible, organized, professional and fun engagement activities.

**North Carolina DOT, Greater Rocky Mount Greenville & Wilson Area Regional Transit Plan, Multiple Counties, NC\***  
**Project Manager.** The Regional Transit Plan was the first planning effort to use North Carolina's newly established planning process tool, developed as a statewide approach to coordinated regional public transportation planning. Based on significant public engagement and data analysis, the plan assessed and prioritized public transportation needs in a consistent and coordinated manner for the diverse population included in a 10-county area.

**Hillsborough County MPO, Brightline Station Area Study, Hillsborough County, FL**  
**Project Principal.** In advance of a new Brightline station proposed in greater Downtown Tampa (site TBD), HDR conducted a study for the Hillsborough TPO to establish a framework for addressing multimodal connections and enhanced accessibility to the station area. More specifically, the study: identified and analyzed potential users of the passenger rail service; determined demand for multimodal connections between the station area and major regional destinations; determined need for mobility facilities and infrastructure improvements that should be included as part of a station area development; and defined an early action plan outlining next steps in station area mobility planning once a station location is announced.

**Fort Bend Transit, Fort Bend County Short and Long-Range Transit Plan, Fort Bend County, TX\***  
**Project Manager.** Situated outside of Houston, Fort Bend Transit wanted a five-year implementation plan combined with a 20-year vision plan to guide its transit agency's development. Final recommendations included a three-phased plan for restructuring service in the post-pandemic environment, increasing service within the county, and finally expanding the geography of service beyond the county.

**Broward County, Transit Development Plan 2024-2033, Broward County, FL\***  
**Project Manager.** Despite a very tight schedule, Laura delivered a fully compliant 10-year TDP for Broward County that was adopted in December 2023. The plan included a robust engagement plan with an on-board passenger survey.

**Mississippi DOT Headquarters, Transit Plan and Intercity Bus Study Updates P&E, Statewide, MS**  
**Project Principal.** Principal in Charge. The Plan will be developed in concert with stakeholders, both private and public, throughout the State of Mississippi. It looks toward of future where technology innovation grows at an ever-accelerating pace, requiring a responsive and flexible public transit system. This plan will examine future scenarios which can be influenced by varying policies and recommendations and will present a conscious focus on those potential actions which support the attainment of the best future Mississippi we can envision.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



**Brad Thoburn**  
QUALITY CONTROL

**FIRM NAME**  
HDR

**EDUCATION**  
B.A., Politics, Washington and Lee University, 1992

**INDUSTRY TENURE**  
30+ Years

\*Experience outside of HDR

Brad has a record of accomplishments, leadership and innovation as a transportation executive with more than three decades of experience in multimodal transportation planning capital programs, policy development and government relations. His multimodal experience includes transit, rail, seaports, aviation and space program development. He is able to navigate community issues, political environments and government institutions to develop consensus on multi-faceted projects and issues. Brad also has expertise in transportation programs and policies and is a leader in efforts to integrate new technology, innovations and mobility solutions in transportation planning.

**Polk County, SunRail Commuter Rail Expansion, Polk County, FL**

**Project Policy Advisor.** As a subconsultant, HDR and Brad worked closely with team members developing a Transit Concept Alternatives Review (TCAR) Study for the proposed extension of SunRail into Polk County. The team is examining project alternatives, benefits, costs, funding options, economic development, mobility, transportation equity, and environmental considerations. The primary study objective is to select a recommended alternative and to prepare that alternative for entry into Project development under the Federal Transit Administration Capital Investment Grants Program.

**RELEVANT PROJECT EXPERIENCE**

**FDOT Central Office, State Transit Strategy, Tallahassee, FL**

**Policy Advisor.** Brad provided policy advisory services and technical reviews in the development of Florida's first Statewide Transit Strategy. Working with partner agencies throughout the state, the strategy was developed to rethink the role of FDOT in supporting transit, especially in the disruption of COVID, evolving transportation network companies, and emerging technologies and mobility options. State Transit Strategy provided the framework for important policy changes in funding program to support premium and high-capacity transit.

**FDOT, Assistant Secretary for Strategy Development/Interim Executive Director, Florida Rail Enterprise (FRE), Statewide, FL\***

Brad led the statewide transportation planning, modal development, research and innovation for FDOT. He was responsible for shaping the statewide transportation policy framework through the Florida Transportation Plan and guiding some of the state's most impactful transportation investments through the State's Intermodal System. He strengthened a vision for an integrated multimodal transportation system by planning for and investing in transit, rail, seaports, aviation, and space. He developed the Department's first statewide Transit Strategy and led efforts in the development of a supply chain resiliency plan. He also represented the Department on key committees and working groups including the AASHTO Transportation Policy Forum, Southeast Corridor Commission and The Eastern Transportation Coalition.

**FDOT, Brightline Tampa-Orlando, Sunshine Corridor Advisory Services, Multiple Counties, FL**

**Strategic Policy Advisor.** Brad provided policy and program guidance to the Department in discussions between Brightline and community stakeholders related to the potential lease of I-4 to enable future Brightline intercity rail connection between Orlando and Tampa. He supported the department in planning for the joint intercity and commuter rail "Sunshine Corridor" which would include federal intercity rail (FRA) funding and Commuter Rail (FTA) funding.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



**Joshua DeVries, AICP**

REVIEW OF EXISTING PLANS & CONDITIONS

**FIRM NAME**  
HDR

**EDUCATION**  
M.S., Urban and Regional Planning, University of Central Florida, 2016  
B.S., Planning, Northern Michigan University, 2005

**INDUSTRY TENURE**  
21 Years

Joshua is a transportation and urban planning professional with nearly two decades of planning, zoning, and transportation implementation experience, including over 15 years of experience in managing large-scale infrastructure projects, public-private partnerships, and transportation studies. Proven ability to lead multi-disciplinary teams, secure funding, and oversee transportation programs worth hundreds of millions of dollars. Dedicated to fostering community-focused mobility solutions through collaboration, strategic planning, and a commitment to sustainability.

RELEVANT PROJECT EXPERIENCE

**Emerald Coast Regional Council (ECRC), Okaloosa-Walton TPO 2050 Long Range Transportation Plan, Okaloosa and Walton Counties, FL**

**Project Manager.** Joshua coordinates directly with the ECRC/OW in-house staff to complete review of updated local, regional, state, and federal transportation planning policy and regulatory changes to be integrated into updates to the Goals & Objectives, Evaluation & Prioritization Criteria, Financial Resources, Needs List, and ultimately to develop a Cost Feasible Plan for adoption into the 2050 L RTP. As part of this effort, the Congestion Management Plan (CMP) is also being updated. While evaluating the needs for Okaloosa Walton L RTP, the Bicycle/Pedestrian inventory is also being carefully evaluated to verify existing conditions, areas with higher concentrations of pedestrian and bicyclists, as well as evaluating the level of traffic stress in those concentrated areas

to determine potential higher priority areas to focus future improvements.

**MetroPlan Orlando, 2050 Capacity and Project Bundles, Orange, Osceola, and Seminole counties, FL**

**Project Planner.** As part of MetroPlan Orlando's 2050 Metropolitan Transportation Plan (2050 MTP), the project team assisted with identifying the transportation network needs throughout the region. This included developing traffic projections for 2050, reviewing existing planning documents, meeting with local partners to better define their local needs, and bundling the identified needs based on their projected costs.

**Lake-Sumter MPO, LRTP Program & Plan Development, Lake and Sumter Counties, FL**

**Project Planner.** Under our General Planning Consultant contract, HDR is working with the Lake-Sumter MPO to update their 2050 LRTP. The 2050 Plan will examine the current transportation system, establish goals and objectives, and gather public input. A thorough technical analysis, including performance measures, will be used to evaluate needs and look at various future trends that might affect the system. Through coordination with local government and transportation agency partners, the 2050 Plan will produce a cost-feasible plan, a list of projects that the region can afford to build.

**Orange County, FTA Grant, Orange County, FL**

**Project Planner.** HDR is providing services associated with the development and submittal of the FTA Region IV New

Recipient Official Request Letter for the County. HDR provided trainings to staff on the FTA process, coordination between the client and FTA representatives, review of agency's documents and processes to support FTA capacity requirements (in the areas of legal, financial, civil rights, procurement, and technical), and management of submittal as required for submittal to FTA. HDR is working with national transit advisors along with local staff to support the client's effort in becoming an FTA grant recipient.

**Orange County, ADA Transition Plan Update, Orange County, FL**

**Project Planner.** HDR is providing support with updating Orange County's Americans with Disabilities Act (ADA) Transition Plan. HDR is reviewing and updating the prioritization methodology of projects to develop the schedule and budget needed for implementing the mitigation of ADA barriers across the County. HDR is also facilitating several stakeholder and public meetings to collect feedback on projects prior to finalizing the plan for County Commissioner approval.

**FDOT District 5, US 441 Safety, Central FL**

**Task Manager.** This study is identifying before and after crash statistics, speed measurements, and traffic volumes to determine what impact the improvements have had on the safety and efficacy of the traveling public using all modes.



Levi Hannon, GISP

MARKET & NEEDS / STANDARDS & POLICY - GIS

FIRM NAME  
HDR

EDUCATION  
M.A., Business Administration, Florida State University, 2019  
B.S., Environmental Science, Florida State University, 2011

INDUSTRY TENURE  
15 Years

Levi has a background in environmental science and business and over 15 years of GIS experience. He is passionate about cartography and is always looking for ways to advance client deliverables to cleaner, more informative products. In his daily tasks, he uses the following software: ESRI ArcGIS desktop and Pro applications, ESRI ArcGIS Online applications and development software, and Adobe Creative Cloud applications.

RELEVANT PROJECT EXPERIENCE

**Emerald Coast Regional Council (ECRC), Okaloosa-Walton TPO 2050 Long Range Transportation Plan, Okaloosa and Walton Counties, FL**

**GIS Specialist.** HDR is working with the ECRC/OW in-house staff to complete review of updated local, regional, state, and federal transportation planning policy and regulatory changes to be integrated into updates to the Goals & Objectives, Evaluation & Prioritization Criteria, Financial Resources, Needs List, and ultimately to develop a Cost Feasible Plan for adoption into the 2050 LRTP. As part of this effort, the Congestion Management Plan (CMP) is also being updated. While evaluating the needs for Okaloosa Walton LRTP, the Bicycle/Pedestrian inventory is also being carefully evaluated to verify existing conditions, areas with higher concentrations of pedestrian and bicyclists, as well as evaluating the level of traffic stress in those concentrated areas to determine potential higher priority areas to focus future improvements.

**Hillsborough County MPO, Brightline Station Area Study, Hillsborough County, FL**

**GIS Specialist.** In advance of a new Brightline station proposed in greater Downtown Tampa (site TBD), HDR is conducting a study for the Hillsborough TPO to establish a framework for addressing multimodal connections and enhanced accessibility to the station area. More specifically, the study is being undertaken to: identify and analyze potential users of the passenger rail service; determine demand for multimodal connections between the station area and major regional destinations; determine need for mobility facilities and infrastructure improvements that should be included as part of a station area development; and define an early action plan outlining next steps in station area mobility planning once a station location is announced.

**Hillsborough Area Regional Transit, TOD Pilot Grant Program, Hillsborough County, FL**

**GIS Specialist.** HDR is leading a multidisciplinary team of planners to prepare plan and code recommendations for equitable transit-oriented development along a ten mile corridor between Downtown Tampa and the University of South Florida. The project was sparked by local interest in promoting more transit supportive forms of development along corridors planned for enhanced service services which include modernization and extension of the Tampa streetcar system and initiation of a new BRT service.

**MS DOT Headquarters, Transit Plan and Intercity Bus Study Updates- TWO P&E | Mississippi, United States GIS Specialist.** HDR was selected for a task work order to update the statewide Transit Plan and Intercity Bus Study. The Plan will be developed in concert with stakeholders, both private and public, throughout the State of Mississippi. It looks toward of future where technology innovation grows at an ever-accelerating pace, and where immense changes to individual travel behavior, requires a responsive and flexible public transit system. This plan will examine future scenarios which can be influenced by varying policies and recommendations and will present a conscious focus on those potential actions which support the attainment of the best future Mississippi we can envision.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

|                                                                                                       |                                                                     |                                                  |                        |
|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|--------------------------------------------------|------------------------|
| <div>Savannah Hardisky, CFM</div> <div>MARKET &amp; NEEDS / STANDARDS &amp; POLICY - PRODUCTION</div> |                                                                     |                                                  |                        |
|                    | <b>FIRM NAME</b>                                                    | <b>CERTIFICATIONS</b>                            | <b>INDUSTRY TENURE</b> |
|                                                                                                       | HDR                                                                 | Certified Floodplain Manager, NC, No. NC-19-0769 | 7 Years                |
|                                                                                                       | <b>EDUCATION</b>                                                    |                                                  |                        |
|                                                                                                       | B.S., Environmental Science and Geography, Stetson University, 2018 |                                                  |                        |

Savannah is a transportation planner with GIS/planning experience in the floodplain management industry, water business, and transportation business sectors both private and public. She has a range of experience, including providing GIS services; developing public forward applications in ArcGIS Online; data management; conducting peer agency research; preparing grant applications; and writing technical reports.

RELEVANT PROJECT EXPERIENCE

**FDOT Central Office, Southbank Rail-Highway Crossing Study, Jacksonville, FL**  
**Transportation Planner.** The Southbank Rail-Highway Study conducts research and analyses to determine operational constraints, develop solutions and provide recommendations for improvements at six Florida East Coast Railway rail-highway crossings located in the Southbank and San Marco neighborhoods of Jacksonville, Florida. All six crossings are at-grade, resulting in train-vehicle/pedestrian/bicyclist conflicts. The average train length blocks all six crossings simultaneously. For moving trains, crossings are blocked for approximately five minutes. When a train is forced to stop south of the St. Johns River (approximately one time per day), it may block all six crossings for up to three hours. The blocked crossings impact movement within the local neighborhood, between the Southside and Downtown Jacksonville, and to the Baptist Medical Center. Recommendations of this study seek to minimize train-vehicle/pedestrian/bicyclist conflicts.

Performed TSM&O analysis including development of a TSM&O alternative using TSM&O strategies such as enhanced ATMS, cutting-edge Connected Vehicle strategies to minimize conflicts, improve regional mobility, and enhance safety.

**Capital Metro Transportation Authority, Program Manager Owner's Representative, Austin, TX**  
**Transportation Planner.** The residents of Austin have approved a comprehensive, sweeping transit plan that will provide new travel options throughout the city as well as manage congestion, increase mobility outcomes and improve environmental outcomes. HDR started early to help Capital Metro frame the program and the strategy - we served as program manager/owner's representative through the program development and funding process and will continue to do so through the life of the program, which is expected to stretch into the next decade. Project Connect will provide two light rail lines, operating free from traffic, that will link key destinations throughout Austin and provide commuters and visitors with a mode of travel that currently doesn't exist within the city. It also includes bus rapid transit, park and bus rides, a new fleet maintenance/admin facility, a new downtown transit tunnel, as well as some other customer-focused technology improvements. The expanded transit system will help manage congestion and environmental impacts of increased traffic by providing more choices to more people, allowing them to connect with more places.

**Mississippi DOT, Transit Plan and Intercity Bus Study, Statewide, MS**  
**Transportation Planner.** HDR was selected for a task work order to update the statewide Transit Plan and Intercity Bus Study. The Plan will be developed in concert with stakeholders, both private and public, throughout the State of Mississippi. It looks toward of future where technology innovation grows at an ever-accelerating pace, and where immense changes to individual travel behavior, requires a responsive and flexible public transit system. This plan will examine future scenarios which can be influenced by varying policies and recommendations and will present a conscious focus on those potential actions which support the attainment of the best future Mississippi we can envision.

**North Carolina DOT, Transit Zero Emissions Vehicle Plan, Wilmington, NC**  
**Transportation Planner.** The study, supported by and coordinated with, the North Carolina Department of Transportation will facilitate 1) the creation of a Zero-Emission Fleet Transition Plan, and 2) the engineering and design for infrastructure for charging stations. The Transition Plan is a requirement by FTA to apply for grant funds supporting any ZEV projects, including vehicles and all related infrastructure. Transportation accounts for 29 percent of U.S. greenhouse gas emissions. Planning for the electrification of the fleet will help position CPTA to purchase or lease electric vehicles that help reduce pollutants and combat negative climate change.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

Dave Totten, CFM

OPERATIONS, PLANNING & ANALYTICS - SERVICE PLANNING LEAD



**FIRM NAME**  
HDR

**EDUCATION**  
M.A., Urban and Regional Affairs, University of Pittsburgh, 2007  
B.A., Communications and Journalism, Univ. of Alaska, Anchorage, 1997

**CERTIFICATIONS**  
AICP - American Institute of Certified Planners, No. 30518

**INDUSTRY TENURE**  
34 Years

David is a respected planning leader with 19 years of experience in land-use and transit planning, including state and federal funding for capital projects, transit-oriented development (TOD), and rural transit strategies. Over his two years with HDR and his 17-year career at Metropolitan Planning Organizations (MPOs), he led more than 20 planning projects—delivered on-time, on-budget—including support for successful applications to federal programs, such as Small Starts and MEGA, and state support for innovative rural services and plans. His areas of expertise include transit strategic planning & transit agency consolidations; transit development planning (TDP); long-range and capital planning; demand-response/5310/community transit; microtransit; rural transit; multimodal corridor planning; and affordable housing/equitable TOD.

RELEVANT PROJECT EXPERIENCE

**Municipality of Anchorage, Coordinated Human Services Transportation Plan Update, Anchorage, AK**  
**Project Manager.** Ahead of tight regulatory deadlines, David led the update to Anchorage's CHSTP with a stakeholder-driven approach designed to produce an action-oriented plan for a community experiencing rapid growth in senior and veteran population even as overall population declines. David employed AI-powered land-use analysis along with rider and agency surveys across the private, non-profit, and government sectors to bring consensus for a plan that will live on long after adoption.

**Pittsburgh Regional Transit, Facilities Master Plan, Pittsburgh, PA**

**Transit Planner.** As part of "Project Zero," David led the development of a park-and-ride strategic plan and contributed his capital planning expertise to strategies for Pittsburgh's next generation of operating and maintenance facilities. David also contributed to real estate acquisition planning and facility designs.

**Pittsburgh Regional Transit, Light Rail Accessibility Program, St. Anne & Bethel Village Stations, Pittsburgh, PA**

**Transit Planner.** Through PRT's All-Stations Accessibility Program funding award, David led safety research and planning at two light rail transit stations in suburban Pittsburgh, analyzing incident data, community aspirations, and Safe Routes to Transit best practices to recommend traffic network improvements for walkability and bike safety. David contributed essential public engagement expertise leading to a community context approach in bringing the stations to ADA compliance.

**MTA Regional Partnership Study, Flint, MI**

**Transit Planner.** Facing a potentially existential funding shortfall, Saginaw, Michigan's transit provider, STARS, reached out to neighboring Flint MTA for guidance about a possible merger. David provided key analysis and research, preparing the Service Area Profiles report and leading

research into agency consolidation options. David's strategic planning expertise and transit agency experience helped Saginaw weather the short-term crisis and plan for future regionalization.

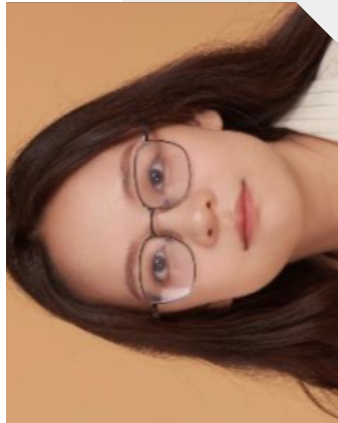
**MOTA Transportation Service, Merger, and Facility Feasibility Study, Big Rapids, MI**

**Transit Planner.** As Michigan's bi-county Mecosta Osceola Transit Authority considers its needs for a new operating facility, David led the study into the potential for a merger with DART, the transit agency for region's central city, Big Rapids. The analysis included an extensive Service Area Profiles report with a Transit Propensity Index map showing areas with unserved potential riders, as well as a strategic plan outlining steps MOTA and DART could take toward cooperation.

**Southwestern Pennsylvania Commission, SmartMoves Connections, Pittsburgh, PA**

**Senior Transit Planner.** This regional transit vision for Pittsburgh, PA, included transit supportive land use analysis of 10 counties, transit case studies, and VISSIM simulations of potential multimodal hubs. Winner of APA PA 2022 Award for Plans.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



Ke Zhou

OPERATIONS, PLANNING, & ANALYTICS - DATA ANALYTICS LEAD

FIRM NAME  
HDR

EDUCATION  
M.S., City Planning, Transportation Planning, University of Pennsylvania, 2024  
B.S., Geography and Urban-Rural Planning, Hainan University, China, 2020

INDUSTRY TENURE  
1 Year

Ke Zhou is a dedicated transportation planner graduated from the University of Pennsylvania, who is adept at geospatial data analysis and visualization using Python, GIS and R, and is familiar with spatial optimization. She has worked as a transportation research assistant at Penn. She is also experienced in design software including Sketchup and Adobe Suite, and is confident to contribute to graphics, mapping and design. Her main interests in transportation are transit, multimodal, freight and urban system.

RELEVANT PROJECT EXPERIENCE

**FDOT, Rural Area of Opportunity Connectivity Analysis, FL Planner.** HDR was tasked to conduct an analysis of the connectivity of rural areas to urban areas and the regional employment centers in Florida. Ke and team conducted geospatial studies, produced maps and analyzed characteristics of the existing transportation system in Florida, and is working to identify projects to address the connectivity gap.

**VIA TBEST Modeling and Ridership Forecasting, San Antonio, TX Planner.** To evaluate the impact of VIA's BBP (Better Bus Plan) Network Redesign on ridership as well as creating a tool that VIA can use on an ongoing basis to support service planning and analysis, HDR was tasked to set up a TBEST ridership model. Ke led in data analysis and data transformations on

GTFS, APC, socioeconomic and land use datasets to set up and calibrate TBEST models for VIA's existing transit system and its Better Bus Plan network redesign system. Ke updated service and route pattern changes of the redesign network in coordination with Foursquare ITP, conducted ridership forecasts for different system scenarios, presented model results at technical meetings with VIA, and produced the final report.

**VIA, Mobility Hub Study, San Antonio, TX Planner.** HDR was tasked by VIA to develop guidelines through a set of documents to plan and implement mobility hubs across the city. Ke conducted geospatial analysis and visualization on ridership and demographics and worked with team to develop criteria for mobility hub site selection. Ke and team built a workflow of scoring and selecting potential hub locations using ArcPy (Python and GIS), incorporating available datasets on natural and built environment, land uses, socioeconomic, transit propensity, existing/future transit, development potential and so on.

**Trinity Metro, Strategic Action Plan, Fort Worth, TX Planner.** HDR was tasked to develop a Strategic Action Plan to drive the agency's growth. Ke produced a comprehensive agency overview, analyzing TM's metrics in ridership, on-time performance, service reliability, customer/employee satisfaction, safety, accessibility, financial performance, environmental impact, and service area existing conditions. Ke also collected and analyzed related data of peer agencies to

provide benchmarks, conducted a SWOT analysis, produced a tech memo to record the engagement process, and worked with team to develop the final Strategic Action Plan.

**City of Georgetown, CAMPO Applications, Georgetown, TX Planner.** Ke gathered and analyzed a wide range of data related to socioeconomic, spatial layout, and infrastructure initiatives. Ke produced a series of detailed maps and thorough text document about existing conditions and project details, supporting the City of Georgetown in its application for CAMPO's Transportation Improvement Program grants.

**VIA, Bus Network Redesign, San Antonio, TX Planner.** Ke conducted geospatial data analysis and visualization using Replica, R and GIS on system ridership, community profiles and travel pattern changes. Ke worked with Foursquare ITP to conduct market assessment and contributed to report writing and presentations.

**Orange County Transportation Authority (OCTA), Fixed Guideway, Orange County, CA Planner.** Ke carried out financial analysis on the operation cost of the Orange County streetcar system, pulled data from the National Transit Database and agency reports to provide benchmarks and peer references, and provided comparative analysis across the agency's operating expenses to identify gaps.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



**Amber Lindsey**  
SCHEDULE/RUN CUTTING

**FIRM NAME**  
HDR

**EDUCATION**  
B.S., Public Administration, University of Central Florida, 2022

**INDUSTRY TENURE**  
4 Years

Amber is a Transportation Planner who works on various projects, involving local roads, highways, and transit. Amber actively supports long-range planning for Metropolitan Planning Organizations. In addition, she assists with PD&E and Feasibility Studies for corridors and trails. Amber also aids in Transit Development Plans, Mobility Plans, and Comprehensive Operations Analyses for transit agencies. She is proficient in Microsoft Office, Remix, Replica, InDesign, and SketchUp.

RELEVANT PROJECT EXPERIENCE

**EC Rider, Comprehensive Operations Analysis**  
**Transit Planner.** HDR completed a Comprehensive Operations Analysis for the EC Rider system. The analysis included thorough review of the transit network, and evaluated route performance, system operations, ridership experience, and scheduling efficiency. HDR developed a range of scenario planning options to strengthen system connectivity and performance. Additionally, HDR defined areas that had potential for hosting Mobility on Demand (MoD) zones in the future.

**West Florida Regional Planning Council, ECAT Comprehensive Operations Analysis, Escambia County, FL**  
**Transit Planner.** HDR developed a Comprehensive Operations Analysis for Escambia County Area Transit (ECAT). Building off an earlier Transit Development Plan (TDP) and Bus Stop Assessment, HDR performed a thorough

analysis of every route to develop detailed profiles and understand travel behavior. This information allowed for redesign recommendations for a system with more focus on major corridors with MoD zones in less dense parts of the community to provide critical first mile/last mile connections.

**Bayway Transit, Strategic Micromobility Plan, Bay County, FL**

**Transit Planner.** HDR was tasked with the assessment of Mobility on Demand (MoD) for Bayway's transit system. The plan included an assessment of the costs, vehicle needs, and ridership estimates for a systemwide MoD program. Overall, HDR outlined four system scenarios for connecting the three transfer centers via fixed route service and using MoD to provide service from the transfer centers to residences, employment centers, and other destinations.

**Space Coast TPO, Transit Development Plan and Long-Range Transportation Plan, Brevard County, FL**

**Transit Planner.** HDR worked with the Space Coast Transportation Planning Organization (SCTPO) to update their 2050 Long Range Transportation Plan (LRTP). The 2050 LRTP update includes an alignment with the Space Coast Area Transit 10-year Transit Development Plan (TDP) to align planning and funding horizons. The TDP included an analysis of baseline conditions, system performance, public awareness, and ridership forecasts. Ultimately, HDR defined a ten-year plan for Space Coast Area Transit that consisted of a service improvements plan, financial plan, and implementation plan.

**International Drive Business Improvement District, Transit Planning Services, Orange County, FL**

**Transit Planner.** HDR led three assignments for the International Drive Business Improvement District. The first involved researching and recommending a transit app that would offer passengers real-time transit information as well as convenient payment options in one location. The second is centered on the feasibility of implementing dynamic pricing on the trolley service. Finally, a new trolley schedule was created to reduce the number of vehicles in operation during off-peak times.

**Space Coast TPO, Cocoa Intermodal Rail Station Feasibility Study, Brevard County, FL**

**Public Involvement Lead.** Under our continuing transportation planning contract with the Space Coast TPO, HDR evaluated the potential for a passenger rail station in Cocoa, FL for Brightline Trains, which had been previously proposed and analyzed in a 2016 Passenger Rail Study. The study answered key questions, identified constraints, opportunities, and Transit Oriented Development potential. The study provided a summary of the station area's land use and transportation context, the potential travel market as well as environmental constraints and considerations. Also included in the study was an analysis of the station area site and recommendations for potential intermodal connections, conceptual design considerations and needed infrastructure improvements. Additionally, the plan outlined grant opportunities and implementation strategies. HDR also provided content development, graphic design, and stakeholder engagement.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



Stephen Alianiello

PUBLIC INVOLVEMENT

FIRM NAME  
HDR

EDUCATION  
M.B.A., University of Central Florida, 2006  
B.S., Management, University of Central Florida, 2004

CERTIFICATIONS

Social Marketing in Transportation Certificate,  
University of South Florida, 2014

INDUSTRY TENURE  
15 Years

With over a decade of transportation public outreach experience, Stephen provides effective outreach engagement strategies as well as multi-modal solutions. He has developed trusted relationships with MPOs/TPOs, FDOT, local governments, transit and planning agencies, along with prominent businesses throughout Central Florida. Stephen is passionate about providing the projects he serves with measurable results that improve quality of life. Stephen has provided outreach services for projects including the launch of SunRail, multiple service expansions to LYMMO, introducing car-share and bikeshare to residents, employees, and visitors alike to Central Florida.

RELEVANT PROJECT EXPERIENCE

**FDOT Central Office, Target Zero Campaign, Statewide, FL Task Lead.** Stephen is serving as a Target ZERO Task Lead assisting the department in achieving the state's bold target of ZERO fatalities and serious injuries. HDR's Strategic Communications team efforts includes communication and PIO support, partner strategy, social media, branding and design, video, website, cross cultural campaign strategy and evaluation. Stephen is responsible for overseeing the day-to-day program evaluation of the Target Zero initiative as well as the development of the initiative's website.

**Space Coast TPO, Long Range Transportation Plan (LRTP) and Transit Development Plan (TDP), Brevard County, FL Public Involvement Lead.** HDR is working with the Space Coast TPO to update their 2050 LRTP. The 2050 LRTP update includes an alignment with the Space Coast Area Transit 10-year Transit Development Plan to align planning and funding horizons. A performance-based planning approach to plan development and a multi-faceted public engagement campaign is underway, with the adoption of Advancing Long Range Plans set for July 2025. Stephen is leading HDR's public engagement support to the Space Coast TPO for two Long Range Plan updates, both currently underway. Services include the development of plan branding, community analytics, creation of print and digital assets, and innovative engagement activities at in-person workshops and on the project webpage.

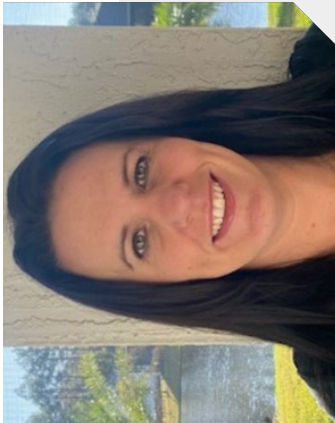
**Broward MPO, Community Engagement, Broward County, FL Deputy Project Manager.** HDR worked closely with the Complete Streets initiative technical consultant, and which included regularity scheduled program management meetings and/or teleconferences and preparing detailed (by task) monthly progress reports.

**Osceola County, Sunbridge Parkway Extension, Osceola County, FL Public Involvement Lead.** Stephen oversees project branding, development of print and digital communications tools and implementation of public meetings and events.

**FDOT District 1, I-75 at Moccasin Wallow Road Interchange PD&E Study, Manatee County, FL Public Involvement Task Lead.** The existing I-75 at I-275 and Moccasin Wallow interchanges are located at Mile Post 229 and 230, respectively, in Manatee County. Auxiliary lanes will be provided between the interchanges. A braided ramp alternative is being considered between the I-275 and Moccasin Wallow interchanges. The interchange improvements are part of the master plan for I-75 which evaluated long term alternatives for both the mainline and interchanges in Sarasota and Manatee counties. Stephen is responsible for leading community engagement activities throughout the PD&E study, including creating and implementing the Public Involvement Plan, executing a public meeting and public hearing, and managing public comments and responses.

**Orange County, Americans with Disabilities Act (ADA) Transition Plan Update, Orange County, FL Public Involvement Lead.** HDR reviewed and updated the prioritization methodology of projects to develop the schedule and budget needed for implementing the mitigation of ADA barriers across the County. HDR also facilitated several stakeholder and public meetings to collect feedback on projects prior to finalizing the plan for County Commissioner approval. Stephen managed public involvement activities including stakeholder and public meetings, development of a plan brochure and newsletter, and comment management.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



Julie Gilliland

TITLE VI & EQUITY ANALYST

FIRM NAME  
HDR

EDUCATION  
B.A. & S., Humanities, Florida State University, 2005

INDUSTRY TENURE  
21 Years

Julie's background includes work at the Center for Urban Transportation Research at the University of South Florida and at the Institute for Applied Business Research at Florida State University. She is a subject matter expert in FDOT public transit maintenance compliance and knowledgeable in other key areas of FDOT public transit compliance, such as operations and safety.

RELEVANT PROJECT EXPERIENCE

**FDOT District 2, Mobility Week Coordinator, Districtwide, FL**

**Senior Transportation Planner.** Julie is assisting with various planning studies through research, analysis, and report development.

**FDOT Central Office, State Transit Strategy Plan, Statewide, FL**

**Lead Developer.** As lead developer of visual document for the Statewide Transit Strategy Plan for Central Office, Julie is assisting with the plan development and specific program SOPs.

**FDOT District 6, Vehicle Maintenance Reviewer, Districtwide, FL**

**Senior Transportation Planner.** Conducts desk reviews of transit agencies receiving only 5310 grant funds as part of their Triennial Review, as a subconsultant to another firm. Desk reviews include evaluation and analysis of written policies,

vehicle maintenance activities and overall maintenance program oversight. Julie assists with identifying and assigning deficiencies, areas of concern, and recommendations for transit agencies based on a comprehensive knowledge of FDOT maintenance requirements. She develops supporting documentation and enters findings into TransCIP program on behalf of RPG/FDOT.

**FDOT Central Office, Southbank Rail-Highway Crossing Study, Jacksonville, FL**

**Senior Transportation Planner.** The Southbank Rail-Highway Study conducts research and analyses to determine operational constraints, develop solutions and provide recommendations for improvements at six Florida East Coast (FEC) Railway rail-highway crossings located in the Southbank and San Marco neighborhoods of Jacksonville, Florida. All six crossings are at-grade, resulting in train-vehicle/pedestrian/ bicyclist conflicts. Recommendations of this study seek to minimize train-vehicle/pedestrian/bicyclist conflicts. Performed TSM&O analysis including the development of a TSM&O alternative using TSM&O strategies such as enhanced ATMS, cutting-edge Connected Vehicle (CV) strategies to minimize conflicts, improve regional mobility, and enhance safety.

**International Dr. Business Improvement District, I-Drive District Transportation Strategic Plan, Orlando, FL**

**Senior Transportation Planner.** Due to the high number of destinations and demand in the district, the existing

transportation system does not consistently provide efficient and reliable access and mobility. The I-Drive District Master Plan lays out an integrated set of potential solutions to improve mobility to/from and within the district. HDR developed this plan using a multimodal lens and considered the existing land use pattern, as well as future land and development plans. A special focus on the plan was the potential recommendations for service and electrification of the I-Ride Trolley Services to better serve the district's explosive growth in a more sustainable way.

**MS DOT Headquarters, Transit Plan and Intercity Bus Study Updates - TWO P&E**

**Senior Transportation Planner.** HDR was selected for a task work order to update the statewide Transit Plan and Intercity Bus Study. The Plan will be developed in concert with stakeholders, both private and public, throughout the State of Mississippi. It looks toward of future where technology innovation grows at an ever-accelerating pace, and where immense changes to individual travel behavior, requires a responsive and flexible public transit system. This plan will examine future scenarios which can be influenced by varying policies and recommendations and will present a conscious focus on those potential actions which support the attainment of the best future Mississippi we can envision.



**Victor Condezo**  
FIELD DATA COLLECTION

**FIRM NAME**  
HDR

**EDUCATION**  
MA, Urban & Regional Planning, University of South FL, 2024  
BA, Psychology, University of South Florida, 2018

**INDUSTRY TENURE**  
6 Years

Victor is an urban and regional planning professional with over two years of experience, specializing in Geographic Information Systems (GIS). He has a strong background in spatial analysis and is proficient in applying LIDAR technology to support planning initiatives. Victor contributes to report writing, data analysis using spreadsheets, and field documentation. His fieldwork includes photographing highway exits, bike lanes, and commercial corridors—most recently capturing imagery of large gas stations to assess adjacent land use patterns.

**RELEVANT PROJECT EXPERIENCE**

**Pinellas Suncoast Transit Authority (PSTA), Connecting South St. Pete CRA, St. Petersburg, FL**

**Planner.** South St. Petersburg communities enjoy a rich history, tremendous locational advantages, and unique social, economic, religious, and community assets not found elsewhere in the City and County. But these very same places continue to struggle due with underinvestment, limited mobility choices, and barriers to opportunity. South St. Petersburg communities face significant, persistent disadvantages, including those related to poverty, limited mobility choice, travel safety, health, and affordability. In partnership with the City of St. Petersburg and FDOT, PSTA has selected HDR to conduct a CRA study that will evaluate options to enhance the multimodal transportation system in South St. Petersburg.

**City of Tampa, Regional Mobility & Transit Planning Tampa, FL**

**Planner.** HDR is evaluating changes to the project definition associated with extending streetcar service using existing vehicle technology (the replica Gomaco vehicles) and potentially continuing the route further north to Columbus Avenue. The evaluation considers the following: revisions to guideway alignments; changes in stop configurations and locations to support replica vehicle operations; updating capital and operating costs; revising funding and financing strategies; and defining future tasks required to complete FTA Project Development and advance into early stages of design and engineering. Victor is providing assistance on a task to explore the potential for a new preferred alternative for the Tampa Streetcar Extension project.

**Pinellas County, Dunedin Causeway BIP – Bridge Project Application Notification, Pinellas County, FL**

**Planner.** In response to the Bridge Investment Program (BIP) Planning and Bridge Project Grants Notice of Funding Opportunity, HDR prepared the FY 2025 BIP Grant Application for Dunedin Causeway Main Bridge Replacement Project on behalf of Pinellas County. HDR completed four key tasks as part of this effort: 1) collected specific bridge data, including non-motorized counts, bridge span openings and vessel counts, emergency response calls and times, project costs with associated year of expenditure, and funding sources;

2) conducted a Benefit-Cost Analysis and documented results in a supporting technical memorandum; 3) prepared a technical memorandum that summarized the evaluation, prioritization, and recommendations of funding opportunities/potential funding source options for the project; and 4) prepared the eight-section, 25-page BIP grant application narrative with supporting appendices and associated application Excel form as part of the overall application package. HDR will assist Pinellas County with any needed follow up tasks, including participation in a debrief with Federal Highway Administration (FHWA), preparation of supplemental materials to support the application in response to FHWA comments, or full resubmission of the grant application for the FY 2026 BIP grant program in November 2025.



Tim Thornton

O&M FEASIBILITY & ORGANIZATIONAL DESIGN - TRANSIT FINANCE / COST MODELING SME

FIRM NAME  
HDR

EDUCATION  
M.B.A., Rice University, 2004  
B.A., Economics, Lafayette College, 1998

INDUSTRY TENURE  
27 Years

Tim has over two decades of experience as a trusted advisor to public sector clients on infrastructure and real estate finance, transportation economics, land use market and financial analysis, and public policy. His areas of expertise include real estate financial and market feasibility, transit-oriented development, land use value capture opportunities, joint development / public-private partnership advisory, and transaction due diligence. He also has in-depth experience with infrastructure funding and financing strategies, including qualitative and quantitative evaluation of federal, state, and local funding options, and state and federal discretionary grant application development.

RELEVANT PROJECT EXPERIENCE

**City of Altamonte Springs, CraneRIDES AV Shuttle Rate Study, Altamonte Springs, FL**  
**Financial Consultant.** HDR is performing transportation planning support services for the CraneRIDES AV Shuttle Rate Study, which will provide the city with a recommended monetary assessment rate on parcels benefiting from proximity to the CraneRIDES AV Shuttle. The analysis will result in an assessment rate or range of rates that will generate a stream of revenue sufficient to cover ongoing costs to operate and maintain the AV shuttle service.

**City of Huntsville, University-Medical BRT Transit-Oriented Development Study, Huntsville, AL**  
**Financial Consultant.** The University-Medical BRT corridor in Huntsville presents an opportunity to link three key development nodes along the corridor: the Northwoods public housing complex, the University of Alabama in Huntsville, and a mixed-use development called Mid City. HDR hosted educational events explaining Transit-Oriented Development to the community and captured their vision of how these three neighborhoods can density and accommodate additional growth. The HDR team then hosted a week-long design charrette to develop concept plans and complementary bicycle and pedestrian infrastructure to support multimodal mobility in each of the neighborhoods, including recommending more pedestrian-friendly cross sections for US 72. The project explores inclusive community strategies to enhance quality of life for existing residents through a new development that creates places where everyone can thrive.

**Valley Regional Transit, Nampa Caldwell TOD Corridor Study, Nampa, ID**  
**Financial Consultant.** HDR is performing a TOD Corridor Study between Nampa and Caldwell that will engage key stakeholders and the public in delivering a multi-modal vision for the corridor. As the Valley continues to grow, developing this corridor to better accommodate transit, rail, bikes, and pedestrians will help alleviate congestion, allow residents maximum mobility, and continue to foster livable communities.

**Metropolitan Transit Authority of Harris County (Houston METRO), General Planning Consultant, Houston, TX**  
**Financial Consultant.** HDR is a General Planning Consultant (GPC) and provides planning, program management, conceptual design, environmental planning, transportation planning, transit-oriented development, corridor planning, long range planning, high-capacity transit planning, GIS, travel demand modeling, transit service planning, agency coordination and strategic planning for the transit agency.

**MARTA, Financial Planning Service, Atlanta, GA**  
**Financial Consultant.** HDR developed a financial planning framework to estimate MARTA's future financial capacity to support capital programs and operations and maintenance (O&M) expenses over a 30-year planning horizon for baseline and alternate scenarios. The cash flow model accounts for current and projected revenue streams, capital plans and programs, operating service plans and cost estimates, ridership and fare revenue forecasts, and economic projections.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



Jason Kelly, CPM

O&M FEASIBILITY & ORGANIZATIONAL DESIGN - PERFORMANCE STANDARDS

FIRM NAME  
HDR

EDUCATION  
M.S., Public Administration, Arizona State University, 2022  
B.S., American Studies, Grinnell College, 2000

CERTIFICATIONS  
Certified Public Manager (CPM), Bob Ramsey  
Executive Education, Arizona State University

INDUSTRY TENURE  
17 Years

\*Experience outside of HDR

Jason is a senior planner with experience in a variety of multimodal projects in statewide, urban, rural and tribal contexts. His client portfolio ranges from developing, managing and implementing projects and programs for state departments of transportation, transportation authorities, regional and metropolitan planning agencies, local municipalities, and human service transportation agencies. Prior to consulting, he worked for government agencies at various levels to develop and implement transportation policy, planning services, program management, performance management, transit operations, grants administration. He is proficient with helping clients navigating complex decision environments to deliver projects benefiting multiple organizations and constituents.

RELEVANT PROJECT EXPERIENCE

**NJ TRANSIT, Trans-Hudson Intermodal Planning, NJ Deputy Project Manager.** HDR is partnering with New Jersey Transit in a five-year task order contract for a generational impact project across four key areas: Long Range Planning, Scenario Planning, Planning Studies, and Gateway Program Support. Jason is a member of the project leadership team and is responsible for all project controls, managing subconsultant contracts, and coordinating the delivery of work products with task leaders and the Project Manager.

**Oregon DOT, Public Transportation Program Oversight, Portland, OR\* Transit Coordinator.** Administered grants, policies, funding, technical assistance, and compliance oversight for 12 rural and urban grant recipients in Portland metropolitan area. Active in all state and federal grant funding solicitations and proposal selection processes, authored scopes of work, monitored provider reporting and compliance, and administered payment authorizations. Liaised with DOT business lines to incorporate transit-related initiatives into infrastructure projects while also serving as a technical advisor to recipients in the development of local transit development plans, master plans, and during NEPA activities. Supported the deployment of two new state funded grant program resulting in the largest expansion of transit services in state history.

**Mississippi DOT, Transit Plan and Intercity Bus Study Task Lead.** HDR supports the development of the statewide Transit Plan and Intercity Bus Study that examines future scenarios which can be influenced by varying policies and recommendations and will present a conscious focus on those potential actions that support the best future Mississippi. Jason leverages his experience in rural, urban and statewide transit markets to lead the gap and need analysis and development of the implementation plan.

**Oregon DOT, Bus on Shoulder Pilots, Portland, OR\* Project Manager.** Led project teams in the development and implementation of two bus on shoulder pilots as part of the

DOT's broader strategy to improve mobility and reduce congestion in the Portland metropolitan area. Managed project teams across the Oregon-Washington bi-state region to establish concepts of operations, deploy strategic engagement activities, and monitor BOS pilot performance in two key urban corridors. Liaised with the State Engineer's office to initiate an amendment to the Oregon Administrative Rules and State Engineering protocols for permanent BOS operations.

**FDOT District 2, Transit Grant Program On-Call Procurement Support, Districtwide, FL Procurement Lead.** Provides ongoing public transportation procurement technical assistance and oversight services for District staff and transit grant recipients. Reviews and monitors grant recipient procurement solicitations and contributes statutory and regulatory interpretations and guidance to help agencies comply with all requirements.

**Chino Valley Transit, Town of Chino Valley, Chino Valley, AZ\* Project/Program Manager.** Led the planning and implementation of the region's first public transit program using innovative community resources. His work included contracting with consultant services to develop a feasibility study, gathering public support, and partnering with neighboring MPO and state DOT transit leadership to secure FIA grant funding. Cooperated with local non-profits to establish a community volunteers to operate and sustain the program with limited cash outlay until the program transitioned to non-profit status. Jason was responsible for creation and stewardship of all related policies, procedures, training, and hiring activities.

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance

Elena Wilken

O&M FEASIBILITY & ORGANIZATIONAL DESIGN - MAINTENANCE & FLEET SME; HR/LABOR & ORG DESIGN SME



FIRM NAME  
HDR

INDUSTRY TENURE  
22 Years

EDUCATION  
M.S., Business Administration, University of Colorado, Denver  
B.S., Political Science, Penn State University Park

Elena brings experience developing financial strategies for infrastructure projects including analyzing long-range financial models and funding opportunities. Prior to joining HDR, she worked with transit agencies, metropolitan planning organizations and the Colorado Department of Transportation to identify key metrics, match programs and projects to grant opportunities, and prepare successful grant applications. On behalf rural transit systems, Elena successfully advocated for revisions to the federal transit formula funding allocation to better reflect transit performance measures. Additionally, she administered a highly successful transit funding coalition among Colorado transit systems that led to successful grant awards for a rural BRT project, multiple electric bus fleet transitions and construction of new maintenance and multi-modal facilities.

RELEVANT PROJECT EXPERIENCE

**Amtrak - Philadelphia, Amtrak New York Penn Station Asset Analysis & Capital Planning, Philadelphia, PA**  
**Financial Consultant/Technical Writer.** Planning, analytical and design development services to support continual improvements through Amtrak owned properties in Manhattan. Project includes advisory support to assist Amtrak in furthering improvements to Amtrak's Penn Complex, including customer and operational needs and a plan to

best utilized these real estate assets in New York City. Elena reviewed documentation, aligned current project status with recommended funding sources, and drafted funding recommendations.

**CDOT Region 1, Santa Fe Dr PEL, Early Action Projects, Littleton, CO**

**Grant Analyst.** HDR assisted CDOT and six agency partners along the Santa Fe corridor, to develop a vision and plan for future transportation improvements. This Planning and Environmental Linkage (PEL) Study resulted in the Santa Fe Drive Action Plan, which identified future transportation and safety improvements for an 11 mile stretch of Santa Fe Drive (US 85) between C-470 and I-25. Elena provided alignment with grant opportunities for the various projects along the corridor.

**City of Colorado Springs, CO, Federal Grant Support, Colorado Springs, CO**

**Project Manager and Grant Writer.** HDR is providing a wide range of services to the City of Colorado Springs in grant agreement and administration support, capital grant application development, benefit-cost analysis, data collection, federal grants strategy, support coordination with federal agencies, and other services as requested. Elena provided project management and content development for the

following grant applications; US 24/Peterson Space Force Base Defense Communities Infrastructure Pilot (2023 DCIP), Pine Creek 2023 DCIP application, 2023 Monument Creek Water SMART Grant, Fountain Creek Restoration 2024 WaterSMART Aquatic Ecosystems and Planning and Design applications.

**Colorado Office of State Planning and Budgeting (OSPB), HUD GRRP Application Support | Denver, CO**

**Project Manager.** HDR is providing outreach and assistance on behalf of the Office of Economic Recovery to Public Housing Authorities in identifying eligible projects and applying for funding from the Housing and Urban Development (HUD) Green and Resilient Retrofit Program (GRRP) grant program.

**Dallas Area Rapid Transit, DART GPC7 TO 30 Grant Support, Dallas, TX**

**Lead Grant Writer.** Provide research, development, and submittal support of grant applications for federal, state, or local grant programs.



Micah Gillion, AICP, TSSP

O&M FEASIBILITY & ORGANIZATIONAL DESIGN - SAFETY & COMPLIANCE SME

FIRM NAME

HDR

EDUCATION

B.A., Growth Management, Rollins College, 2009  
B.S., Sociology, Bowie State University, 1996

CERTIFICATIONS

American Institute of Certified Planners, No. 024871  
Transit Safety and Security Program (TSSP) Certified

INDUSTRY TENURE

29 Years

Micah is experienced in transit safety and security, land use, environmental, corridor, multi-modal and transit planning, and roadway design. In addition, his experience includes extensive knowledge in transit safety and security as well as oversight and Federal Transportation Administration (FTA) grants management. Micah has Transportation Safety and Security Program (TSSP) certifications in both Bus and Rail from the Transportation Safety Institute (TSI).

RELEVANT PROJECT EXPERIENCE

Austin Transit Partnership / Capital Metropolitan Transportation Authority (Cap Metro), Light-Rail Transit (LRT) and Bus Rapid Transit (BRT), Austin, TX

**Safety & Security.** HDR provided support on the development of safety and security documents for two new Bus Rapid Transit (BRT) projects and multiple Light Rail Transit (LRT) projects. Micah's duties included the development of a System Safety Management Plan (SSMP), Preliminary Hazards Analysis (PHA), and Threats and Vulnerability Analysis (TVA) for the projects. He also assisted with the safety and security certification of the projects during the preliminary planning and design phases of the project. Additional duties included reviewing and revising the Safety Design Criteria (DC) for the LRT projects.

Omaha Streetcar Authority, Omaha-Streetcar Final Design, Omaha, NE

**Safety & Security.** HDR is providing continuing support on the development of safety and security documents for a new Streetcar Transit project in Omaha, NE. His project duties include development of a System Safety Management Plan (SSMP), Preliminary Hazards Analysis (PHA), and Threats and Vulnerability Analysis (TVA), Certifiable Elements List (CEL), Certifiable Items List (CIL), Design Workshops and conformance reviews/ audits, Sensitive Security Information training and compliance, and assistance with the development of the final Safety and Security Certification Verification Report for the project. Micah assisted with all aspects of the safety and security certification of the project.

FDOT District 2, Bus Systems Safety and Security Review, Districtwide, FL

**Safety & Security.** Micah assisted in program management and facilitating the planning and implementation stages for the new EV plan. Involved in conducting site feasibility analyses, property owner and utility coordination, and facilitating the site host/service provider selection process. We will also complete an EV charging tax study on behalf of the State.

FDOT District 2, Transit Development Plan (TDP) Review, Districtwide, FL

**Safety & Security.** HDR provided technical expertise in reviewing major and minor annual updates of Transit

Development Plans (TDP) for transit agencies to maintain compliance and consistency with the Florida TDP rule and provided comments to the Department on annual TDP updates. Micah's duties included reviews of TDP major and minor annual updates and review of TDP guidance document developed for FDOT Central Office.

Bay Town Trolley, Public Transit Agency Safety Plans (PTASP) Development, Pensacola, FL

**Safety & Security.** HDR provided support on the development of Public Transit Agency Safety Plans (PTASP) for the Bay Town Trolley. Micah's responsibilities included managing the development of the PTASP and the Safety Management Systems (SMS), providing technical expertise on Hazard Risk Analysis and Mitigation, and delivering a draft PTASP for adoption by the agency.

Berkeley/Charleston/Dorchester Council of Governments, Low County Rapid Transit (LCRT) BRT, Charleston, SC

**Safety & Security.** HDR provided support on the development of safety and security documents for a new Bus Rapid Transit project. His project duties include development of a System Safety Management Plan (SSMP), Preliminary Hazards Analysis (PHA), and Threats and Vulnerability Analysis (TVA) for the projects. Micah assisted with the safety and security certification of the project.

## 2.5 SUBCONSULTANTS

HDR appreciates the City of Ocala's encouragement of DBE participation. Following a thorough assessment of the RFP requirements, we concluded that our team's depth of expertise, specialized transit experience, and multidisciplinary in-house local and national resources fully satisfy every element of the scope.

By executing the project entirely with HDR staff, the City benefits from a unified methodology, consistent technical oversight, and streamlined communication throughout the engagement. This structure eliminates the need for subconsultant coordination while delivering quality deliverables, responsive service, and a seamless project experience.



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## 2.6 REFERENCES & SIMILAR EXPERIENCE



### Bay County TPO, Bayway Comprehensive Operations Analysis (COA), BAY COUNTY, FL

In 2016, the Bay County TPO took over the local public transportation system. The change allowed for more direct oversight of the management of system while using a private company (FirstTransit) to operate the system. HDR was hired to provide guidance in meeting Federal Transit Administration (FTA) regulations, such as passenger-mile surveys and Disadvantaged Business Enterprise (DBE) compliance. After developing a familiarity with the transit system, the TPO hired HDR to complete a COA for the system. The COA provided a thorough look at the existing system to determine if the agency has the resources it needs to meet its mission and where improvements can be made to improve the efficiency of the system. Through a combination of evaluating each route, talking to existing customers, operators, and key stakeholders; and assessing the socioeconomic conditions in the county, different network scenarios were identified to improve the operation of the system. Each of these scenarios were tested in a dynamic scheduling software package to determine which one was the best fit for the service area. The desired alternative was selected and is moving towards implementation.

#### KEY TEAM MEMBER

- Brian Waterman, PhD, AICP



### Emerald Coast Regional Council, Emerald Coast (EC) Rider COA, OKALOOSA COUNTY, FL

HDR's Strategic Communications supported the Okaloosa County Emerald Coast (EC) Rider Transit System Comprehensive Operations Analysis, which aimed to improve transit operations, increase ridership of tourists and residents, and offer a robust, multimodal experience for the EC Rider Service Area. This project required the creation of a Public Involvement Plan that offered the public, existing riders, and stakeholders the opportunity to engage in the planning process and obtain information and project findings.

Specific branding was developed to help identify the project collateral and outreach items – "Count on this Ride". The brand was incorporated into materials developed and distributed to the community. HDR's strategic communications team developed a survey designed to illicit feedback from current and potential transit riders. To spread awareness of this survey and maximize coverage, yard signs and bus ads with QR codes were created. The QR codes led interested scanners to the EC Rider website where participants could access the survey online. Promotional graphics and announcements were periodically posted to Okaloosa County's Facebook account, the social media account that the city primarily uses to engage residents.

#### KEY TEAM MEMBERS

- Brian Waterman, PhD, AICP
- Todd Hemmingson, AICP
- Brad Thoburn
- Amber Lindsey
- Julie Gilliland

SUBCONSULTANTS & SIMILAR PROJECTS

Tab 2. Project Team Composition, Experience, Qualifications, and Past Performance



**Transit Authority of River City (TARC), COA and Long-Range Plan.** LOUISVILLE, KY

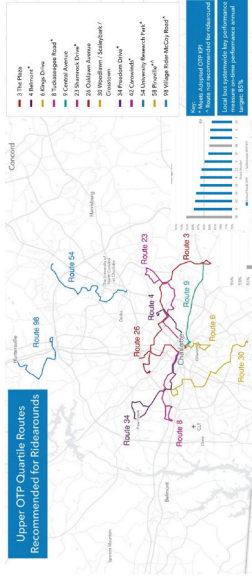
HDR is developing a short- and long-term public transportation plan for TARC that will set the course for transit and perhaps move the agency and the region towards implementing Mobility as a Service (MaaS).

In the short-term, the focus is on streamlining operations, efficiency, and performance which are all customer focused. Long- term options for where and how to operate will be considered based on the current system, funding model, and community needs. The plans also lay out how a sustainable, more modern bus transit system can operate in the future, including potential expanded resources needed to make it a reality.

Questions to be explored include: Given existing resources, should the system focus more on increasing ridership with additional service on major corridors or on geographic coverage? What type of service should be part of a long-range plan – more Bus Rapid Transit routes, streetcars, rail? Those topics and many others will be explored, with a robust public outreach and engagement program and platform spanning traditional meetings, face to face interviews, virtual meetings, and social media.

**KEY TEAM MEMBER**

- Todd Hemmingson, AICP



**Charlotte Area Transit System (CATS) Runtime Analysis.** CHARLOTTE, NC

HDR led a comprehensive runtime and timepoint analysis to improve system-wide on-time performance and operational efficiency. Only a small fraction of CATS bus routes were meeting the 85% on-time performance standard. Riders were experiencing delays, operators were navigating tight schedules, and the system needed a fresh look. Our team stepped in to help reimagine how timepoints and runtimes could better support reliability. We began by diving into the data—ridership trends, GTFS feeds, operator interviews, and field observations. Working closely with CATS staff and operators, we identified which timepoints were essential and which could be removed without compromising service quality. Our analysis led to the recommendation to remove 14 timepoints across 15 routes, while preserving those that served key functions.

On the runtime side, we didn't just adjust schedules—we built a framework for long-term reliability. We proposed new run times, refined layovers, and aligned headways with actual operating conditions. We also introduced strategies for traffic signal prioritization, stop consolidation, and cashless fare systems to reduce boarding delays and improve overall flow. We held multiple rounds of operator interviews, validated our findings with field data, and benchmarked CATS against peer agencies across the country. The result was a set of actionable, implementable strategies that CATS could move forward with confidence.

**KEY TEAM MEMBERS**

- Brian Waterman, PhD, AICP
- Savannah Hardisky



**North Central Texas Council of Governments, Collin County Transit Planning Study.** COLLIN COUNTY, TX

Serving as the Transit Planning Lead, HDR developed a comprehensive assessment of existing transit services, planning improvements, and local conditions. We conducted a transit service needs and market analysis for the entire county, including developing a transit propensity analysis using GIS to build an overall assessment of the need and demand for public transit today and over the next 10-20 years.

This work incorporated Location-Based Services data to understand regional travel patterns at a fine-grained level of detail, the findings of multiple prior studies, U.S. Census and other land use and demographic data, inputs from the regional travel demand model, and additional data. HDR synthesized these multiple inputs to create a single map with shading across the entire county to paint an easily understood visualization for the stakeholder committee and elected officials.

To examine future transit options, we developed three highly detailed transit scenarios with a comprehensive range of mobility options to demonstrate range of possible 'transit futures'. These scenarios also include planning level cost estimates for implementation and ongoing operation.

**KEY TEAM MEMBER**

- Todd Hemmingson, AICP

**ATTACHMENT 1 – REFERENCE FORM**

**Request for Proposals No. SUN/260384**  
**Comprehensive Operations Analysis (COA) for Suntran Services**

In order to be deemed responsive and responsible, Proposer must be able to provide: (a) proof of verifiable experience supplying and delivering products of a similar scope as those outlined in this Solicitation for a period of no less than five (5) years with agencies receiving State and Federal funds; and (b) at least three (3) public transit agency references who can attest to proposer's experience and services on similar services. For each reference identified, proposer must provide the name of the entity, contact person, phone number, email address. This **Attachment 1 – Reference Form** should be utilized to provide the foregoing information.

|                                          |                                                                                                                                                                                                                                                                |                |                                                                    |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--------------------------------------------------------------------|
| <b>Name of Entity:</b>                   | Bay County Transportation Planning Organization (TPO)                                                                                                                                                                                                          |                |                                                                    |
| <b>Contact Name:</b>                     | Lamar Hobbs                                                                                                                                                                                                                                                    | <b>Title:</b>  | Program Administrator                                              |
| <b>Address:</b>                          | 840 W 11th Street<br>Panama City, FL 32401                                                                                                                                                                                                                     |                |                                                                    |
| <b>Telephone:</b>                        | 850-248-8161                                                                                                                                                                                                                                                   | <b>E-Mail:</b> | <a href="mailto:lhobbs@baycountyfl.gov">lhobbs@baycountyfl.gov</a> |
| <b>Length of Business Relationship:</b>  | 8 years                                                                                                                                                                                                                                                        |                |                                                                    |
| Bayway Comprehensive Operations Analysis | <ul style="list-style-type: none"> <li>• Bayway Transit Development Plan (TDP) Major Update</li> <li>• Bayway TDP Annual Updates</li> <li>• Bayway Strategic Plan &amp; Micromobility Feasibility Analysis</li> <li>• Bayway FTA Compliance Support</li> </ul> |                |                                                                    |

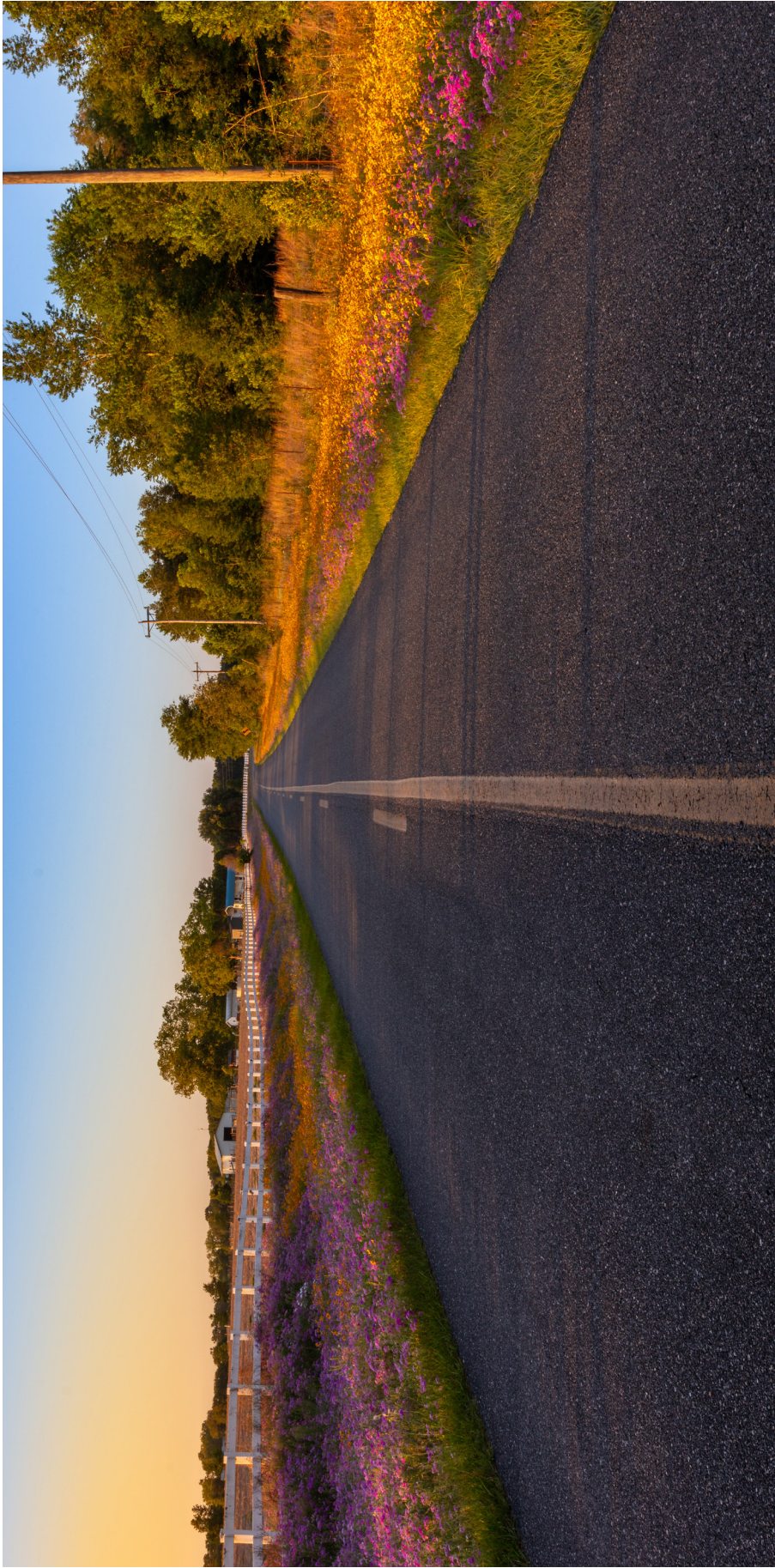
|                                         |                                             |                |                                                                                      |
|-----------------------------------------|---------------------------------------------|----------------|--------------------------------------------------------------------------------------|
| <b>Name of Entity:</b>                  | Charlotte Area Transit System (CATS)        |                |                                                                                      |
| <b>Contact Name:</b>                    | Patrick Hoskins                             | <b>Title:</b>  | Manager of Scheduling & Operations Planning                                          |
| <b>Address:</b>                         | 600 East Fourth Street, Charlotte, NC 28202 |                |                                                                                      |
| <b>Telephone:</b>                       | 704-302-5464                                | <b>E-Mail:</b> | <a href="mailto:Patrick.Hoskins@charlottenc.gov">Patrick.Hoskins@charlottenc.gov</a> |
| <b>Length of Business Relationship:</b> | 5 years                                     |                |                                                                                      |
| Runtime Analysis                        |                                             |                |                                                                                      |

|                                         |                                                                                                                                                                   |                |                                                                        |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|------------------------------------------------------------------------|
| <b>Name of Entity:</b>                  | Okaloosa-Walton County Transportation Planning Organization                                                                                                       |                |                                                                        |
| <b>Contact Name:</b>                    | Howard Vaneslow                                                                                                                                                   | <b>Title:</b>  | Transportation Disadvantaged Coordinator                               |
| <b>Address:</b>                         | PO Box 11399, Pensacola, FL 32524                                                                                                                                 |                |                                                                        |
| <b>Telephone:</b>                       | 850-332-7976, ext. 231                                                                                                                                            | <b>E-Mail:</b> | <a href="mailto:Howard.vaneslow@ecrc.org">Howard.vaneslow@ecrc.org</a> |
| <b>Length of Business Relationship:</b> | 8 years                                                                                                                                                           |                |                                                                        |
| Emerald Coast (EC) Rider COA            | <ul style="list-style-type: none"> <li>• EC Rider Transit Development Plan (TDP) Major Update</li> <li>• EC Rider Transit Provider Procurement Support</li> </ul> |                |                                                                        |

***If additional pages are needed, please attach additional sheets to this page.***

# 3

## PROJECT UNDERSTANDING, PROPOSED APPROACH & METHODOLOGY, IMPLEMENTATION PLAN, & PROJECT SCHEDULE



# 3

## OUR COMMITMENT TO QUALITY, EFFICIENCY, AND RELIABLE DELIVERY

HDR will implement the SunTran COA to meet the objectives, requirements, and specifications set forth in the RFP by the City of Ocala. We are aware of the project's objectives and existing conditions, and have a comprehensive plan for completing the work.

### 3.1 Our Commitment to Quality and Schedule

The capacity to accomplish work in a strict timeframe requires strong and experienced leaders backed by skilled team members. We are dedicated to providing sufficient time and effort to produce a quality product. Our team members were not only selected for their expertise, but also for their availability and successful history completing projects like this on time and within budget.

We have Central Florida roots with local knowledge, as well as a passion for this community and the availability to respond at a moment's notice. As a full service, employee-owned company, we also provide an extensive network of national transit resources, experts, and specialists available to address any technical issue that may arise.

Our goal is to provide the City of Ocala and SunTran with a technical product that is delivered on time, within budget, and free of errors.

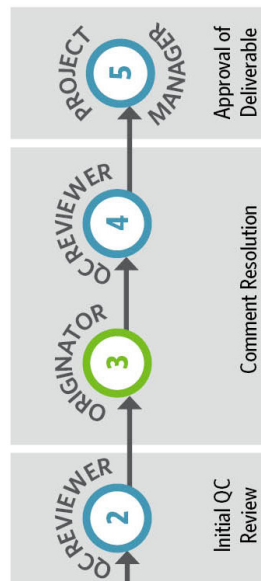
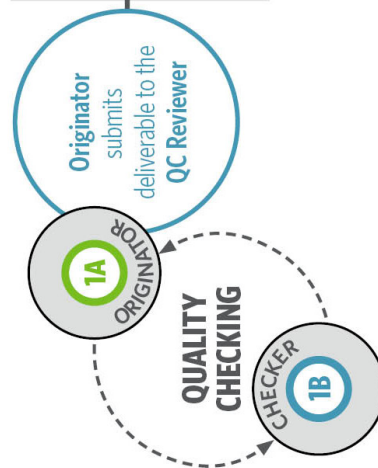
Monitoring and controlling this COA involves measuring progress toward the objectives, evaluating what needs to be done to reach the objectives, and taking appropriate actions. Through our experience on similar COA projects, we know the need for quality control procedures that address service delivery and project deliverables.

**Brad Thornburn will be the overall Quality Officer for this project.** Brad has over 30 years of experience and is well-versed to provide quality assurance and quality control oversight on this project. Prior to HDR, Brad was the FDOT Assistant Secretary for Strategic Development and the interim Executive Director for the FDOT Florida Rail Enterprise. He also was the Vice President of Planning at the Jacksonville Transportation Authority.

### Our Quality Assurance process includes:

- Regular meetings with City staff to verify we are providing services the way they want to be served.
- Propose alternative approaches to how assistance is provided and solicit feedback on those ideas.
- Regularly solicit performance ratings of HDR staff from City staff.

HDR will verify and clarify that all deliverables have been prepared in compliance with the Quality Control Plan prior to each submittal with proper documentation provided to the City of Ocala, as requested.



## 3.2 IMPLEMENTATION PLAN AND TIMEFRAME/PROJECT SCHEDULE

### 3.2 (a) Project Management Plan

HDR's approach to managing the COA for the City of Ocala and SunTran is grounded in clear communication, structured coordination, and disciplined technical oversight. **Our Project Manager, Brian Waterman, PhD, AICP**, will be your single point of contact, creating a cohesive management framework consistent with the expectations outlined in the RFP and Scope of Services. Our Project Management approach is the foundation for project success and we have internal project management tools that allow our team to streamline efficient coordination, collaboration, communication, and documentation. This consistent use of our management system contributes to the overall quality in meeting your goals for this project.

**We provided a full approach to the below items (b-h) in Tab 1. Project Scope of Work (pgs. 1-11):**

- b. Staff and Public Input
- c. Data Analysis and Evaluation of Existing Services
- d. Mobility and Regional Needs Analysis
- e. Recommended Agency Service Performance Standards/Policies
- f. Services Implementation Plan.
- g. In-House Operations and Maintenance Cost and Feasibility Study Analysis.
- h. Final COA Report, Presentation of Findings, and Executive Summary

#### Internal Project Management Tools

- Bentley ProjectWise File System
- SharePoint/OneDrive
- Work Plan
- Oracle E-Business Suite (EBS)/Business Intelligence
- Earned Value Reporting

#### Innovative Tools and Solutions

The planning, engineering, and GIS landscape is changing with new technologies, artificial intelligence (AI), customer needs, and a wealth of available data. Our team will bring experience in these areas with cutting edge tools, such as **UrbanFootprint and Replica**, to support planning efforts. We can also deploy unmanned aerial vehicles (drones) to help with evaluating hotspots or safety concerns along a route from a different perspective. Advances in data analytics means our team is able to use a variety of datasets to identify trends and community needs to support grant applications. All these tools allow us to develop unique and customizable solutions to support the evolving mobility needs in the community.

#### Communication Through the Life of the Project

**HDR will work with the City and SunTran to establish** the expectations for project success and communications. The key to obtaining a singular mindset among the participants is effective communication, most notably from the Project Manager. In-person meetings can expedite the decision-making process and reduce the chances of misunderstandings. For complex issues, the HDR team will supplement a project with regularly scheduled meetings with City staff online or in person. Standard kickoff and review meetings will be scheduled and attended. However, recognizing the need for quick action and decisions is a critical skill of our Project Manager. Showing up to handle issues quickly can make a difference in a successful project.

#### Identifying Steps for Problem-Solving and Meeting Scope and Schedule

HDR will work closely with SunTran to monitor the scope and schedule progress, adjusting staff resources to create a constant work flow, while also maintaining the capability to immediately respond to project needs. We are committed to assigning properly qualified staff along with the proper number of staff to optimize time and costs to support SunTran. HDR uses **Microsoft Project** to monitor schedule performance. Project schedules are developed at the proposal stage and are updated regularly throughout the life of the project.

Personnel assignments are adjusted to meet the schedule. In addition, weekly work planning meetings allow managers to address scheduling conflicts and budget management throughout the process. As a result, HDR is able to consistently meet schedule and budget goals.

### 3.2 (i) SunTran Staff Involvement

As we move from analysis to implementation, we'll be working hand-in-hand with key SunTran staff to confirm that every recommendation feels realistic, workable, and aligned with how the system operates day-to-day. Key touch-points includes:

#### Planning & Scheduling Team:

We'll lean on your planning and scheduling staff to help fine-tune routing ideas, validate travel times, and shape practical run cuts. Their knowledge of how the current system behaves provides verification that the new system is something SunTran can deliver.

#### Operations Managers & Dispatch Supervisors:

Operators are the face of the system and know intrinsically how it works in the real-world. Their knowledge of pull-outs, recovery times, relief points, and daily operational challenges helps us ground recommendations in reality and avoid surprises during roll-out.

#### Maintenance & Fleet Staff:

As service changes take shape, maintenance leadership will help us understand fleet availability, vehicle assignments, and any facility or equipment constraints. Their insight grounds the service plan with what your fleet and maintenance operation can support today and as SunTran evolves.

#### Customer Service, Marketing & Administrative Teams:

When it's time to share changes with riders and community partners, we'll collaborate with your customer-facing staff to update system materials, craft clear messaging, and prepare for public outreach. Their role is essential in helping riders understand what's changing and why those changes matter.

# 3.3 PROJECT SCHEDULE

Our team has developed a detailed schedule designed to meet the City of Ocala/SunTran's **9-month timeframe** for completing the Comprehensive Operational Analysis (COA). To maintain timely delivery, we have identified key milestones and decision points across the full duration of the project. We recognize that the official start date will be based on issuance of the Notice to Proceed (NTP), and the schedule accounts for SunTran and City review periods, coordination with the Transit Steering Committee (TSC), and public engagement windows that may be influenced by holidays or seasonal constraints.

Throughout the process, the City of Ocala's staff will be engaged to provide feedback on data collection processes employed and have opportunities to review deliverables prior to submission to stakeholders, decision-makers, and the TSC. Thanks to our extensive experience conducting COAs and our familiarity with the methodology, data needs, and stakeholder processes, we are fully equipped to begin system analysis, fieldwork, and data validation immediately upon NTP. This allows for an efficient and informed start to the project.

**The project consists of three major phases, each supported by a robust public and stakeholder engagement strategy.**

## Phase One | Current System Assessment | Months 1–4

During this phase, our team will conduct **comprehensive data collection, field verification, and system performance** evaluation consistent with the Scope of Work. This includes review of existing planning documents, ridership and operational data, on-board and stop-level data collection, and interviews with SunTran staff.

**A dedicated field team will be deployed early in the phase** to observe system operations firsthand and engage with operators, supervisors, and key stakeholders. Preliminary findings will be shared with SunTran staff and the TSC to

confirm emerging themes and issues. **Public engagement activities** will be scheduled within this phase to capture community perspectives prior to developing recommendations. A full assessment report will be delivered at the conclusion of Phase One.

## Phase Two | Service and Network Redesign | Months 3–7

This phase overlaps with Phase One to maintain project momentum and allow early analytical findings to inform the development of service scenarios.

Building on the existing route network, performance data, and the system assessment, our team will **develop a series of short-term and mid-range service concepts** that address system needs, improve operational efficiency, and support customer-focused mobility. Each scenario will be evaluated for cost, productivity, span of service implications, and alignment with SunTran's goals. SunTran staff and the TSC will review draft scenarios through iterative work sessions. A **dedicated field effort will be used** to refine route changes, assess stop spacing and consolidation, and verify feasibility of proposed modifications. A **preferred network design will be developed**, along with an **implementation and funding strategy**. Public and **stakeholder engagement** will be conducted during this phase to present proposed changes, gather feedback, and incorporate community priorities.

## Phase Three | Implementation Strategy & Final Reporting | Months 7–9

The final phase will focus on **refining the recommended service plan** based on feedback from SunTran staff, the TSC, stakeholders, and the public. The implementation plan will include short-term recommendations (Years 1–2) and mid-range recommendations (Years 3–5), along with **operating and capital cost estimates, scheduling considerations, and resource requirements**. This phase also includes development

of **performance standards and policies**, as outlined in the Scope of Work, as well as the in-house vs. contracted operations feasibility assessment. All final deliverables—including the Final COA Report, Executive Summary, and presentation materials—will be prepared and delivered during this phase.

**Our team brings a significant advantage to this COA effort thanks to our completion of the SunTran Transit Development Plan (TDP) Major Update in 2022.**

This recent and comprehensive work gives us:

- Deep familiarity with SunTran's existing route network, service structure, and operating environment
- A strong understanding of community travel patterns, transit needs, and stakeholder priorities
- Insight into demographic and land-use trends already influencing system performance
- Established working relationships with SunTran staff, enabling more efficient coordination and issue resolution
- A head start on identifying key concerns, allowing the team to focus immediately on targeted improvements rather than spending time rediscovering baseline conditions

Because of this prior experience, we can **accelerate analysis**, focus on the most **impactful issues** sooner, and develop more nuanced, actionable service recommendations that **build directly on recent planning work**.

**A detailed nine-month schedule is included on the following page.**



City of Ocala | RFP#: SUN/260384

Tab 3. Project Understanding, Proposed Approach and Methodology, Implementation Plan, and Project Schedule

| Phase                                   | Task                                   | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 | Month 9 |
|-----------------------------------------|----------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Phase 1 - Current System Assessment     | Kickoff, PMP & Schedule                |         |         |         |         |         |         |         |         |         |
|                                         | Data Review & Existing Conditions      |         |         |         |         |         |         |         |         |         |
|                                         | Fieldwork: Ridechecks & Observations   |         |         |         |         |         |         |         |         |         |
|                                         | Public & Staff Input                   |         |         |         |         |         |         |         |         |         |
|                                         | Data Processing & Validation           |         |         |         |         |         |         |         |         |         |
| Phase 2 - Service & Network Design      | System Assessment Report               |         |         |         |         |         |         |         |         |         |
|                                         | Performance Standards & Policies       |         |         |         |         |         |         |         |         |         |
|                                         | Concept Development                    |         |         |         |         |         |         |         |         |         |
|                                         | Scenario Modeling & Evaluation         |         |         |         |         |         |         |         |         |         |
|                                         | Field Verification                     |         |         |         |         |         |         |         |         |         |
|                                         | Preferred Network Design Development   |         |         |         |         |         |         |         |         |         |
|                                         | Implementation & Funding               |         |         |         |         |         |         |         |         |         |
|                                         | Public & Staff Input                   |         |         |         |         |         |         |         |         |         |
| Phase 3 - Implementation Strategy & COA | Refinement & Final Scenario            |         |         |         |         |         |         |         |         |         |
|                                         | In-House vs. Contracted Feasibility    |         |         |         |         |         |         |         |         |         |
|                                         | Implementation Strategy                |         |         |         |         |         |         |         |         |         |
|                                         | Draft COA Report                       |         |         |         |         |         |         |         |         |         |
|                                         | Final COA Report                       |         |         |         |         |         |         |         |         |         |
|                                         | Presentation & Governing Body Meetings |         |         |         |         |         |         |         |         |         |



= TSC Meeting



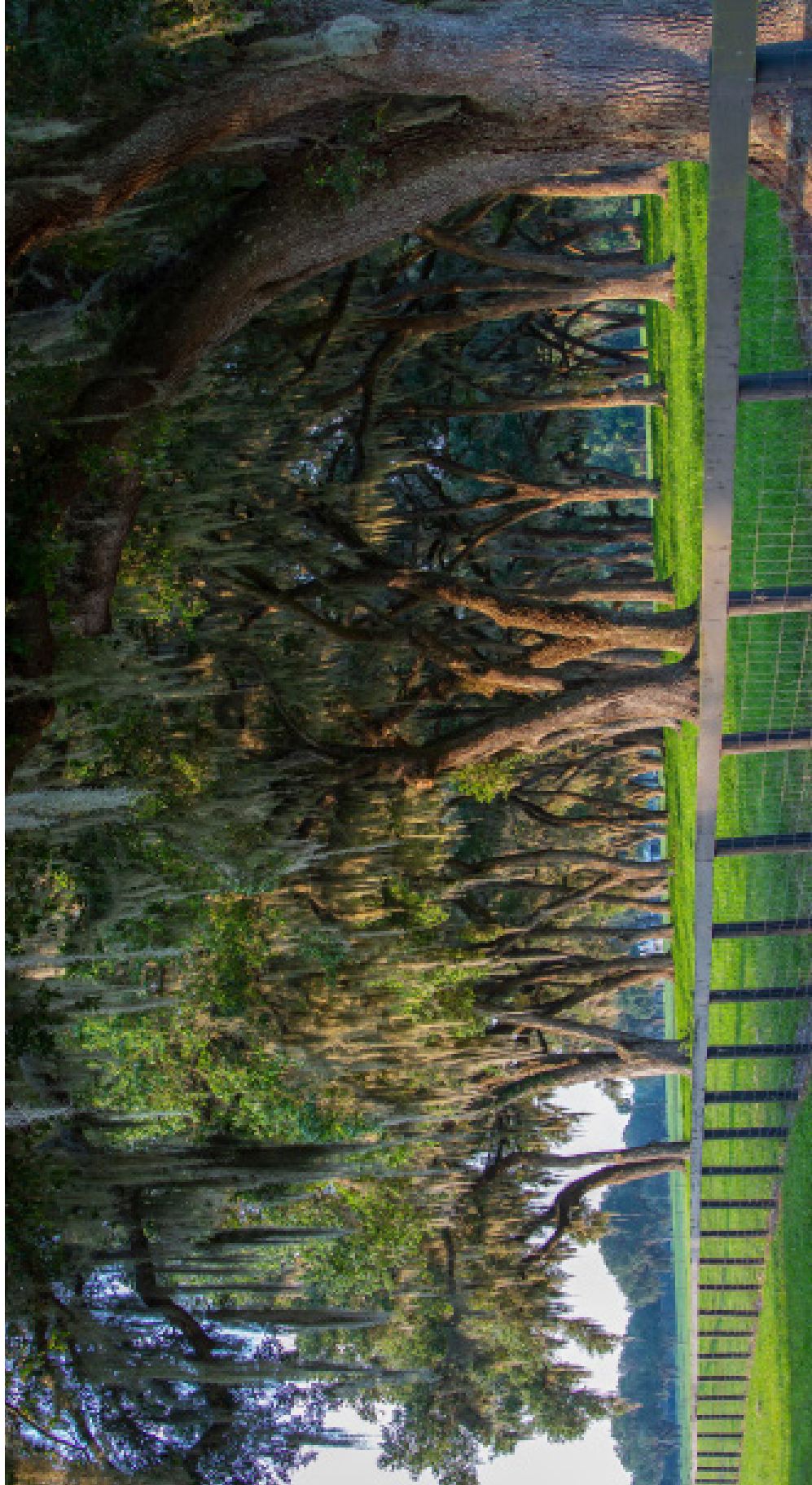
= Deliverable



= Staff Reviews

# 4

## PRICE PROPOSAL AND OTHER FORMS



## 4 PRICE PROPOSAL

To support the City of Ocala in evaluating the full cost of this engagement, we have prepared a comprehensive, lump sum price proposal that reflects all direct and indirect costs associated with delivering the tasks outlined in the RFP and Exhibit A – Scope of Work. A detailed breakdown of each task is included on the following pages to clearly show how resources, work effort, and supporting services align with the overall project approach.

As part of this proposal, our direct costs include the use of our scheduling software and public notification/reproduction services to support efficient project delivery. If the City prefers to provide access to its own scheduling or public notification/reproduction resources, these costs can be reduced accordingly.

### Optional Services

In addition to the COA, we can offer the following optional services that fit the scale and needs of SunTran. These additions are designed to help implement the COA recommendations and support the growth of the transit network by focusing on financial strategy, operational sustainability, and long term readiness:

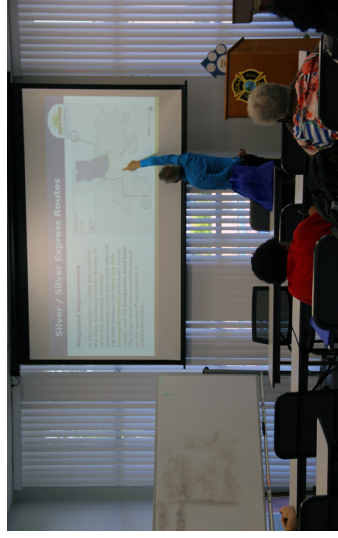
- **Focused Station/Stop Area Planning:** Evaluate a select number of high impact stops or transfer points to understand land use opportunities, improve accessibility, and explore small scale transit supportive development potential.
- **Zero Emission Readiness Snapshot:** Assess fleet, facility, and charging considerations to help Ocala continue to transition to a low or zero emission fleet.

- **Enhanced Public Engagement Support:** Provide clear, people centered communications and outreach materials that help the community understand proposed service changes and how they support local mobility goals.

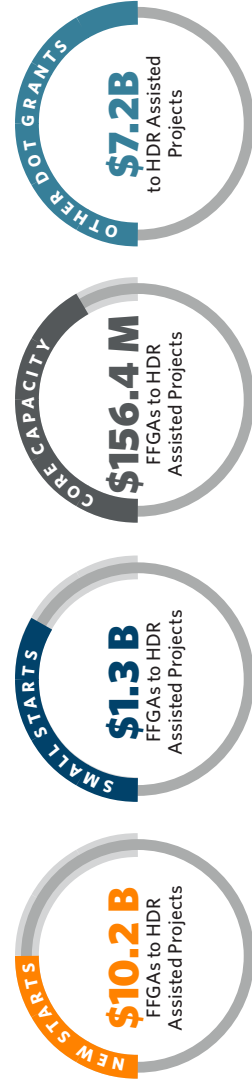
- **Financial & Grant Assistance:** Offer strategic guidance on grant positioning, funding opportunities, and investment analysis to help Ocala maximize available resources and support implementation of COA recommendations.

- **Support for Ocala's Next Transit Development Plan (TDP) Major Update:** Build upon the findings of the COA to help initiate or inform Ocala's next TDP Major Update. This can include early data assembly, identify strategic priorities, and develop preliminary recommendations that create a smooth hand-off into the full TDP process.

A **schedule of fully loaded hourly rates** for the personnel who may support these optional tasks is included on the second page of the price proposal in this section.



### BY THE NUMBERS: OUR FEDERAL FUNDING SUCCESS



## Exhibit C - Consultant Proposal

**CONTRACT# SUN/260384**

| Task Description                                                   | HDR              |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    | Total Hours | Total Fee          |
|--------------------------------------------------------------------|------------------|------------------------|----------|----------|----------------------|----------------|-----------|-------------|-------------------------|----------------|------------|--------------------|----------------|------------------|--------------------|-------------|--------------------|
|                                                                    | Task Description |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    | Project Manager  | Deputy Project Manager | PG       | QA/QC    | Financial Consultant | O&M Consultant | Economist | GIS Manager | Strategic Communication | Senior Planner | Planner 1  | Start Comm Support | GIS Specialist | Graphic Designer | Secretary/Clerical |             |                    |
| <b>1 Study Initiation/Project Management Plan and Schedule</b>     |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| 1-1 Project Management Plan                                        | 4                | 4                      |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    | 8           | \$2,468.12         |
| 1-2 Project Schedule                                               | 4                | 4                      |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    | 8           | \$2,468.12         |
| 1-3 Monthly Reporting & Invoicing                                  | 18               |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  | 10                 | 28          | \$5,119.00         |
| 1-4 Transit Steering Committee                                     | 10               | 10                     | 6        |          | 4                    |                |           |             | 4                       | 16             |            |                    |                |                  |                    | 66          | \$15,014.54        |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| <b>Subtotal:</b>                                                   | <b>36</b>        | <b>18</b>              | <b>6</b> | <b>0</b> | <b>4</b>             |                |           |             | <b>0</b>                | <b>4</b>       | <b>16</b>  | <b>0</b>           | <b>0</b>       | <b>0</b>         | <b>10</b>          | <b>110</b>  | <b>\$25,069.78</b> |
|                                                                    | \$8,026          | \$7,093                | \$1,957  | \$0      | \$928                | \$0            | \$0       | \$0         | \$677                   | \$3,576        | \$1,706    | \$0                | \$0            | \$0              | \$1,106            |             |                    |
| <b>2 Staff and Public Input</b>                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| 2-0 Public Input                                                   | 6                | 4                      |          |          |                      |                |           |             |                         |                |            |                    |                | 6                |                    | 88          | \$13,253.42        |
| 2-1 Data Collection                                                | 6                | 4                      |          |          |                      |                |           |             | 32                      |                | 16         | 40                 |                |                  |                    | 34          | \$6,407.78         |
| 2-2 Review of Existing, Planned, Future Conditions                 | 6                | 4                      |          |          |                      |                |           |             |                         | 8              | 12         |                    |                |                  |                    | 30          | \$5,981.30         |
| 2-3 Service Area Operations                                        | 6                | 4                      |          |          |                      |                |           |             |                         | 8              | 16         |                    |                |                  |                    | 34          | \$6,407.78         |
| 2-4 Route and Stop-by-Stop Surveys/Data Collection                 | 6                | 4                      |          |          |                      |                |           |             |                         | 28             | 32         |                    |                |                  |                    | 70          | \$12,583.30        |
| 2-5 Data Collection and Supervision                                | 6                | 4                      |          |          |                      |                |           |             |                         | 8              | 16         |                    |                |                  |                    | 34          | \$6,407.78         |
| 2-6 Quality Assurance                                              | 6                | 4                      |          | 4        |                      |                |           |             |                         |                |            |                    |                |                  |                    | 14          | \$4,432.06         |
| 2-7 Data Processing                                                | 6                | 4                      |          |          |                      |                |           | 10          |                         | 8              | 8          |                    | 26             | 6                |                    | 68          | \$10,688.06        |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| <b>Subtotal:</b>                                                   | <b>48</b>        | <b>32</b>              | <b>0</b> | <b>4</b> | <b>0</b>             |                |           | <b>10</b>   | <b>32</b>               | <b>68</b>      | <b>100</b> | <b>40</b>          | <b>26</b>      | <b>12</b>        | <b>0</b>           | <b>372</b>  | <b>\$66,161.48</b> |
|                                                                    | \$10,702         | \$12,611               | \$0      | \$1,518  | \$0                  | \$0            | \$1,582   | \$5,419     | \$15,197                | \$10,662       | \$4,240    | \$2,871            | \$1,361        | \$0              | \$0                |             |                    |
| <b>3 Data Analysis and Evaluation of Existing Service</b>          |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| 3-1 Data Analysis and Evaluation of Existing Service               | 4                | 4                      |          | 2        |                      |                |           | 4           |                         | 8              | 20         | 0                  | 8              | 4                |                    | 54          | \$9,117.14         |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| <b>Subtotal:</b>                                                   | <b>4</b>         | <b>4</b>               | <b>0</b> | <b>2</b> | <b>0</b>             |                |           | <b>4</b>    | <b>0</b>                | <b>8</b>       | <b>20</b>  | <b>0</b>           | <b>8</b>       | <b>4</b>         | <b>0</b>           | <b>54</b>   | <b>\$9,117.14</b>  |
|                                                                    | \$892            | \$1,576                | \$0      | \$759    | \$0                  | \$0            | \$633     | \$0         | \$1,788                 | \$2,132        | \$0        | \$0                | \$883          | \$454            | \$0                |             |                    |
| <b>4 Mobility and Regional Needs Analysis</b>                      |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| 4-1 Mobility and Regional Needs Analysis                           | 4                | 4                      | 0        | 2        |                      |                | 4         |             | 16                      | 24             |            | 0                  | 8              | 8                |                    | 70          | \$11,785.14        |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| <b>Subtotal:</b>                                                   | <b>4</b>         | <b>4</b>               | <b>0</b> | <b>2</b> | <b>0</b>             |                | <b>4</b>  | <b>0</b>    | <b>16</b>               | <b>24</b>      | <b>24</b>  | <b>0</b>           | <b>8</b>       | <b>8</b>         | <b>0</b>           | <b>70</b>   | <b>\$11,785.14</b> |
|                                                                    | \$892            | \$1,576                | \$0      | \$759    | \$0                  | \$0            | \$633     | \$0         | \$3,576                 | \$2,559        | \$0        | \$0                | \$883          | \$907            | \$0                |             |                    |
| <b>5 Recommended Agency Service Performance Standards/Policies</b> |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| 5-1 Recommended Agency Service Performance Standards/Policies      | 4                | 4                      | 0        | 4        |                      |                | 4         |             | 16                      | 32             |            | 0                  | 12             | 12               |                    | 88          | \$14,292.48        |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
|                                                                    |                  |                        |          |          |                      |                |           |             |                         |                |            |                    |                |                  |                    |             |                    |
| <b>Subtotal:</b>                                                   | <b>4</b>         | <b>4</b>               | <b>0</b> | <b>4</b> | <b>0</b>             |                | <b>4</b>  | <b>0</b>    | <b>16</b>               | <b>32</b>      | <b>32</b>  | <b>0</b>           | <b>12</b>      | <b>12</b>        | <b>0</b>           | <b>88</b>   | <b>\$14,292.48</b> |



### CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents of all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, United States Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Organization: HDR Engineering, Inc.

Street address: 315 E. Robinson Street Suite 400

City, State, Zip: Orlando, FL 32801

Jeffrey B. Arms

CERTIFIED BY: (type or print)

Vice President

TITLE:

*Jeffrey Arms*

3/16/26  
(date)



## DISADVANTAGED BUSINESS ENTERPRISE (DBE) AND NON-DBE SUBCONTRACTOR UTILIZATION FORM

This form is intended to capture the prime contractor's actual and/or anticipated use of certified Disadvantaged Business Enterprises<sup>1</sup> (DBEs) as subcontractors and the estimated dollar amount of each subcontract. Prime contractors are to complete this form and include it with their bid or proposal package. Prime contractors should also maintain a copy of this form on file.

|                                                                                 |                                                                    |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------|
| <b>Solicitation Number</b><br>RFP# SUN/260384                                   | <b>Project Name</b><br>SunTran's Comprehensive Operations Analysis |
| <b>Name of Prime Contractor</b><br>HDR Engineering, Inc.                        |                                                                    |
| <b>Mailing Address</b><br>315 E. Robinson Street Suite 400<br>Orlando, FL 32801 |                                                                    |
| <b>Telephone Number</b><br>407.420.4200                                         | <b>E-Mail Address</b><br>jeff.arms@hdrinc.com                      |

The prime contractor shall make assertive good faith efforts to utilize as many DBEs as possible and, to this end, the prime contractor shall inform each subcontractor of this requirement. Please select the appropriate option below as it relates to the prime contractor's ability or inability to satisfy the DBE requirements on this contract:

- ☒ **OPTION 1.** The Bidder/Offoror cannot commit to any DBEs since the work will not be subcontracted.
- ☐ **OPTION 2.** The Bidder/Offoror is committed to a minimum of 2.55% DBE utilization on this contract.
- ☐ **OPTION 3.** The Bidder/Offoror is unable to meet the 2.55% DBE utilization goal and has submitted documentation demonstrating its good faith efforts to do so (i.e. copies of each DBE and non-DBE subcontractor quote submitted; description of the information provided to targeted DBEs regarding the specifications for the related portions of work; names, addresses, and phone numbers of DBEs contacted, etc.)

<sup>1</sup> A DBE is a for-profit small business that is at least 51% owned (or, if a corporation, the 51% of the stock is owned) and whose management and daily business operations are controlled by an individual who is a citizen (or lawfully admitted permanent resident) of the United States and who has been subjected to racial or ethnic prejudice or cultural bias within American society because of his or her identity as members of any of the following groups: Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent Asian Americans, Women, and any additional groups whose members are designated as socially and economically disadvantaged by the United States Small Business Administration. All DBE firms must be certified by the Unified Certification Program to be counted on this form.



## DISADVANTAGED BUSINESS ENTERPRISE (DBE) AND NON-DBE SUBCONTRACTOR UTILIZATION FORM

Please provide the following information for ALL participating subcontractors (both DBE and non-DBE subcontractors) for the above referenced project, if applicable. You may use additional sheets if necessary.

| NAME AND ADDRESS OF<br>SUBCONTRACTOR PERFORMING WORK | DBE STATUS       |         | DESCRIPTION OF COMMODITY,<br>MATERIAL, OR SERVICE TO BE<br>PROVIDED | PRICE AGREED TO BE<br>PAID TO<br>SUBCONTRACTOR |
|------------------------------------------------------|------------------|---------|---------------------------------------------------------------------|------------------------------------------------|
|                                                      | DBE <sup>2</sup> | Non-DBE |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |
|                                                      |                  |         |                                                                     |                                                |

<sup>2</sup> All DBEs must be certified by the Unified Certification Program in order to be counted as DBE subcontractors. If not certified, select Non-DBE.



## DISADVANTAGED BUSINESS ENTERPRISE (DBE) AND NON-DBE SUBCONTRACTOR UTILIZATION FORM

|                                                                          |  |
|--------------------------------------------------------------------------|--|
| Dollar Amount of Work to be Completed by Non-DBE Subcontractors          |  |
| Dollar Amount of Work to be Completed by Certified DBE Subcontractors    |  |
| Total (This amount shall equal the amount proposed in your Bid proposal) |  |

**BIDDER'S/OFFEROR'S CERTIFICATION:** The above information is true and complete, to the best of my knowledge and belief. The undersigned understands and agrees that if awarded the contract, this Utilization Form shall be attached thereto and become a part thereof. Failure to provide accurate information or exercise positive, good faith efforts (as defined by the City of Ocala's DBE Program) may result in being considered non-responsive to the City's solicitation requirements. The City Contracting Officer reserves the right to recommend an audit to verify the information submitted.

  
Signature of Authorized Representative

Vice President

Title of Authorized Representative

Jeffrey B. Arms

Printed Name of Authorized Representative

3/16/2026

Date



315 E. Robinson St., Ste. 400  
Orlando, FL 32801  
407.420.4200

**hdrinc.com**

We practice increased use of sustainable materials and reduction of material use.

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