

San Joaquin
Council of Governments
FY 2021-2022
Overall Work Program

San Joaquin
Council of Governments

Draft February 25, 2021

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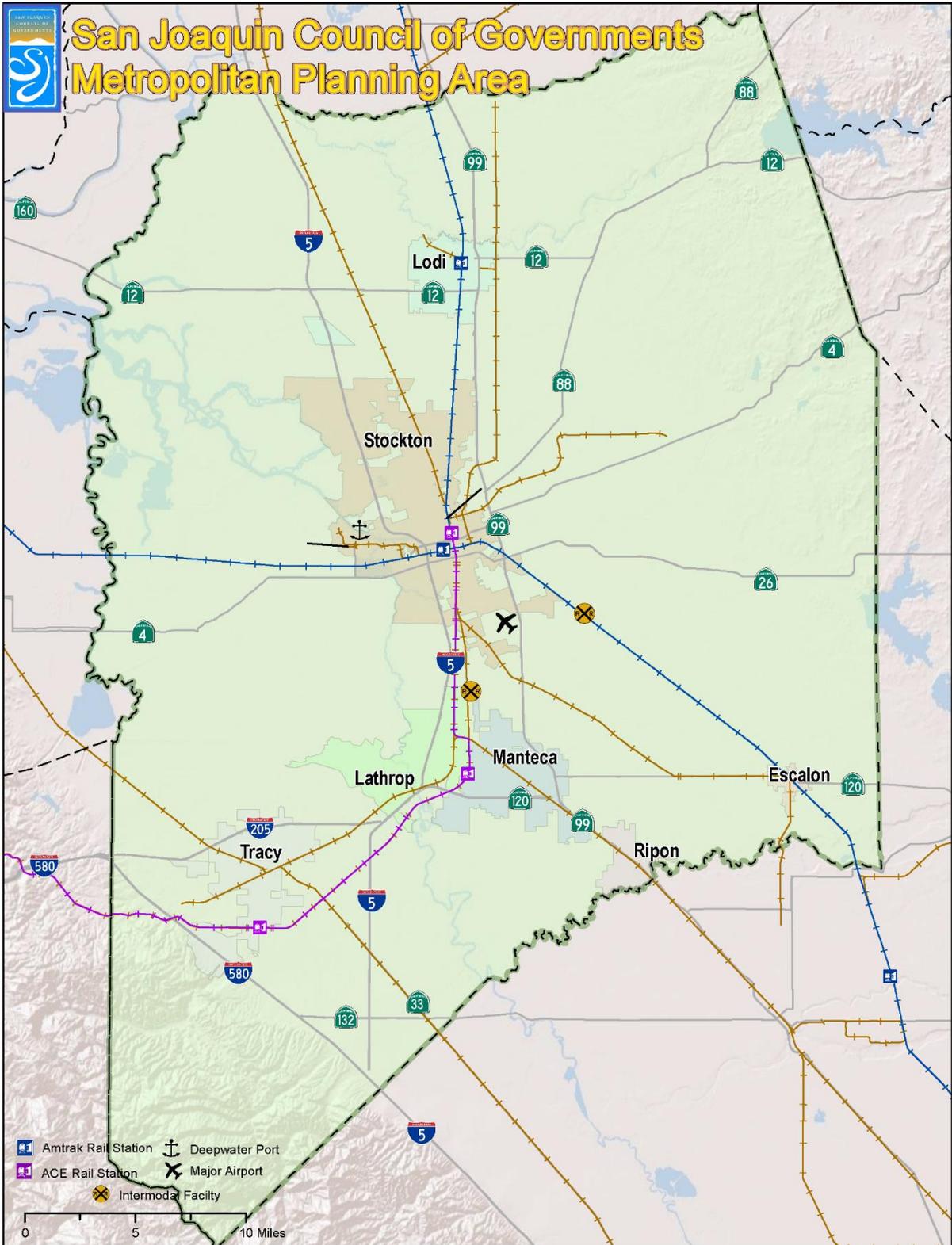
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**THE SAN JOAQUIN COUNCIL OF GOVERNMENTS
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SAN JOAQUIN COUNCIL OF GOVERNMENTS PROFESSIONAL STAFF

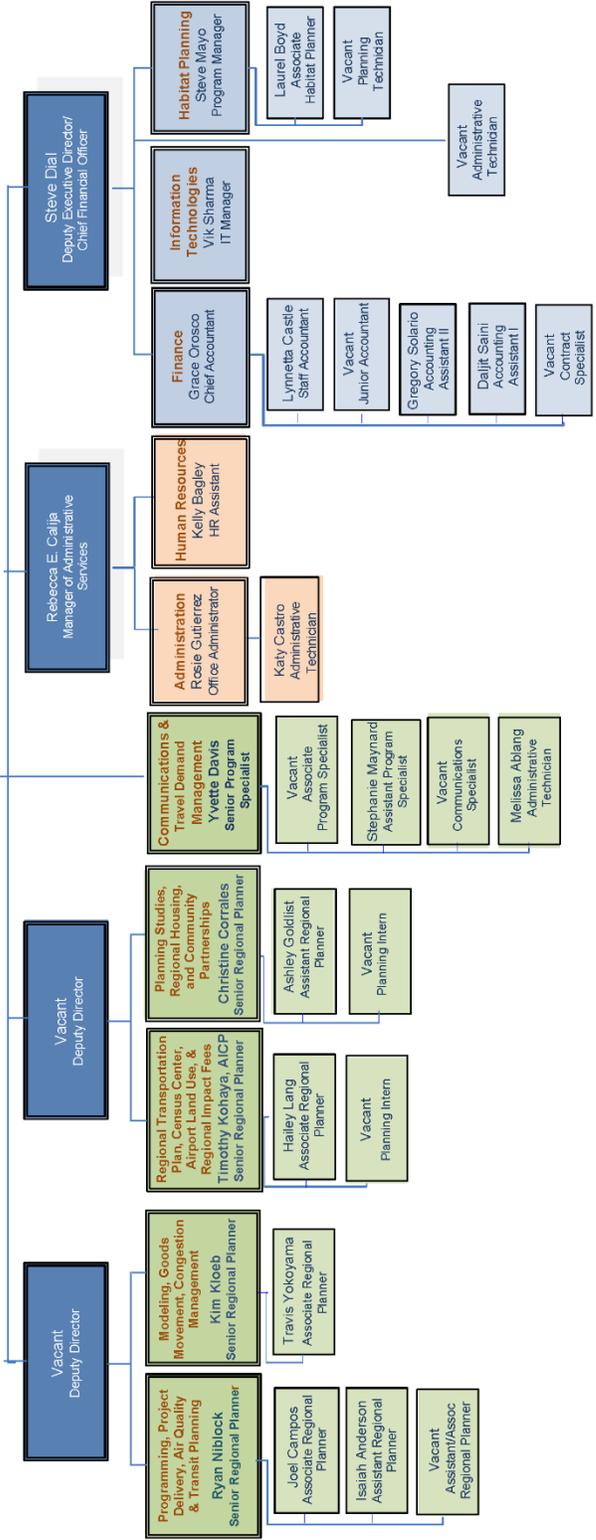
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**SJCOG
Board of Directors**

Executive Committee

**Diane Nguyen, AICP
Executive Director**



SAN JOAQUIN COUNCIL OF GOVERNMENTS OVERALL WORK PROGRAM

I. THE SAN JOAQUIN COUNCIL OF GOVERNMENTS

The San Joaquin Council of Governments is a Joint Powers Agency created in 1968 by the County of San Joaquin and the Cities of Stockton, Lodi, Manteca, Tracy, Ripon and Escalon. In 1991, the newly incorporated City of Lathrop signed onto the Joint Powers Agreement. The role of the Council of Governments is to serve the functions designated by signatories to the agreement. Generally, SJCOG'S role is to foster intergovernmental coordination, both within San Joaquin County, as well as with neighboring jurisdictions, the other regional agencies for the San Joaquin Valley, the State of California and various Federal agencies. The specific roles of the Council of Governments are described below. A fifteen-member Board composed of twelve locally elected officials and three ex-officio members directs the Council of Governments. The Board has three members of the San Joaquin County Board of Supervisors, three members of the Stockton City Council and one member from each of the County's six other cities. The ex-officio members are a Port of Stockton of Commissioner, a San Joaquin Regional Transit District Board member, and Caltrans District 10's Director. Under the direction of the Executive Director, a professional staff carries out the activities of the Council of Governments. The Board and staff are identified on the inside cover of this document.

In accordance with Title VI of the Civil Rights Act of 1964, as amended, the San Joaquin Council of Governments assures that it is in compliance with all requirements of 49 CFR part 21; FTA circular 4702.1 "Title VI Program Guidelines for Federal Transit Administration Recipients"; and other applicable directives, so that no person in the United States, on the basis of race, color, national origin, creed, sex, or age will be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination in any program or activity particularly in the level and quality of mass transportation services and mass transportation-related benefits for which the Applicant receives Federal financial assistance from the U.S. DOT or FTA.

II. THE ROLES OF THE SAN JOAQUIN COUNCIL OF GOVERNMENTS

Since 1969, the Council of Governments has filled a variety of niches for its member jurisdictions. A short description of each of these roles is contained below:

A. Regional Transportation Planning Agency (RTPA)

In 1973, SJCOG was recognized as the Regional Transportation Planning Agency for San Joaquin County. Initially the designation related solely to the administration and allocation of Transportation Development Act (TDA) funds for public transit and possible road and street projects. However, over time the RTPA designation has expanded such that SJCOG is the agency responsible for adopting a Regional Transportation Plan (RTP) and a Regional Transportation Improvement Program (RTIP) that programs state and federal funds within the region's boundaries. In addition, the designation gives SJCOG planning and coordination responsibilities over most federal and state funding programs for transportation administered by the State of California.

B. Metropolitan Planning Organization (MPO)

Metropolitan Planning Organization is a federal designation identifying the San Joaquin Council of Governments as the agency responsible for carrying out federal guidelines, regulations and statutes for planning and coordination. SJCOG's region is designated as a Transportation Management Area and SJCOG is carrying out state and federal Congestion Management functions.

C. Airport Land Use Commission (ALUC)

On August 7, 1973, the Board of Supervisors and the Mayor of each city designated the San Joaquin Council of Governments as the appropriate agency to assume the planning responsibilities of the Airport Land Use Commission. The ALUC is responsible for preparing and enforcing an Airport Land Use Compatibility Plan (ALUCP) around each public access airport in San Joaquin County. The purpose of the ALUCP is to maximize public safety and long term effectiveness of airports by eliminating the use of conflicting land uses. A partial update of the ALUCP was completed in June, 2009 which included all public access airports except the Stockton Metropolitan Airport. An update to the ALUCP to include Stockton Metropolitan Airport was completed and adopted in fiscal year 2015/16.

D. Census Data Center (CDC)

The State of California participates in a national State Data Center Program with the U.S. Bureau of the Census and by Maintaining the legislatively-mandated State Data Center (SDC). The SDC is located within the Demographic Research Unit of the California Department of Finance. The San Joaquin Council of Governments is an affiliate data center within the California State Data Center Program. In this role, SJCOG receives reports and documentation from the U.S. Bureau of the Census. SJCOG generates numerous reports using the most current census data available. SJCOG also assists the Census Bureau in various special census projects.

In addition, SJCOG works with the State of California Department of Finance, which is responsible for annual updates on California and local demographics. Starting in 2007, and continuing through this year, SJCOG partnered with University of the Pacific's - Center for Business and Policy Research to provide Data Center services and various demographic and economic studies for both internal use and dissemination to the public and other stakeholders through a wide variety of mediums.

E. Congestion Management Agency (CMA)

Following approval of Proposition 111 by California state voters in June, 1990, SJCOG was named the Congestion Management Agency for San Joaquin County in 1991. SJCOG adopted its first Congestion Management Program (CMP) in November of 1991. As of 2020, SJCOG has chosen to "opt out" of the state CMP, but continues to implement the required the Federal Congestion Management Process. The current update to the CMP was adopted by the SJCOG Board of Directors in April 2018. A new update will be completed by the end of FY 20-21. This OWP will continue implementation and monitoring activities in this area.

F. Local Transportation Authority (LTA)

In November of 1990, San Joaquin County voters passed Measure K, a ½ cent increase in sales tax to support specific transportation improvements. SJCOG is designated the Local Transportation Authority, the agency responsible for administering the sales tax program and delivering the projects identified in the Measure's Expenditure Plan. Measure K was renewed for 30 years to 2041 in November 2006.

G. San Joaquin- Stanislaus - Merced Transportation Demand Management (*dibs* program)

As a Transportation Control Measure and TDM Program, SJCOG provides a commuter service program under the auspices of *dibs* and serves the counties of San Joaquin, Merced and Stanislaus. Dibs offers a multi-modal trip planning system, vanpool incentives, community and employer outreach, an emergency ride home program and coordinates special events. The goal of the program is to help meet community objectives by reducing congestion and improving air quality by promoting smart travel options such as carpooling, transit, vanpooling, biking and walking. The program has registered 10,590 members with 964,683 alternative miles travelled; a financial savings to commuters of \$0.4 million and a reduction of 295 metric tons of CO2 from the environment. Services for Stanislaus County are provided through a contract with StanCOG and for Merced County, through a contract with MCAG. Funding for all three counties is through the Federal CMAQ Program.

H. Regional Housing Needs Allocation (RHNA)

The state establishes affordable housing targets for each county. In San Joaquin County, SJCOG is responsible for determining the fair share distribution of those affordable units among our member jurisdictions. This responsibility is codified in state law. Per SB 375, the RHNA process is an integral part of developing a Sustainable Community Strategy (SCS) for the San Joaquin County region. The current (2014-2023) RHNA was completed as a coordinated effort with the 2014 Regional Transportation Plan (RTP) and SCS. It was adopted by the SJCOG Board in August 2014 and approved by the California of Housing and Community Development in October 2014. This process occurs every eight years; the next update will be completed in FY 21/22, concurrent with the 2022 RTP update.

I. Lead Agency - Transportation Air Quality Attainment

Per the National Clean Air Act Amendments (1990) and the San Joaquin Valley Air Pollution Control Plan adopted by the San Joaquin Valley Air Pollution Control District, SJCOG serves as joint lead agency for transportation/air quality attainment in San Joaquin County. SJCOG has signed a joint Memorandum of Understanding with SJ Valley Air Pollution Control District, other Metropolitan Planning Organizations and Local Transportation Commissions in San Joaquin Valley to coordinate transportation/air quality planning functions.

J. San Joaquin County Multi-Species Habitat Conservation Plan

SJCOG invested over seven years in the development of the San Joaquin County Multi-Species Conservation Plan. The plan designates a subsidiary of the Council of Governments, SJCOG, Inc., as the implementing agency of plan activities. The plan calls for the mitigation of approximately 100,000 acres of development through the acquisition of conservation easements over a 50-year period.

III. THE REGIONAL PLANNING PROCESS

The San Joaquin Council of Governments is truly a coordinating agency and has developed a review process that is inclusive and comprehensive. While this structure deals primarily with transportation issues, it also is used for housing, air quality, and airport land use planning issues as well. The primary committees are listed below; however, various advisory committees or task forces are also created to deal with specific issues or projects. An example is the RTP/SCS Working Group that assists SJCOG staff with technical and policy questions during development of the plan and implementation activities once the plan is adopted.

A. Technical Advisory Committee (TAC)

This 23-member committee meets monthly to review SJCOG staff working documents and advise the SJCOG Board on regional transportation and planning matters. The membership is composed of local community development and public works department staff, staff from San Joaquin Regional Transit District, Caltrans, San Joaquin Valley Air Pollution Control District, Port of Stockton, and Stockton Metropolitan Airport.

B. Management and Finance Committee (M&FC)

This is a 10-member committee composed of each City Manager/Administrator, the County Administrator, the San Joaquin Regional Transit District General Manager and the Executive Director of the San Joaquin Regional Rail Commission. The committee's function is to advise the SJCOG Board on administrative and financial decisions with a comprehensive look at all local government functions. The Management and Finance Committee also serves as the *Transit Ad Hoc Committee* to assist in developing, vetting and offering recommendations to the SJCOG Board on matters of transit financing and proposed funding policy.

C. Citizens Advisory Committee (CAC)

The CAC is composed of sixteen interested lay people who are residents of San Joaquin County. Eight represent each of the cities in the county and San Joaquin County and are appointed by the SJCOG Board member from that jurisdiction. The remaining eight members are nominated by special interest groups and approved by the SJCOG Board. The committee's primary function is to advise the SJCOG Board in its role as the Local Transportation Authority and to provide community input on project priorities and other matters pertaining to the Measure K program.

D. Social Service Transportation Advisory Committee (SSTAC)

The Social Service Transportation Advisory Committee is composed of citizens and staff from various agencies and each jurisdiction. The committee's purpose is to advise the Board on issues relating to transit and to monitor and promote improvements to public transportation services for people traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e. Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups. The committee, created to meet requirements in state law, includes representatives of the elderly, the poor, the disabled, and social service agencies that serve these and other transit dependent persons. The San Joaquin Council of Governments also holds public hearings and is active in making presentations on its work throughout the County.

E. Interagency Transit Committee (ITC)

This committee is comprised of public transit operators from throughout the county. This committee focuses on transit planning, programming and financial activities of common interest to the operators as well as transit capital project delivery. It is the first committee to formulate proposals concerning regional transit programming and financial matters. The Committee also serves as an information exchange concerning transit operational coordination items.

F. Project Delivery Committee (PDC)

The committee coordinates and implements the delivery of transportation projects utilizing Measure K or Measure K Renewal Funds. The Project Delivery Committee is also responsible for reviewing and making recommendations to the SJCOG Board regarding policy and procedural issues affecting the management of Measure K and Measure K Renewal projects.

G. Habitat Technical Advisory Committee (HTAC)

The committee reviews and makes recommendations to the Habitat Technical Advisory Committee and the SJCOG Board regarding the implementation of the Habitat Plan, including alternative habitat preserve acquisition methods. The HTAC meets on the second Wednesday of every month and the meetings are open to the public.

H. Goods Movement Task Force (GMTF)

The GMTF is comprised of representatives from member agencies, State Department of Transportation, Port of Stockton, California Highway Patrol, California Trucking Association, Railroad Operators, and other private/public stakeholders with interest in Goods Movement. As an advisory committee, it meets on a regular basis specifically on goods movement issues (e.g., STAA Terminal Access, Port Access, safety) and related studies from a regional and interregional focus.

IV. THE OVERALL WORK PROGRAM

The Overall Work Program is a management tool identifying the tasks and products that the Council of Governments will undertake or deliver during fiscal 2020/21. The OWP identifies the funding sources and staff resources necessary to complete the Overall Work Program.

V. FUNDING SOURCES

The San Joaquin Council of Governments' anticipated sources of funding are described below.

A. Federal Funding Sources

Consolidated Planning Grant Funds - This program combines Federal Highway Administration planning funds and Federal Transit Administration planning funds for more efficient administration of those funds. Individually, those two federal funding sources are:

PL Funds - These are dollars made available by the Federal Highway Administration (FHWA) for Metropolitan Planning Organizations. The funds are allocated based on a statewide apportionment and are meant to carry out Federal urban planning requirements and interests. The formula for PL funds is divided into three components: 1) a base allocation, 2) an air quality component based on the proportion of CMAQ funds to total programmatic PL fund sources, and 3) a population component which distributes funds by proportion of total population of each MPO region.

Federal Transit Administration (FTA) Funds – FTA is the federal agency responsible for federal public transit investments. There are generally four sources of FTA funds used in this area:

- Section 5303 is planning funds made available to the Metropolitan Planning Organizations to support transit planning in the urbanized areas.
- Section 5313/5314 Planning and Research Grants are planning funds that the State allocates for special transit planning projects.
- Section 5307 federal funds are made directly available to transit operators for operating expenses including planning.
- Section 5316/5317 are federal funds made available for projects derived from locally developed Coordinated Public Transit-Human Services Transportation Plan.

B. State Funding Sources

Transportation Development Act (TDA) - State Transit Assistance (STA) - SJCOG policy apportions 2% of State Transit Assistance funds for transit planning purposes.

Various State Planning Grants - SJCOG receives grants from the State of California

to conduct specific planning projects.

Freeway Service Patrol - SJCOG receives funding from the State of California to operate the Freeway Service Patrol on specific highways in the county.

Proposition 1B - The State of California passed a \$19.9 Billion transportation infrastructure bond in November 2006. San Joaquin County has received allocations for specific projects including widening State Route 99 and I-5, constructing auxiliary lanes on Interstate 205, extending SR 4 west of I-5 and dredging by the Port of Stockton of the San Joaquin River.

SB-1 - Senate Bill 1, the Road Repair & Accountability Act of 2017, includes a Sustainable Communities Formula Grant Program which allocates \$12.5 million annually to Metropolitan Planning Organizations (MPOs). The grant funds are primarily for projects and plans for reductions in greenhouse gas emissions (GHG) and vehicle miles of travel (VMT) and/or to integrate land-use and transportation planning. Eligible expenditures include development of and implementation activities for the Sustainable Communities Strategy (SCS) element of the Regional Transportation Plan (RTP). Only MPOs have access to these funds, which are allocated by formula to all eligible MPOs.

C. Local Funding Sources

Transportation Development Act - Local Transportation Fund (LTF) - These are funds derived from the Transportation Development Act used by SJCOG to carry out planning in the region and administration of the Transportation Development Act. SJCOG policy is to apportion 3% for planning purposes. Special assessments for specific planning projects are also approved on a year to year basis. TDA Administration is funded 100% by these funds.

Member Jurisdictions - Occasionally SJCOG will undertake a special study for a local jurisdiction. That jurisdiction will either directly pay for the SJCOG study, or provide whatever matching funds are required to pay for the study.

Fees - SJCOG charges fees for certain functions such as the Airport Land Use Commission reviews, Regional Transportation Impact fees, and Habitat Conservation Plan fees. SJCOG also charges fees for special events such as the One Voice® trip.

Local Transportation Authority (Measure K/Renewal) - In November 1990 San Joaquin County voters passed a 20 year ½ cent sales tax to fund specified transportation projects. SJCOG'S administration (salaries and benefits) of that program statutorily cannot exceed 1% of receipts. Project planning and management to coordinate and deliver specific Measure K projects are funded, as well. In November 2006, San Joaquin County voters approved an extension of the Measure K Program. The extension went into effect in April 2011 and continues for 30 years, until March 31, 2041.

Air Pollution Control District grants - The San Joaquin Valley Unified Air Pollution Control District allocates funds raised from a \$19.00 special excise fee on vehicle registrations. These funds go to operate the District as well as pay for special projects

that enhance the District's mission of improving air quality in the Valley.

CalSAFE - The California Service Authority for Freeway Emergencies/Expressways was established by the State Legislature to implement a program to enable motorists in need of aid to obtain assistance. The program is supported by a one dollar per vehicle registration annually to fund motorist aid services. The San Joaquin Council of Governments is a member of the SAFE program for San Joaquin County, which is operated by the Sacramento Area Council of Governments (SACOG). This program funds call boxes and the 511 Traveler Information System in San Joaquin County and provides matching funding Freeway Service Patrol operations in SJC.

VI. SJCOG STAFFING

The Council of Governments staff consists of an Executive Director and 36 professional and support positions. The agency is an equal opportunity, At Will employer. The agency hires consultant services to carry out specified projects and has adopted Disadvantaged Business Enterprise goals consistent with the Code of Federal Regulations, Title 49, part 23.

VII. SAN JOAQUIN COUNTY REGIONAL ISSUES

Overview of Trends: San Joaquin County's population has been steadily increasing for the last 10 years; San Joaquin County was one of the fastest growing counties in the state from 2017 to 2018. At 1.5%, it ranked third for all California counties in year over year percentage increase. More recently, the population growth rate has averaged close to 1.4%; this growth rate is expected to continue in the near term, tapering off beginning in 2025 and dropping to less than 1% in the later years of the forecast (through 2050). However, the expectation is that San Joaquin will remain one of fastest-growing regions within the state's 58 counties. Comparatively, population growth rates for the state and nation are currently closer to 1% and declining. Future population growth in San Joaquin County is supported by several intersecting factors: including proximity to Bay Area economic centers, greater affordability versus neighboring counties, and continued economic diversification and expansion, as well as robust natural increase. San Joaquin County's population will surpass the 1 million mark between 2045 and 2050.

By 2015, San Joaquin County had mostly rebounded from the Great Recession of 2008. While the recession exacerbated certain historical traits of the county, San Joaquin County has shown significant improvements to unemployment, job growth, and economic expansion over the intervening five years through 2020 – reaching and exceeding pre-recession employment levels. Notwithstanding the positive improvements in the county, San Joaquin County faces problems similar to many of California's interior regions: higher unemployment and poverty levels than both state and national averages, rapid urbanization, infrastructure constraints, environmental and quality of life concerns, mobility and congestion challenges for the movement of both people and goods, and the desire to expand economic opportunities while addressing all these challenges. As the 21-22 fiscal year approaches, the county begins the task of recovery from a global pandemic and the associated economic fall-out. SJCOG will continue to monitor and analyze the widespread impact of the pandemic on population, housing, transportation, and economic indicators to inform policy and project delivery

needs. Below are example strategies designed to address these concerns that the San Joaquin Council of Governments will implement in this Overall Work Program:

A. Regional Transportation System

San Joaquin County (SJC) is strategically located in Northern California's dynamic growth corridor and is often defined as the eastern gateway to the Bay Area. The county has become a defacto part of the Bay Area by virtue of its geographic location and the migration of workers and companies from the Bay Area. In fact, in 2013, the Federal Government added San Joaquin County to the San Jose-San Francisco-Oakland Combined Statistical Area reflective of San Joaquin County's prominent role in the larger Bay Area economy. San Joaquin County is prominently positioned to expand its role in the "mega-region" as a result of expansion and diversification of local employment sectors, proximity to Bay Area economic centers, lower cost of living, and higher quality of life.

A highly accessible highway transportation system links SJC to major California destinations. The county is a major Northern California transition point with two primary North-South highways, Interstate 5 and SR 99. They are connected by the Stockton Crosstown Freeway (SR 4) in the center of the county and SR 120 through Manteca in the south. Interstate 5 is the main north-south route for transportation along the west coast from Canada to Mexico. State Route 99 is the main inland route through California connecting major cities in the San Joaquin Valley. I-205 through the city of Tracy connects to I-580 over the Altamont Pass and into the greater San Francisco Bay Area.

The principles of "Sustainable Communities" and "Smart Growth" will be integral to the implementation of the OWP. SJCOG, through the inclusion of a Sustainable Community Strategy in its Regional Transportation Plan effort, will foster coordinated planning with neighboring cities, counties and other governmental entities to agree upon regional strategies and policies for dealing with the regional impacts of growth on transportation, housing, and the environment. Supporting this effort will also involve the implementation of the region's Smart Growth Incentive Program (SGIP) which is part of the Measure K Renewal program and SJCOG's compliance with SB 375, as well as new work elements supporting regional housing programs and transportation equity activities

The transportation planning work elements that deal with transportation infrastructure issues include:

- Regional Transportation Plan
- Regional Transportation Plan Studies
- Transit Planning and Coordination Studies
- Regional Transportation Improvement Programs
- Regional Congestion Management Program
- Measure K Transportation Sales Tax Program
- Regional Transportation Impact Fee (RTIF)

- STEP (Sustainable Transportation Equity Program) Grant

While each of these work elements deals with different components of transportation infrastructure, each attempts to focus investments into cost-effective and environmentally sound transportation improvements.

B. Air Quality

San Joaquin County sits at the northern end of the San Joaquin Valley air basin. This air basin has geographical and meteorological conditions that make air quality an issue of major concern. San Joaquin County, excluding the Stockton urbanized area, is in attainment for carbon monoxide. The Stockton urbanized area has been designated by the Environmental Protection Agency as a maintenance area since 1998. San Joaquin County is included in the San Joaquin Valley non-attainment area for ozone, which is classified extreme for the 8-hour Ozone standard. The air basin has been classified non-attainment for the PM_{2.5} standard and maintenance for PM₁₀. Work Elements addressing this concern in this year's work program are the Regional Transportation Plan and Transportation Air Quality and Modeling.

On September 27, 2006, Governor Schwarzenegger signed AB 32, the Global Warming Solutions Act. The act caps California's Greenhouse Gas (GHG) emissions at 1990 levels by 2020. This legislation represents the first enforceable state-wide program in the U.S. that includes penalties for non-compliance to cap all GHG emissions from major industries. This law requires the State Air Resources Board to establish a program for statewide greenhouse gas emissions reporting and to monitor and enforce compliance with this program. In 2008 the Legislature also passed SB 375, which is a companion bill to AB 32. SB 375 focuses on potential Greenhouse Gas reductions through land use and transportation actions. The provisions of SB 375 have been a significant component of SJCOG's planning and policy development. However, it is important to note that sustainability goals are not new to SJCOG's mission which has always included implementation of projects supporting sustainability and preserving environmental quality.

In 2013, The San Joaquin Council of Governments conducted a comprehensive travel model update to improve the effectiveness of modeling data for transportation and air quality analysis. This travel model was the first of its kind for SJCOG, as it includes the three counties of San Joaquin, Stanislaus, and Merced to evaluate the impacts of growth on the regional transportation facilities and air quality. The results of this analysis empower policy makers to make transportation investments that produce the greatest impact to improve air quality. The three-county model was used for the first time in developing the individual Regional Transportation Plans of each region in 2014.

In Fiscal Year 2015/16, the three-county model was further updated to include new calibrations and technical refinement. It was used by all three counties in assessing the impacts of various air quality strategies and in assessing the regional transportation impacts of land use decisions in the Congestion Management System and the performance measurement and management. In Fiscal Year 2017/18, the model was used by all three counties for their respective 2018 RTP/SCS updates. With another minor update, this model will be deployed for the 2022 long-range plan update as well.

SJCOG is committed to expand and strengthen the conformity process and the coordination on Valley-wide Transportation Modeling. Furthermore, as more direction comes forward, SJCOG will incorporate the needed methodologies to meet the intent of AB 32 and SB 375 in order to lower GHG emissions.

C. Single Occupancy Vehicle (SOV) Usage

A key focus for SJCOG is providing the public with more mobility options in order to reduce the incidence of SOVs. The use of Transportation Demand Management (TDM) strategies such as improving the access to and level of public transit and the use of van and car pools are essential to reduce the incidence of SOV usage. TDM strategies are necessary in order to prevent and reduce congestion on the regional transportation system. These strategies have a direct impact on improving air quality.

Public Transportation

Bus Systems

Transit systems relevant to this work plan are the local, intercity, interregional, and dial-a-ride bus services, currently operating in San Joaquin County. Transit also includes needed services such as demand response for both those who are in need of transit for medical purposes and those in rural areas (general public dial-a-ride). All cities and unincorporated areas in San Joaquin County are served by a public transit system. These systems range from an extensive bus fleet system operated by the San Joaquin Regional Transit District (RTD), to the single bus operated by the City of Ripon.

There are several main types of public transit services currently operated by RTD and the cities in San Joaquin County: 1) general public fixed-route; 2) general public dial-a-ride; 3) general public route-deviation; and 4) and paratransit dial-a-ride.

The 2010 census streamlined public transit planning and programming in San Joaquin County. The City of Galt, which is in Sacramento County, is no longer associated with the Lodi Urbanized Area. The City of Ripon is within the Manteca Urbanized area rather than the Modesto Urbanized Area, which is in Stanislaus County.

Passenger Rail Transportation Systems

San Joaquin County sits as the rail linchpin for the State of California. All of the major existing freight rail lines connecting the San Francisco Bay Area and Los Angeles run through San Joaquin County. All the major rail lines, with the exception of the Coast route, connecting southern and northern California, run through San Joaquin County.

The Altamont Corridor Express (ACE) is in its third decade of service operating between downtown Stockton and Diridon Station in downtown San Jose. ACE continues to focus on improvements to individual stations, trackage and signal improvements to upgrade service and passenger targeted services such as Wi-Fi access, special event trains and on-board educational programs.

The San Joaquin Regional Rail Commission (SJRRRC) is responsible for the above-mentioned ACE service and also acts as the San Joaquin Joint Powers Authority to operate the Amtrak San Joaquins service. It is currently implementing ACE forward. ACE forward is a phased improvement plan to increase service reliability and frequency, enhance passenger facilities, reduce travel times along the existing ACE service corridor from San Jose to Stockton and extend ACE service to Manteca, Modesto, Ceres, Turlock and Merced as well as Sacramento (to the north). An environmental document, made available for public review in FY 17/18, provides the foundation for SJRRRC's near-term and longer-term vision of intercity and commuter passenger rail services.

In 2017, AB 758, authored by Assembly member Susan Eggman, created the Tri-Valley-San Joaquin Valley Regional Rail Authority. The Authority is tasked with managing the planning and construction of rail connectivity between the Bay Area Rapid Transit (BART) system and ACE. It has examined the feasibility of a diesel multiple unit (DMU)/electrical multiple unit (EMU) rail systems and proposed alignments the Dublin/Pleasanton BART station and the San Joaquin County communities of Tracy, Lathrop, and Stockton. In January 2018, the newly established Authority held its first meeting and shortly thereafter embarked on a feasibility report. In October 2019, the Authority approved the feasibility report. An Environmental Impact Report was circulated in 2020 for public review.

Van Pools, Rideshare, Biking, and Walking

Other TDM strategies involve organizing residents and businesses / employees to develop and connect people in commuter van pools and automobile ridesharing. Other means to get from an origin to a destination involve walking and riding bikes. In addition, SJCOG Board approved in FY 17/18 approximately \$20 million of bicycle/pedestrian/safe routes to school projects and smart growth projects for the San Joaquin region. This was funded from the Measure K half-cent sales tax program which advanced a few years of Measure K funds. This enabled the rolling out of the largest program of TDM projects in a single call for projects and a larger-scale infusion of benefits (from these investments) to the region. This strategy to funding has continued since that time and will be part of the FY 21-22 work program as well.

Congestion Management

The Regional Congestion Management Plan (RCMP) for San Joaquin County reflects a renewed vision of the future of travel in our region. The RCMP is designed to combat congestion and its impacts on economic development by employing strategies that focus on a broad set of supply-side and demand-side strategies that embrace the latest thinking about reducing SOV trips, including more pro-active land use and pricing policies, coordinated investment in alternative modes of transportation, and new incentives for getting people out of their cars.

D. Transportation Authorization

SJCOG has been very active in statewide implementation of the MAP-21 legislation and its successor, Fixing America's Surface Transportation Act or "FAST Act". SJCOG

continues with implementation of the Final Rules by sponsoring training sessions, workshops and forums for member agencies to ensure the region is in full compliance and takes full advantage of the transportation authorization.

E. Goods Movement

The movement of goods is essential to the economic good of the region. San Joaquin County is geographically considered an interregional goods movement hinge points for California due to the relationship with the San Francisco Bay Area and the Greater Sacramento Area. The Port of Stockton, located in city of Stockton, is comprised of warehouse storage and handling facilities. It is centrally located and handles national and international product and cargo traveling to the Port via highways, railways, and waterways. Also notable, San Joaquin County is home to two Class I railroads, Union Pacific (UP) and Burlington Northern Santa Fe (BNSF), the Port of Stockton and the Stockton Metropolitan Airport, which is one of the most active airports in the Central Valley supporting air cargo traffic.

San Joaquin County is the farthest north region in the Central Valley Trade Corridor which has the greatest amount of truck traffic volume in the state. The region is a major producer of grapes, milk, cherries, tomatoes, almonds, and walnuts. Goods movement industries include the following: Ranching, Food Processing, Fruit and Vegetable Farming (comprised of companies such as B&B Ranch, Pacific Coast Producers, Morada Produce Company). Most recently the county has become a regional hub for warehousing and logistics companies – this sector has produced 50% of the county job growth in the last five years. As retail trade increasingly moves towards e-commerce, goods movement in and out of the County will continue be an important factor in the growth of regional travel demand.

San Joaquin Council of Governments will continue to staff and host the Goods Movement Task Force (GMTF) which has become an important advisory committee to SJCOG and its partners. The committee is very involved in the Intermodal Goods Movement Management System.

VIII. FEDERAL PLANNING EMPHASIS AREAS

Planning emphasis areas (PEAs) are policy, procedural, and technical topics that should be considered by Federal planning fund recipients when preparing work programs for metropolitan and statewide planning, and research assistance programs.

For the FY 21/22 Overall Work Program, the Federal Transit Administration (FTA) and Federal Highway Administration (FHWA) Region IX stated there are no Federal Planning Emphasis Areas (PEAs) or California PEAs; these can be amended should new factors be developed. However, FHWA and FTA have determined OWPs have the option to continue to reference the Federal and state (California) Planning Emphasis areas. P E A s o f emphasis for California's transportation planning and air quality program are:

Core Planning Functions
Performance Management
State of Good Repair

1. **Core Planning Functions**

SJCOG's Overall Work Programs (OWP) identifies the Core Planning Functions and what work will be done during the program year to advance those functions. The Core Functions can be found in 23 CFR 450, Subpart C, and typically include:

- Overall Work Program
- Public Participation and Education
- Regional Transportation Plan
- Federal Transportation Improvement Program
- Congestion Management Process (required for TMAs)
- Annual Listing of Projects

Transportation legislation provided metropolitan transportation planning program funding for the integration of transportation planning processes in the MPA (i.e. rail, airports, seaports, intermodal facilities, public highways and transit, bicycle and pedestrian, etc.) into a unified metropolitan transportation planning process, culminating in the preparation of a multimodal transportation plan for the MPA. The FHWA and FTA request that all Metropolitan Planning Organizations (MPOs) review the Overall Work Plan (OWP) development process to ensure all activities and products mandated by the metropolitan transportation planning regulations in 23 CFR 450 are a priority for FHWA and FTA combined planning grant funding available to the region. The MPO OWP work elements and subsequent work tasks must be developed in sufficient detail (i.e. activity description, products, schedule, cost, etc.) to clearly explain the purpose and results of the work to be accomplished, including how they support the Federal transportation planning process (see 23 CFR 420.111 for documentation requirements for FHWA Planning funds).

SJCOG's OWP has been developed to address the core planning functions and provides the necessary work element and work task details to clearly explain both the purpose and results of the work to be accomplished. In addition to the explanation identified in each work element narrative of how these work elements and work task support the Federal transportation planning process, SJCOG's OWP includes a specific section highlighting how the OWP addresses the planning factors.

A few examples of SJCOG's Core Planning Functions include:

- Development and updating of the Overall Work Program.
- Public participation and education.
- Updating and implementation of the Regional Transportation Plan/Sustainable Communities Strategy.
- Federal Annual Listing of Projects.
- Amendments of the Federal Transportation Improvement Program
- Air Quality Conformity analysis.
- Award, programming, and monitoring of federal, state and regional transportation funds.
- Data and technical planning assistance for local jurisdictions and agencies
- Collaboration with transportation partners on planning studies and corridor planning.
- Regional transportation modeling, analysis, and monitoring.

- Coordination with San Joaquin Valley COGs (RTPAs) on regional planning.

2. **Performance Management**

Caltrans and most of California's MPOs have developed performance measures that are included in their Regional Transportation Plans (RTPs) and Federal Transportation Improvement Programs (FTIPs). The objective of the performance- and outcome-based program is for States and MPOs to invest resources in projects that collectively will make progress toward the achievement of the national goals. MAP-21 requires the DOT, in consultation with States, metropolitan planning organizations (MPOs), and other stakeholders, to establish performance measures in the areas listed below:

- **Safety** - To achieve a significant reduction in traffic fatalities and serious injuries on all public roads.
- **Infrastructure Condition** - To maintain the highway infrastructure asset system in a state of good repair.
- **Congestion Reduction** - To achieve a significant reduction in congestion on the National Highway System.
- **System Reliability** - To improve the efficiency of the surface transportation system.
- **Freight Movement and Economic Vitality** - To improve the national freight network, strengthen the ability of rural communities to access national and international trade markets, and support regional economic development.
- **Environmental Sustainability** - To enhance the performance of the transportation system while protecting and enhancing the natural environment.
- **Reduced Project Delivery Delays** - To reduce project costs, promote jobs and the economy, and expedite the movement of people and goods by accelerating project completion through eliminating delays in the project development and delivery process, including reducing regulatory burdens and improving agencies' work practices.

SJCOG's RTP has placed an emphasis on quantitative objectives and performance measures, which will help with the new - federal legislation. The Federal Congestion Management Process component of the RTP also relates to performance management.

The CMP performance measures are used as the foundation to assess the operational condition of the regional roadway system and assist in determining the value of the project in improving the operational condition. This relationship assists in the overall prioritization of projects in the RTP which is also reflected in the CMP Capital Improvement Program and the FTIP. Examples include:

- 1) Use of all reasonable TDM strategies to mitigate trip impacts, use of applicable regional planning studies to, for example, design identified roadways to expressway and STAA standards.
- 2) Results of assessment and monitoring lead to targeted OWP activities and furthers targeted regional planning efforts.

In addition to the RTP, SJCOG will also continue to incorporate performance based planning in its planning processes.

3. State of Good Repair

MPO's are required to evaluate their transportation system to assess the capital investment needed to maintain a State of Good Repair for the region's transportation facilities and equipment. MPO's shall coordinate with the transit providers in their region to incorporate the Transit Asset Management Plans (TAM's) prepared by the transit providers into the Region Transportation Plan (RTP). Analysis of State of Good Repair needs and investments shall be part of any RTP update, and must be included in the Overall Work Program task for developing the Regional Transportation Plan. MPO's are expected to regularly coordinate with transit operators to evaluate current information on the state of transit assets; to understand the transit operators transit asset management plans; and to ensure that the transit operators are continually providing transit asset information to support the MPO planning process.

Through the transit planning and coordination activities identified in SJCOG's OWP, SJCOG continues to lead transit planning efforts that address transit asset management, preventive maintenance and financing strategies for system repair and expansion. These activities are specifically coordinated through SJCOG's Interagency Transit Committee.

IX. PLANNING FACTORS

Title 23 of the United States Code describes Federal Planning Factors issued by Congress to emphasize factors from a national perspective. Ten planning factors identified in the FAST Act are found in the Code of Federal Regulations (23 CFR 450).

The ten planning factors are:

1. Support the economic vitality of the metropolitan planning area, especially by enabling global competitiveness, productivity, and efficiency;
2. Increase the safety of the transportation system for motorized and non-motorized users;
3. Increase the security of the transportation system for motorized and non-motorized users;
4. Increase the accessibility and mobility of people and for freight;
5. Protect and enhance the environment, promote energy conservation, improve the quality of life, and promote consistency between transportation improvement and State and local planned growth and economic development patterns;
6. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight;
7. Promote efficient system management and operation; and
8. Emphasize the preservation of the existing transportation system.
9. Improve the resiliency and reliability of the transportation system and reduce or mitigate storage water impacts of surface transportation.
10. Enhance travel and tourism.

1. Support economic vitality of the metropolitan planning area. The work elements and tasks included in the OWP for San Joaquin County support and enhance the

economic health of the entire region. Activities focused within San Joaquin County target improvements to high priority corridors for transit investments, congestion relief and goods movement to maintain the economic competitiveness of the region.

2. Increase Safety. Since the passage of the Intermodal Surface Transportation Act for the 21st century in 1991, states and MPOs have been encouraged to incorporate safety and security measures in their plans, programs, and ongoing planning activities. The OWP supports the inclusion of projects and programs that enhance public safety by maintaining specific safety-related funding sources at the local, state, and federal levels. SJCOG's RTP includes goals, objectives and performance measures concerning safety. San Joaquin County's local sales tax, Measure K, identifies funding for grade separation projects, bike and pedestrian projects, and local street repair – all of which enhance various aspects of public safety on the regional transportation system. In the same way, the State's SHOPP program and the federal safety program provides funding specific to increasing safety on the transportation system, in addition to more general State and federal revenue sources that are used for motorized and non-motorized safety projects.
3. Increase Security. As noted under the safety emphasis area, States and MPOs have been encouraged to incorporate safety and security measures in their plans, programs, and ongoing planning activities since the early 1990s. The OWP supports the security of the transportation system by providing assistance to transit agencies implementing additional security requirements for FTA grant recipients brought on by SAFETEA-LU. Such projects are included in the FTIP and in the provision of ITS elements and security strategies for priority projects.
4. Increase mobility and accessibility. Increasing mobility and accessibility across the regional transportation system are the hallmarks of transportation planning and project development. Many of the transportation-related activities in the OWP have a common underlying theme of increasing the mobility and accessibility of the transportation system. As defined in SJCOG's RTP, mobility is defined as meeting the public need for improved access and for safe, comfortable, convenient, and economical movement of goods and people. Accessibility focuses on minimizing the time and cost associated with accessing transportation options. While traditional transportation projects address access, travel time, and cost, SJCOG staff is also pursuing alternatives such as ramp metering and high occupancy vehicle/high occupancy toll lanes.
5. Improve the quality of life: Environmental protection, energy conservation, growth, and economic development all contribute to the overall quality of life for residents in San Joaquin County. The OWP devotes a significant amount of resources to this end. In addition to the mandated work addressing local and Valley-wide air quality issues, SJCOG continues its work on implementation of enhanced modeling activities (economic, forecasting, and travel demand) in support of the RTP/SCS development and policy implementation. Both of these efforts raise awareness throughout the community about the environmental impacts of growth, travel, and development.

6. Enhance the integration and connectivity of the transportation system: The OWP continues to expand the opportunities for the San Joaquin region to coordinate across and beyond regional boundaries. The Altamont Commuter Express and Regional Transit District provide increasing connectivity between travel modes, and SJCOG staff will continue its participation and collaboration on transit planning efforts and capital project delivery. An example of this collaboration is the newly launched regional transit planning and ticketing app known as EasyHub. In addition, the OWP supports monitoring efforts on the San Joaquin Valley Joint Powers Authority and the Tri-Valley-San Joaquin Valley Regional Rail Authority.
7. Promote efficient system management and operation: A regionally coordinated, strategic approach to managing and operating transportation systems can yield dramatic improvements in system productivity and service cost effectiveness. This applies both to transit services as well as traditional transportation projects. Efficient system management and operation are highlighted in the OWP through regional planning and programming efforts and project development activities. This includes integration of the federal congestion management process into the RTP/SCS and establishment of transportation demand measures as part of the CMP Deficiency Plan.
8. Emphasize the preservation of the existing transportation system: System maintenance and preservation are critical to the long-term viability of transportation systems. Under the fiscal reality of tightening transportation budgets at all levels of government, resources are needed both for system expansion and system preservation. The OWP provides support and funding mechanisms to direct necessary resources towards roadway rehabilitation and repair. Examples include the region's Measure K program funding for local street repair, the dedication of RTP/SCS investments to maintenance and operation of the system, and this region's primary focus on local road repair and rehabilitation for various state and federal funding opportunities.
9. Improve resilience and the reliability of the transportation system and reduce or mitigate stormwater impacts of surface transportation: This Planning Factor correlates or overlaps with factors that emphasize the need for system maintenance. Several work elements within the OWP will advance the reliability of the transportation system through planning research and project development to understand corridors and project needs, thereby, making fully informed decisions on investments in project improvements. Sound transportation planning, with inclusive and comprehensive outreach, are OWP work areas that facilitate the resilience and reliability in the region's transportation infrastructure. Investment decisions that focus on innovative construction materials and intermodal connectivity (with other transportation modes or Intelligent Transportation System networks), are planning strategies the OWP will examine to address this Planning Factor. Secondly, SJCOG understands this factor is to encourage MPOs to plan with state agencies involved in natural disasters. This Planning Factor also focuses on minimizing and managing impacts to the environment through practices that assess adverse storm water impacts created by construction of transportation projects. The costs—both financial and environmental—from storm water runoff are real and can be significant. OWP

work elements that discuss intergovernmental coordination, planning studies, feasibility studies, environmental planning, and project development will incorporate storm water impacts and issues.

10. Enhance travel and tourism: Travel and tourism are aspects that overlap into the Planning Factor of economic vitality. SJCOG understands this factors encourages MPOs to foster relationships with the tourism industry and to assess how regional planning plans a role in tourism. OWP work elements that examine sustainability, quality of life, goods movement, and smart growth will include elaborations on travel/tourism impacts as part of the planning analysis and study.

2020/21 Work Elements by MAP-21/ FAST Act Planning Factors

FY 2021/22 Work Elements	MAP-21/FAST Act Planning Factors									
	1	2	3	4	5	6	7	8	9	10
601.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
601.011	✓	✓	✓	✓	✓	✓	✓	✓	✓	
601.014	✓	✓	✓	✓	✓	✓	✓	✓	✓	
601.015	✓	✓	✓	✓	✓	✓	✓	✓	✓	
601.016	✓	✓	✓	✓	✓	✓	✓	✓	✓	
601.017	✓	✓	✓	✓	✓	✓	✓	✓	✓	
601.02	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
602.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	
603.01	✓	✓	✓	✓	✓		✓	✓	✓	
603.015	✓	✓	✓	✓	✓		✓	✓	✓	
603.02	✓	✓	✓	✓	✓	✓	✓	✓	✓	
603.03		✓			✓		✓		✓	
603.04	✓	✓	✓	✓		✓			✓	✓
701.01			✓	✓	✓	✓	✓	✓	✓	
801.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
801.012	✓	✓	✓		✓	✓	✓	✓	✓	
801.02					✓		✓			✓
801.03	✓	✓		✓		✓			✓	
801.04	✓	✓		✓	✓		✓	✓	✓	
801.05			✓	✓	✓	✓	✓	✓	✓	✓
801.06	✓	✓	✓		✓	✓	✓	✓	✓	✓
801.09					✓				✓	
901.01	✓	✓	✓	✓		✓	✓	✓	✓	✓
901.02	✓				✓				✓	
901.03	✓	✓		✓	✓	✓			✓	✓
1001.01										
1001.02						✓		✓	✓	
1001.03	✓			✓	✓	✓			✓	✓
1101.01	✓	✓		✓	✓	✓	✓	✓	✓	
1201.01		✓		✓			✓		✓	✓
1201.03	✓	✓	✓	✓	✓	✓	✓	✓	✓	
1301.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	
1350.01	✓	✓		✓	✓	✓	✓	✓		
1375.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

San Joaquin Council of Governments
FISCAL YEAR 2021/2022
WORK ELEMENTS AND TASKS

601.01 REGIONAL TRANSPORTATION PLAN

A. Previous Work: The current RTP was adopted in June 2018 – it represented a continuation of the work begun with the first RTP (in 2014) to include a Sustainable Communities Strategy (SCS) element as required by SB 375, refreshed with updated assumptions, forecasts, and new planning initiatives. New elements included an enhanced environmental justice analysis and a health metrics pilot report. The adoption included an accompanying programmatic EIR and use of MAP-21/FAST Act Planning and Programming provisions. Where the 2018 plan continued the significant updates to the RTP process from 2014, its implementation in the intervening two years represents yet another step forward for long-range planning in the region. Expansion in the scope of this work element has to included significant staff work and related consulting assistance to implement the SCS. This work has focused on evaluation of new outreach methods, technical analysis tools, new federal planning rules, continued incorporation of the 2016 update to the RTP guidelines, and meeting commitments made in the 2018 plan. Many of these activities have been funded through a combination of SJCOG’s formula-based SB1 planning funds and competitive SB1 grants. Major innovation topics completed in pervious planning cycles or currently under study are:

- Barriers to SCS Implementation (Complete FY 19/20)
- Resiliency of the Transportation System (Phase 1 Complete FY 19/20). Phase 2 includes guides and resources for local agencies to incorporate resiliency and climate adaptation into their own plans and programs (Begun in FY 19/20, complete in FY 20/21)
- Technology and Innovation (Begun FY 19/20, Complete FY 20/21)
- Gentrification and Displacement (Begun FY 19/20, complete FY 20/21)
- Measuring Health Benefits (Complete FY 19/20)
- Economic Modeling to Aid Policy Evaluation (Complete FY 19/20)
- Envision 2050 – A New Approach to Scenario Planning (Begun FY 19/20, Complete FY 21/22)

Major work in the coming fiscal year will include a fresh approach to building alternative future SCS scenarios to be more driven by policy and strategy differences and recognition of the inherent uncertainties in forecasting future conditions. These topics have been presented to the SJCOG Board in the form of policy briefings.

Simultaneous to RTP Implementation, there is continuous monitoring of planning activities consistent with advancing RTP goals, objectives, and performance. Other activities include monitoring and updating project cost estimates and project schedules to ensure compliance with RTP financial planning and air quality conformity.

B. Purpose: The Regional Transportation Plan (RTP) is the comprehensive transportation planning document guiding all public policy decisions for facility and service provisions in San Joaquin County. This document is updated every four years to review regional priorities, and to integrate new laws, regulations and

guidelines into the program. Each update includes a comprehensive review of revenue estimates covering the life of the Plan as the basis for the transportation investment fiscal constraint analysis. This fiscal year will see the development of the next RTP.

C. Tasks:

1. As needed, examine projects to ensure consistency with RTP policies, strategies, & project information –monthly through June 2022.
2. Continue to follow through on public outreach commitments in accordance with the FAST Act, including traditionally under-represented under-served populations such as elderly, disabled, low-income, and minority (i.e. Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders –on-going through June 2022.
3. Continue to implement the RTP/SCS Public Participation Plan (PPP) and update as necessary for the 2022 plan outreach efforts—on-going through June 2022.
4. Regularly update SJCOG website on planning activities with regional, local and state agencies, the general public, and other stakeholders. Such activities include public input on the regional transportation planning process, related strategies to identify regional transportation infrastructure needs, and website updates for the 2022 plan – on-going through June 2022.
5. Ensure compliance to any federal guidance related to the FAST Act and to the RTP Guidelines adopted by the California Transportation Commission in January 2017—as needed through June 2022.
6. Coordinate RTP/SCS development efforts with the update of the Federal Transportation Improvement Program (FTIP) and ensure information, data, project detail, and funding resources are consistent and accurate.
7. Continue to monitor best practices in performance measurement for incorporation in the 2022 RTP/SCS development and implement new models or tools as appropriate.
8. Continue staff training and/or monitor consultant work products as needed
9. Continue to monitor RTP/SCS performance indicators against empirical data through the *Regional Progress Report*.
10. Continue discussions/interactions/meetings with fellow RTPA partners, and the SJCOG Board & committees on RTP policies and emerging planning issues.
11. Evaluate the effectiveness of the RTP in meeting federal requirements for federal transportation Performance Measures (PM); specifically PM 1 (highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program).

D. Products & Schedule:

1. FAST Act Compliant Regional Transportation Plan Amendments – as needed through June 2022.
2. Regular meetings of the RTP/SCS Working Group, including agenda

- items, and correspondence. – bimonthly through June 2022.
3. Attendance of meetings at state, federal, or regional level to keep abreast of RTP/SCS development of fellow MPOs/RTPAs – on-going through June 2022.
 4. Funding and implementation strategies for near-term significant projects identified in 2018 RTP/SCS that provide regional benefit and reflect the Congestion Management Process (CMP) –As Needed Through 2022.
 5. Attendance at any workshops or staff training to support RTP implementation/development—As needed through June 2022.
 6. Meetings and correspondence with fellow RTPA partners (and local partners) on RTP policies/practices and provide presentations or any responses to data and information requests—Monthly through June 2022.
 7. Development and Implementation of modeling tools as part of the 2022 RTP/SCS activities
 8. As part of Type 4 and Type 5 RTP amendments, report on how project adjustments and project implementation is helping SJCOG meet established goals for PM 1, PM 2, and PM 3.

2022 RTP/SCS Development:

9. Deliver TAZ allocation based on preferred land use scenario to modeling team for scenario modeling – July 2021
10. Complete draft scenario modeling – September 2021
11. Complete draft plan public outreach – April 2022
12. EIR:
 - Release draft EIR for public review – March 2022
 - Adopt final EIR – June 2022
13. Complete Environmental Justice Analysis – October 2021
14. Release draft RTP/SCS for public review – February 2022
15. Adopt final RTP/SCS – June 2022

E. Funding Sources:

Federal Highway Administration PL	\$ 821,022.00 – Toll Credits 94,171.22
FTA (5303)	\$ 228,781.00 – Toll Credits 26,241.18
Local Transportation Authority MK-COG	\$ 0.00
Local Transportation Authority MK-PM	\$ 0.00
Local Planning Funds LTF- COG	\$ 0.00

F. Responsible Agency: SJCOG

<u>SJCOG</u>	<u>Consultants</u>
\$ 849,803.00	\$ 200,000.00

G. Staff Required: (person-months)

SJCOG
8.0

601.011 SGC AHSC (Strategic Growth Council Affordable Housing and Sustainable Communities) Management.

A. Previous Work: SJCOG staff has provided technical assistance to applicants to the Affordable Housing/Sustainable Communities grant program since FY 15/16. Funding for the technical assistance program has been funded through a grant from the Strategic Growth Council.

B. Purpose: To coordinate the technical assistance provided by San Joaquin Valley MPOs for the 21/22 Strategic Growth Council Affordable Housing Applicant Technical Assistance Grant

C. Tasks:

1. Administrative Coordination and Reporting
2. SGC AHSC 2020-21 (Round 6) Full Application Support
3. Capacity Building for Future AHSC Applications

D. Products & Schedule:

1. Administration and Grant Coordination – through June 2022
2. Communications and documented correspondence for SGC AHSC 2021/22
3. Application Support as required through appeal process – July/August 2021
4. Workshops in preparation for next cycle of grants —August-November 2021

E. Funding Sources (000):

Strategic Growth Council AHSC FY 20/21	\$ 20,000.00
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F. Responsible Agency: \$ (000)

SJCOG
\$ 20,000.00

G. Staff Required: (person months)

SJCOG
1

601.014 SB1 MPO Sustainable Communities Formula Grants Awarded in FY19/20 (Gentrification & Displacement Risk Assessment of San Joaquin County, San Joaquin Transportation Innovation Planning Study)

A. Previous Work:

1. Gentrification & Displacement Risk Assessment for San Joaquin County: During FY 20/21, staff initiated project activities, including convening a working group and gathering data and input to inform draft deliverables. Greater detail for completed and on-going tasks are noted as such in Section C, while completed work products/deliverables are noted below:

Completed work products from previous fiscal years are:

- Project kick-off meeting / meeting notes: July 2019
 - Consultant Selection RFP & Contract: January – June 2020
 - Working Group Meeting #1 – October 2020
 - Working Group Meeting #2 – November 2020
 - Working Group Meeting #3 – January 2021
 - Current conditions report – June 2021
2. San Joaquin Transportation Innovation Planning Study: During FY 20/21, staff initiated project tasks, including convening a working group and gathering data and input to inform draft deliverables.

Completed work products from previous fiscal years are:

- Project kick-off meeting / meeting notes: July 2019
- Consultant Selection RFP & Contract: January – June 2020
- Conducted stakeholder survey – July 2020
- Working Group Meeting #1 – July 2020
- Working Group Meeting #2 – November 2020
- Draft Policy Framework – December 2020
- Final Policy Framework – March – June 2021
- Review and memorandum outlining existing/planned local and regional innovation projects and initiatives – June 2021

B. Purpose: To administer the FY 19/20 SB1 Sustainable Communities Formula Grant and build a sustainable community and transportation system through two independent planning studies

1. **Gentrification & Displacement Risk Assessment of San Joaquin County:**

SJCOG will lead a regional assessment to understand the risk of gentrification and displacement in San Joaquin County. This study will be a crucial tool for SJCOG to implement best practices in Health & Health Equity as outlined in Appendix K of the 2017 RTP Guidelines. The risk assessment will address the following overall objectives:

- To understand the current state of displacement and gentrification occurring across San Joaquin County,
- Develop a methodological toolkit for SJCOG and local partners to evaluate the impacts of transportation investment on neighborhood change, and

- Draft policies to mitigate displacement and gentrification impacts from transportation and other types of public investment.

2. **San Joaquin County Transportation Innovation Planning Study:** SJCOG will perform a study to identify and determine transportation innovations for implementation and adoption in San Joaquin County. Specifically, the study will address the following objectives:

- Review of existing data and technology initiatives led by SJCOG and other public and private entities in the region
- A policy framework to inform SJCOG’s regional role in advancing the adoption of transportation innovations in the region
- An evaluation of various technology innovations using criteria and metrics developed by a working group
- The recommendation of one technology innovation for further planning and piloting through a sub-grant set-aside for this purpose.

The information and data developed from these planning activities will be used to enhance the methods used in evaluating social equity impacts of the RTP/SCS, as well as build upon local and regional efforts to understand and address displacement and gentrification in San Joaquin County. SJCOG intends to work in coordination with its local and regional partners to implement the planning activities included in this project scope.

C. Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management for the following studies (tasks are for the full performance period of the grant – some tasks were completed in previous FYs and are noted as such below. All tasks for these two studies will be completed this fiscal year.

1. Gentrification & Displacement Risk Assessment of San Joaquin County

1. Project Initiation

Task 1.1: Project Kick-Off (Complete)

- SJCOG will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- **Responsible Party: SJCOG**

Task 1.2: Staff Coordination (On-Going / Carried Over From Previous FYs)

- Monthly project team meetings with consultant to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to the project team meetings.
- **Responsible Party: SJCOG**

Task 1.3: Procure Consultant Services (Complete)

- Select a consultant(s) using the proper procurement procedures.
- **Responsible Party: SJCOG**

2. Convene San Joaquin County Gentrification and Displacement Working Group (On-Going / Task Carried Over From Previous FYs)

Task 2.1: Identify and assess the current conditions impacting gentrification and displacement in San Joaquin County (On-Going / Task Carried Over From Previous FYs)

- Convene working group of local and regional housing and transportation planning practitioners to gather input on the design of the study and its research objectives
- Collect points of contact for facilitating focus groups or key informant interviews to assess on-the-ground experiences linked to housing insecurity and transportation access
- Conduct a spatial analysis of gentrification and displacement risk in San Joaquin County
- **Responsible Party: Consultant**

Task 2.2: Develop methodological toolkit for SJCOG and/or local and regional partners to evaluate the potential impacts to neighborhood change that are linked with transportation investment

- Convene working group to gather input on developing methodological tools for evaluating the impact of transportation investment on neighborhood change
- Using the 2018 RTP as a case study, provide an analysis of gentrification and displacement risk
- Using the results from the case study, assist SJCOG staff through training in incorporating the toolkit into its 2022 RTP/SCS
- **Responsible Party: Consultant**

Task 2.3: Identify policies that may help to mitigate displacement and gentrification impacts from transportation, and/or any type of public investment

- Convene working group to assess existing policies across the region and/or to identify policies specifically shaping transportation investment that help to mitigate displacement and gentrification (one such framework can be found in the State's Transformative Climate Communities Program framework for avoiding displacement).
- **Responsible Party: Consultant**

3. Gentrification and Displacement Risk Assessment of San Joaquin County Report (On-Going / Carried Over From Previous FY)

Task 3.1: Draft Report

- Based on input gathered from the working group, focus groups, and/or key informant interviews, a draft report will be prepared to address research objectives.
- The draft study will be reviewed by staff and working group, as well as presented to SJCOG policy board for comment and feedback.
- **Responsible Party: Consultant**

Task 3.2: Final Report

- Complete the final report addressing comments and feedback received from staff, working group, and SJCOG policy board.
- **Responsible Party: Consultant**

Task 3.3: San Joaquin County Gentrification and Displacement Symposium

- Organize a symposium to deliver key findings from the Final Report
- Invite local and regional partners to present or speak on the topic
- Provide time for attendees to discuss potential next steps
- **Responsible Party: Consultant / SJCOG**

4. Fiscal Management (On-Going / Task Carried Over From Previous FYs)

Task 4.1: Invoicing

- Submit complete invoice packages to Caltrans district staff based on milestone completion—at least quarterly, but no more frequently than monthly.
- Responsible Party: SJCOG

Task 4.2: Quarterly Reports

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.
- **Responsible Party: SJCOG**

2. San Joaquin County Transportation Innovation Planning Study

1.0 Project Initiation

Task 1.1: Project Kick-Off (Complete)

- SJCOG will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- Responsible Party: SJCOG

Task 1.2: Staff Coordination (On-Going / Task Carried Over From Previous FYs)

- Monthly face-to-face project team meetings with consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to the project team meetings.
- Responsible Party: SJCOG

Task 1.3: Procure Consultant Services (Complete)

- Select a consultant(s) from short list using the proper procurement procedures.
- Responsible Party: SJCOG

2.0 Review, policy framework, innovations options and metrics

Task 2.1: Working Group (On-Going / Task Carried Over From Previous FYs)

- Establish potential working group members and send invitations to participate
- Host kick-off meeting to review working group structure, purpose and meeting schedule
- Responsible Party: Consultant & SJCOG

Task 2.2: Review current SJCOG and other local/regional initiatives (Complete)

- Assess the county's current state of transportation technology, and any innovations or infrastructure it currently lacks
- Responsible Party: Consultant

Task 2.3: Create a policy framework

- Following review tasks with working group, reach out to residents for their insight on how innovations can improve mobility for all, including for disadvantaged communities
- Create a policy framework to outline SJCOG regional role in advancing the adoption of transportation innovations in the region

Task 2.4: Metric Development

- Create a list of criteria that transportation innovations should improve in San Joaquin County and develop a methodology for weighing and ranking innovations based on what best fits San Joaquin County. Some criteria may include: Reduction in VMT, improved air quality, growth in transit ridership, improved travel times for transit and cars, total project cost and funding sources
- Using the criteria list, rank each innovation identified for San Joaquin County, incorporating feedback from working group, residents and local leaders
- Responsible Party: Consultant

Task 2.5: Innovation Options and Potential Funding

- Select one of the innovations evaluated in Task 2.4 that would benefit San Joaquin County
- Determine several alternative projects or scenarios to account for unforeseen technology and county developments
- Research potential funding opportunities
- Responsible Party: Consultant

3.0 San Joaquin County Transportation Innovation Final Report and Recommendation

Task 3.1: Prepare report with recommendation

- Summarize the assessment process and how each innovation scored, factoring community feedback
- Include funding options for advancing selected innovation from Task 2.5 in to a pilot study phase
- Review report with SJCOG and working group, and finalize report
- Responsible Party: Consultant

Task 3.2: Determine next steps to develop innovation

- Incorporate innovation findings in future Regional Transportation Plans
- Include innovation in planning and measurement models
- Find funding sources to advance the adoption of transportation innovation in San Joaquin County
- Develop scope for preliminary planning study, feasibility test, and demonstration projects and locations for implementing the recommended innovation
- Responsible Party: SJCOG

4.0 Transportation Innovation Pilot Project Planning

Task 4.1: Develop and release RFP for selected pilot project planning

- Building upon Tasks 2 and 3, release an RFP to advance the planning and implementation for a pilot project responsive to the selected transportation innovation in Task 2.5
- Responsible Party: SJCOG

Task 4.2: Receive and score proposals, and select “innovator” to develop pilot project

- Select an innovator using the proper procurement procedures
- Responsible Party: SJCOG

Task 4.3: Develop final pilot project, report and implementation plan

- Develop pilot project, report and implementation plan for selected transportation innovation in Task 2.5
- Responsible Party: Innovator/Sub-Grantee

5.0 Fiscal Management (On-Going / Tasks Carried Over from Previous FYs)

Task 5.1: Invoicing

- Submit complete invoice packages to Caltrans district staff based on milestone completion, as needed
- Responsible Party: SJCOG

Task 5.2: Quarterly reports

- Submit quarterly reports to Caltrans district staff summarizing project progress and grant expenditures
- Responsible Party: SJCOG

D. Products & Schedule for FY 21/22:

Gentrification & Displacement Risk Assessment of San Joaquin County

- On-going staff coordination meetings / meeting notes: July 2021 – June 2022
- Working group meetings / meeting notes, attendance list, interview/focus group transcripts: July 2021 – June 2022
- Quarterly reports and invoices – quarterly through June 2022
- Develop methodological toolkit – July – August 2021
- Identify displacement mitigation strategies – July – August 2021
- Prepare draft and final report – September – November 2021
- Prepare and convene Regional Displacement Symposium – November 2021-February 2022

San Joaquin County Transportation Innovation Planning Study

- On-going staff coordination meetings / meeting notes: July 2021 – June 2022
- Convene working group/expert panel to include outreach lists, meeting agendas,

summary meeting notes - July 2021 – June 2022

- Quarterly reports and invoices – quarterly through June 2022
- Metric Development – July 2021 – September 2021
- Innovation Options and Potential Funding – August 2021 – October 2021
- Prepare Final Report – October 2021 – December 2021
- Pilot Project Planning – December 2021 – February 2022

E. Funding Sources:

Senate Bill 1 FY 19/20 Estimated Carryover:	\$100,000.00
Local Transportation Fund:	\$ 30,000.00

F. Responsible Agency: SJCOG:
\$130,000.00

G. Staff Required: (person months)
SJCOG:
1

601.015 SB1 Adaptation Planning Grant Awarded in FY19/20 (Regional Resiliency Implementation Plan and Adaptation Guidance)

- A. Previous Work: In FY 20/21, project activities were initiated, including convening a working group and initiating stakeholder and community outreach. Greater detail for completed, on-going, and future tasks are noted as such in Section C, while completed work products/deliverables are noted below:

Completed work products from previous fiscal years:

- Project Initiation (Project Kickoff) – November 2019
- Procurement of Consultant Services – March – June 2020
- Working Group Meeting #1 – October 2020
- Needs Assessment Protocol – October – December 2020
- Public Outreach Survey – January – February 2021
- Stakeholder interviews – January – February 2021
- Regional Needs Assessment Report – March – April 2021
- Draft Prioritization Protocol – February - April 2021
- Working Group Meeting #2 – May/June 2021

- B. Purpose: To administer the FY 19/20 SB1 Adaptation Planning Grant: The objective of the Regional Resiliency Implementation Plan and Adaptation Guidance is to take the data and recommendations from the phase one Climate Adaptation and Resiliency study and develop a plan that will provide the framework and tools to address the previously identified asset vulnerabilities, planning gaps, and any functional or governance hindrances to advancing projects and programs to increase climate resiliency in the county. The final deliverables will include data evaluation tools and an adaptation planning implementation guide. This planning guide will prioritize policy statements and specific implementation actions to be taken based on overall level and timing of risk, cost of implementation, and likelihood of successful implementation.
- C. Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant – some tasks were completed in previous FYs are noted as such below; other tasks will roll-over to future OWPs):

1. Project Initiation

Task 1.1: Project Kick-Off (Complete)

- SJCOG will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- Responsible Party: SJCOG/Caltrans

Task 1.2: Staff Coordination (On-Going / Task Carried Over From Previous FYs)

- Monthly face-to-face project team meetings with consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to the project team meetings.

- Responsible Party: SJCOG

Task 1.3: Procure Consultant Services (Complete)

- Select a consultant(s) using the proper procurement procedures.
- Responsible Party: SJCOG

- **Task 1.4 Working Group (On-Going / Task Carried Over From Previous FYs)**
Contact working group members from Phase 1 Study and prepare schedule for monthly meetings. Invite new partners as needed

- Responsible Party: SJCOG

2. Engagement and Regional Needs Assessment (On-Going / Carried Over From Previous FY)

Task 2.1 Analysis Workshop #1

- Conduct a workshop/study session with working group members and stakeholders to review outcomes and objectives for the Regional Resiliency Implementation Plan and Adaptation Guidance, to include: assess outcomes and actionable items/recommendations from Phase 1 Study regional summit and identify missing and critical information needed from jurisdictions, regional transportation asset managers, and stakeholders.
- Responsible Party: SJCOG, Consultant

Task 2.2 Develop Needs Assessment Protocol

- With selected consultant, develop a needs assessment protocol that helps SJCOG understand any local barriers to moving regional adaptation and resiliency planning forward. Needs may include additional research, data, staff capacity, case studies or evaluation tools. This needs assessment will provide the opportunity to collect missing and critical information on functional, governance and other gaps that will impede the region’s ability to respond to climate stressors. This will help to inform local, regional, and statewide planning efforts currently underway or on the verge of beginning (e.g. mitigation plan updates, climate action plans, General Plan updates, or regional planning documents).
- Responsible Party: SJCOG, Consultant

Task 2.3 Targeted Interviews with Asset Managers, Local Agency Staff and Regional Decision Makers

- Schedule and execute focused interviews with regional asset managers, jurisdictional staff and other identified stakeholders. The interviewees should include as many non-transportation stakeholders as is practical so that potential co-benefits will be thoroughly understood (e.g. habitat, social and environmental justice). Community groups and regional decision makers should also be represented. These interviews will not only increase the understanding of local needs but help identify local resources and case studies from existing plans and previous efforts.
- Responsible Party: SJCOG, Consultant

Task 2.4 Community Engagement

- Engagement with the public is to be scheduled through events and surveys to collect San Joaquin County community member’s priorities. The questionnaire

used for the regional interviews will be the basis for the community engagement surveys. Specific engagement activities are to be scheduled within disadvantaged communities through the proposed mini-grant program.

- Responsible Party: SJCOG, Consultant

Task 2.5 Regional Needs Assessment Report

- Based on the results from Tasks 2.1-2.4, develop a Regional Needs Assessment Report that captures the adaptation planning needs of San Joaquin County. This report may also include research that is relevant to future studies or planning activities that will likely support local decision-making and policy changes. The report will also inform the development of technical support tools and identify communication needs.
- Responsible Party: Consultant

3. Draft Implementation Priorities List and Prioritization Protocol (On-Going / Carried Over From Previous FY)

Task 3.1 Develop Prioritization Protocol

- Vulnerability assessment from SJCOG's phase one study, applicable outcomes from the currently on-going Caltrans District 10 vulnerability assessment, and outcomes from the Delta Stewardship Council's vulnerability assessment for San Joaquin's Delta region will be synthesized with the Task 2 needs assessment to produce an initial list of policy actions, additional research, data needs, and new transportation project elements needed to insure increased resiliency of transportation infrastructure to identified extreme future climate events in San Joaquin County. Additional best practices from other regions will be reviewed and considered for inclusion, if applicable.
- Develop prioritization protocol - SJCOG will work with the consultant to research available data evaluation tools and select the appropriate tools for the prioritization protocol. Evaluation protocol will allow each option to be evaluated by cost of implementation, direct and co-benefits, time to full implementation, severity of timing of asset vulnerability addressed, likelihood of adoption, and number of identified key transportation assets addressed. Results will be grouped by both climate risk and asset category.
- Responsible Party: Consultant, SJCOG

Task 3.2 Stakeholder/Working Group Workshop #2

- Host a second workshop for stakeholders and working group members to present task 3.1 and 3.2 results. The group will provide feedback on the list of resiliency solutions and prioritization protocol for their ability to assist local and regional agencies in addressing planning gaps, barriers, issues, challenges, and constraints or advance policies, and projects that will advance resiliency implementation in San Joaquin County.
- Responsible Party: Consultant, SJCOG

Task 3.3: Finalize Prioritization Protocol and Produce Final Matrix of Priority Implementation Actions

- Based on task 3.2 results, develop final technical report of prioritization protocol
- Develop matrix of prioritized implementation actions

- Circulate to working group and key stakeholders for final comments
- Responsible Party: Consultant

4. Regional Resiliency Implementation Plan and Adaptation Guidance

Task 4.1: Regional Resiliency Implementation Plan and Adaptation Guidance Draft

- Based on task 3 results, develop final list of strategies and actions for inclusion in the draft plan. Content of the draft plan will include:
 - introduction to include a summary of previous work completed and the purpose of the plan
 - summary of the process of the plan development
 - a description of each strategy or action, the time frame for implementation, expected co-benefits, and implementation level (state, regional, local) – cross-referenced by transportation asset type and climate vulnerability addressed
- Circulate draft plan to working group and other key stakeholders for review and comments
- Responsible Party: Consultant

Task 4.2: Workshop/Study Session #3

- Convene working group and key stakeholders to discuss draft plan comments, needs of on-line toolkit/web data portal, and to identify next steps and implementation tracking
- Responsible Party: SJCOG, Consultant

Task 4.3 Final Regional Resiliency Implementation Plan and Adaptation Guidance

- Incorporate comments and feedback received into a final Plan, including next steps for implementation, further research needed, and appendices of technical reports
- Responsible Party: Consultant

Task 4.4: Develop Web-based Portal

- Develop adaptation web-page with final reports, data sources/downloads, best practices examples for projects and programs, implementation tracking metrics
- Responsible Party: SJCOG, Consultant

5. Fiscal Management (On-Going / Carried Over From Previous FY)

Task 5.1: Invoicing

- Submit complete invoice packages to Caltrans district staff based on milestone completion—at least quarterly, but no more frequently than monthly.
- Responsible Party: SJCOG

Task 5.2: Quarterly Reports

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.
- Responsible Party: SJCOG

D. Products & Schedule for FY 21/22:

Finalize Prioritization Protocol – July 2021

Develop Draft Regional Resiliency Implementation Plan and Adaptation Guidance – July – September 2021

Working Group Meeting #3 – October 2021

Final Regional Resiliency Implementation Plan and Adaptation Guidance – October – December 2021

Develop web-based portal – December 2021 – February 2022

E. Funding Sources:

Senate Bill 1 FY 19/20 Estimated Carryover: \$125,000.00

Local Transportation Fund: \$ 32,300.00

F. Responsible Agency: SJCOG:

\$157,300.00

G. Staff Required: (person months)

SJCOG: 1

601.016 SB1 MPO Sustainable Communities Formula Grants Awarded in FY20/21 (Active Transportation Plan in Priority Neighborhoods, Three-County Travel Demand Model Enhancements Project, Envision 2050 Project)

Previous Work: In FY 20/21, staff initiated project activities, including project kick-off meetings, consultant procurement activities. [Greater detail for completed and on-going tasks are noted as such in Section C, while completed work products/deliverables are noted below:](#)

1.Active Transportation Plan in Priority Neighborhoods

Work products completed in previous fiscal years:

- Project Initiation (Project Kick-Off) – November 2020
- Procurement of Consultant Services – December 2020 – February 2021
- Define project study areas – March – May 2021
- Develop outreach plan – April – June 2021

2.Three-County Travel Demand Model Enhancements Project

In FY 20/21, staff initiated project activities, including consultant procurement; kick-off meetings; and review of existing model structure, data, networks, and scripts.

Work products completed in previous fiscal years are:

- Project Initiation (Project Kick-Off) – November 2020
- Retain Consultant Services – July – August 2020
- Review and Revise Existing Three-County Model – October 2020 - June 2021

3.Envision 2050 Project

Work products completed in previous fiscal years:

- Procurement of Consultant Services – June 2020 - September 2020
- Project Initiation (Project Kick-Off) – November 2020
- Convene a Technical Advisory Group - November 2020
- Conducted a planning charrette series with technical advisory and RTP/SCS working groups – November 2020 – February 2021
- Develop draft and final Futures Framework – November 2020 – March 2021
- Develop draft and final Action Plan (January – March 2021)
- Develop and launch public outreach activities (February – May 2021)

B. Purpose: To administer the FY 20/21 SB1 Sustainable Communities Formula Grant and build a sustainable community and transportation system through two independent planning studies. The SB 1 Formula Grant is a program in which funds are distributed by formula to the Metropolitan Planning Organizations for award to eligible projects. The grant objectives are to encourage local agencies to further

state and regional goals, including and not limited to, the Regional Transportation Plan Implementation. The two planning projects below further the policies in the SJCOG RTP by addressing the multimodal transportation system needs, enhancing analytical tools on transportation system performance, engagement of vulnerable communities, and examination of public health and transportation impacts. The third planning project, Envision 2050, is included to support SJCOG's 2022 SCS Development. These planning activities directly play a role in helping policy makers move toward better informed transportation investment decisions.

1. Active Transportation Plan in Priority Neighborhoods: In efforts to advance public health priorities for San Joaquin County, SJCOG, in partnership with San Joaquin County Public Health Services, aims to conduct an Active Transportation Improvement Plan in communities facing higher rates of health disparities identified in the 2019 Community Health Needs Assessment and Community Health Improvement Plan (CHIP). This study will examine existing bike and walk infrastructure across the region, with a strategic focus on CHIP Priority Neighborhoods, in order to determine barriers vulnerable communities may face in accessing opportunities to improve physical health. SJCOG and its partner seek to determine program and project needs for improving public health, reducing congestion, and decreasing greenhouse gas emissions. The planning activities will further specific best practices from the 2017 RTP Guidelines Appendix K, including:

- Collaboration with non-transportation agencies, specifically San Joaquin County Public Health Services;
- Development of a list of potential infrastructure and non-infrastructure programs and projects to promote public health, especially safe walking and biking; and
- Strengthening engagement in communities affected by health disparities.

2. Three-County Travel Demand Model Enhancements Project: The Three-County Travel Demand Model covers Merced County, San Joaquin County, and Stanislaus County. SJCOG will be using the model as part of their 2022 RTP/SCS development. The project proposes to update the Three-County Travel Demand Model by:

- Adding new regional transit options and updating interregional bus transit routes;
- Enhancing the Model's sensitivity to future investments in public transit, bicycle and pedestrian infrastructure, transit-oriented development;
- Updating the model to account for introduction of autonomous vehicles; and
- Other enhancements not yet reflected on this list.

By enhancing the Three-County Model sensitivity to investments in bicycle, pedestrian, transit, autonomous vehicle technology, and transit-oriented development, the project aims to provide more accurate analyses in demonstrating the benefits of such investment on air quality conformity and meeting state greenhouse gas reduction targets.

3. Envision 2050: The Envision 2050 project will engage the San Joaquin region in a scenario planning effort that embraces future uncertainty, particularly from outside forces such as climate impacts, housing affordability, autonomous vehicles, and others. Ultimately, the project will frame a new conversation on how uncertainty and outside forces will stress the regional transportation system and what the

region should do to prepare. The Envision 2050 project will:

- Define foundational pillars from which the region will build its Sustainable Communities Strategy;
- Envision three distinct future scenarios and test a wide range of policy and investments strategies to understand how they perform under each future scenario; and
- Engage stakeholders and the public to provide input on how best to prepare the region for the future.

The information and data developed from these planning activities will be used to enhance the methods used in developing the RTP/SCS, as well as build upon local and regional efforts to implement sustainable communities throughout San Joaquin County. SJCOG intends to work in coordination with its local and regional partners to implement the planning activities included in this project scope. Additionally, the planning activities described align with several SB 1 Sustainable Communities Grant Objectives. The Active Transportation Plan in Priority Neighborhoods directly applies a health and social equity lens and aligns with state efforts to improve mobility and safety of active transportation users. The Three-County Travel Demand Model Enhancements Project will align state and regional efforts to promote sustainability in the transportation system by improving model sensitivity to investments made in bicycle, pedestrian, and transit projects. The Envision 2050 project activities will incorporate several Grant Objectives, such as sustainability, innovation, and economy, through a novel approach to scenario planning.

C. Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant – some tasks are complete and noted as such below; other tasks are on-going and may roll-over to future OWPs):

1. Active Transportation Plan in Priority Neighborhoods

1. Project Initiation

Task 1.1: Project Kick-Off (Complete)

- SJCOG will hold a kick-off meeting with Caltrans staff and Public Health Partner to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- Responsible Party: SJCOG

Task 1.2: Staff Coordination (On-Going / Task Carried Over From Previous FYs)

- Monthly face-to-face project team meetings with Public Health Partner, City Staff, and consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to the project team meetings.
- Responsible Party: SJCOG

Task 1.3: Procure Consultant Services (Complete)

- Select a consultant with City Staff and Public Health Partner using the proper procurement procedures.
- Responsible Party: SJCOG

2. Study Development

- **Task 2.1: Define Study Area(s) (On-Going, Task Carried Over From Previous FYs)**
Collaborate with Public Health Partner on developing criteria to focus planning efforts in selected CHIP neighborhoods for the study. Criteria may include geographic equity considerations, level of existing partnerships in neighborhoods, potential to enhance bicycle, pedestrian, and transit access, etc).
- Identify CHIP neighborhood(s) for inclusion in the planning study.

Task 2.2: Outreach (On-Going, Task Carried Over From Previous FYs)

- Work with Public Health Partner and city staff to develop a public outreach plan, utilizing the FY 17/18 SCS Implementation Study Outreach Scope as a starting point. The plan should include engaging key stakeholders such as local jurisdictions, neighborhood groups, as well as reaching out to the general public. Key Phases of outreach may include:
 - Phase One: Before beginning the study, inform the community about its background and receive comments on it thereafter. Identifying top priorities residents have for this study.
 - Phase Two: Go back out to the community and receive feedback on how to improve biking, walking, and transit access.
 - Phase Three: Build a conclusion from comments received and include in the final project list recommendations.
- Review and make appropriate adjustments to the FY 17/18 SCS Needs Assessment Protocol
- Responsible Party: SJCOG, Public Health Partner, and Consultant

Task 2.3: Existing Conditions Report

- Identify and map by mode and jurisdiction pavement conditions, bicycle and pedestrian facilities, and signal systems for all agencies.
- Assess commute and travel patterns and key activity centers in Priority Neighborhoods, as well as other relevant existing conditions.
- Responsible Party: SJCOG, Public Health Partner, and Consultant

Task 2.4 Conduct Analysis: Identify projects to address gaps, barriers, issues, challenges, and constraints

- Work with consultant, City Staff, and Public Health Partner to review findings on mobility challenges and barriers experienced by neighborhood residents as well as transportation access to destinations identified through outreach and walking audits.
- Review existing conditions and findings from public outreach to develop list of projects to address deficiencies and needed enhancements. In consultation with Caltrans, SJCOG, San Joaquin Public Health, and City staff.
- Categorize projects on a tiering system to present implementation activities that are low cost, medium cost, and high cost, or require longer periods of planning and coordination to deliver.
- For projects that need more planning and coordination, consult with city(ies) to identify funding opportunities, maintenance strategies, or other innovations in implementation. For example, Identify local, federal, and State funding sources by project type and location.
- Responsible Party: SJCOG, Public Health Partner, and Consultant

Task 2.5: Documentation

- Document recommendations and circulate a draft for review among Public Health Partner, City Staff, and community members.
- Provide final presentations to community members, and local agencies.
- Incorporate comments and feedback received into a final study

- Responsible Party: SJCOG, Public Health Partner, and Consultant

3.Fiscal Management

Task 3.1: Invoicing (On-Going, Task Carried Over From Previous FYs)

- Submit complete invoice packages to Caltrans district staff based on milestone completion-at least quarterly, but no more frequently than monthly.
- Responsible Party: SJCOG

Task 3.2: Quarterly Reports (On-Going, Task Carried Over From Previous FYs)

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.
- Responsible Party: SJCOG

2.Three-County Travel Demand Model Enhancements Project

1. Project Initiation

Task 1.1: Project Team Meeting (On-Going, Task Carried Over From Previous FYs)

- SJCOG and MCAG, along with, selected consultant, will meet to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.

Responsible Party: SJCOG

Task 1.2: Staff Coordination (On-Going, Task Carried Over From Previous FYs)

- Monthly face-to-face project team meetings with consultants to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget.

Responsible Party: SJCOG

- **Providing funding to modeling consultant procured in accordance with state/federal guidelines.** With a consultant secured near the end of FY 19/20, SB 1 funds are designated toward the contracted scope of services (with TJKM) to update the model in the FY 20/21 Overall Work Program. Identify funding partners for scope of services – SJCOG determined that the Merced County Association of Governments was a funding partner and negotiated a Letter of Understanding (LOA) for a funding contribution).

2. Review and Revise Three-County Model Transit Network

Task 2.1: Review Existing Three-County Model (Complete)

- With SJCOG and MCAG staff, review existing transit network to identify gaps that do not reflect current transit plans and expansions.
- Review existing inter-regional transit post processor to ensure proper functioning. The inter-regional transit post processor will be tested using actual RTP/SCS scenario data.
- Explore additional model enhancements or revisions that may improve the Three-County Travel Demand Model.

Responsible Party: Technical Consultant

Task 2.2: Update Three-County Model (Complete)

- With input from SJCOG and MCAG staff, technical consultant to lead the development of an updated Three-County Model. Enhancements may include, but are not limited to:
 - New transit options, which include codes for the ACE extension, proposed Valley Link Project, and bus service enhancements;
 - New land use input for transit-oriented development sites/projects;
 - New codes accounting for bicycle and pedestrian infrastructure;
 - Scripts that allow the model to account for varying levels of autonomous vehicles on the roadway network.

Responsible Party: Technical Consultant

Task 2.3: Calibration and Validation of Three-County Model (Ongoing / Task Carried over from FYs)

- Following Federal Highway Administration and Caltrans guidelines, each component of the model will be calibrated and validated to ensure that it produces reasonable forecasts.

Responsible Party: Technical Consultant

3. Fiscal Management

Task 3.1: Invoicing (Ongoing / Tasks Carried over from Previous FYs)

- Submit complete invoice packages to Caltrans district staff based on milestone completion—at least quarterly, but no more frequently than monthly.

Responsible Party: SJCOG

Task 3.2: Quarterly Reports (Ongoing / Tasks Carried over from Previous FYs)

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.

Responsible Party: SJCOG

3. Envision 2050 Project

1. Project Initiation

Task 1.1: Project Kick Off (Complete)

- SJCOG will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- Responsible Party: SJCOG

Task 1.2: Staff Coordination (On-Going / Task Carried Over from Previous FYs)

- Bi-weekly project team meetings with consultant team to ensure good communication on upcoming tasks and to make sure the project remains on time and within budget. Caltrans staff will be invited to the project team meetings, as needed.
- Responsible Party: SJCOG

Task 1.3: Procure Consultant Services (Complete)

- Select a consultant using the proper procurement procedures.
- Responsible Party: SJCOG

2. Define Envision 2050 Scenario Pillars

Task 2.1: Develop Action Plan (Complete)

- Develop and implement an action plan to define Envision 2050 Scenario Pillars (e.g. Technology & AV adoption, Climate Impacts, Housing Production, In & Out Commuting, Jobs & Economy, Vibrant Neighborhoods) using a mix of research methods, including data review of Phase 1 outreach results, literature review, expert panels, and key informant interviews.
- Responsible Party: Consultant / SJCOG

Task 2.2: Analysis and Summary of Results (Complete)

- Analyze results of Task 2.1 and provide recommendations for further defining the Envision 2050 Scenario Pillars, identifying associated planning assumptions along with potential strategies and expected impacts.
- Responsible Party: Consultant / SJCOG

Task 2.3: Draft Technical Memorandum (Complete)

- Summarize Task 2.1 and 2.2 in a draft technical memorandum
- Circulate Draft Technical Memorandum for review by SJCOG Board and standing committees, as well as stakeholders
- Responsible Party: Consultant / SJCOG

Task 2.4 Final Technical Memorandum (Complete)

- Complete the final technical memorandum addressing comments and feedback received from SJCOG staff, SJCOG Board and standing committees, including the RTP/SCS Working Group.
- Responsible Party: Consultant / SJCOG

3. Develop Tools & Models

Task 3.1: Define Tools and Models (On-Going, Task Carried Over From Previous FYs)

- Weigh pros and cons of potential scenario planning tools, predictive models, and engagement tools that could be deployed for the project
- Select tools to apply to Envision 2050 project
- Responsible Party: Consultant / SJCOG

Task 3.2: Model Testing and Validation/Calibration (On-Going, Task Carried Over From Previous FYs)

- Calibrate one (1) land use allocation tool and up to three (3) additional predictive or policy-based models selected in Task 3.1
- Responsible Party: Consultant / SJCOG

4. Create Envision 2050 Futures Framework

Task 4.1: Develop Futures Framework (On-Going, Task Carried Over From Previous FYs)

- Building from Task 2, create three distinct and potentially divergent, yet plausible, futures. Each future will be defined by a distinct set of planning assumptions that can be translated into metrics. For example: If Future 1 assumes 25% increase in extreme precipitation events, the associated metric might be that this will cause an additional 10-days of roadway flooding annually.
- Responsible Party: Consultant / SJCOG

Task 4.2: Strategy Comparisons and Metrics (On-Going, Task Carried Over From Previous FYs)

- Building from Task 2, further develop strategies to address the challenges posed by the three futures defined in Task 4.1.
- For each strategy, the following should be considered: cost of implementation, potential for success, funding availability, alignment with SCS goals, and any other considerations derived from previous tasks.
- Based on these considerations, each strategy will be assigned a point value which will become relevant in Task 5.
- Responsible Party: Consultant / SJCOG

Task 4.3: Integrated Futures and Strategies (On-Going, Task Carried Over From Previous FYs)

- Integrate Task 4.1 and 4.2 to create a final version of three future conditions for San Joaquin County, with associated planning assumptions, metrics, and strategies.
- Responsible Party: Consultant / SJCOG

5. Public Engagement: Public Outreach & Strategy Prioritization

Task 5.1: Stakeholder and Focus Groups (On-Going, Task Carried Over From Previous FYs)

- For audiences with expertise and knowledge of transportation planning issues and the role of SJCOG, utilize deliverables from Task 4 to create consensus-based prioritization exercises (e.g. creative outreach approach, collateral, table games/exercises).
- Conduct up to five (5) stakeholder/focus group events.
- Responsible Party: Consultant / SJCOG

Task 5.2: General Public Outreach (On-Going, Task Carried Over From Previous FYs)

- For the general public with less familiarity of transportation planning issues, present similar information as Task 5.1 with informative, interactive, and game-based exercises.
- Conduct up to five (5) civic engagement events.
- Responsible Party: Consultant / SJCOG

Task 5.3: Public Outreach Report (On-Going, Task Carried Over From Previous FYs)

- Summarize all public engagement for strategy prioritization into draft and final summary report, including recommendations on high performing strategies to be carried into the fiscally constrained RTP process.
- Circulate for review and comment by SJCOG Board, standing committees, and RTP/SCS Working Group.

- Responsible Party: Consultant/ SJCOG

6. Develop Land-Use & Transportation Model Scenario Inputs

Task 6.1: Land-Use Allocation Modeling

- Using public outreach input, deploy calibrated land use allocation tool to create up to three (3) land use allocations to various horizon years
- Responsible Party: Consultant / SJCOG

Task 6.2: Integrate RHNA Objectives

- Evaluate each of the three (3) land use allocations for consistency with RHNA objectives
- Responsible Party: Consultant / SJCOG

Task 6.3: Evaluation Year Forecasts

- Produce iterations of each of the three (3) land use allocations for up to four (4) horizon years: 2016, 2020, 2035, and 2050
- Perform detailed allocation review
- Responsible Party: Consultant / SJCOG

Task 6.4: Prioritized Policy, Program, and Project Lists

- Summarize three (3) land use allocations based on the package of strategies and associated programs and policies that define them
- Prepare Scenario Development Report to document all public engagement and technical elements related to the project
- Responsible Party: Consultant / SJCOG

Task 6.5: Land-Use and Transportation Model Inputs for SJCOG Travel Demand Model

- Provide SJCOG travel demand modeling team with required inputs in preferred format and specifications
- Responsible Party: Consultant / SJCOG

7. Final Plan Metric Development

Task 7.1: Review of Existing Plan & EIR Metrics

- Review adopted 2018 RTP/SCS and EIR to ensure selected metrics can be produced for the entire region, as well as key sub areas
- Responsible Party: Consultant

Task 7.2: Metric Testing

- Review metric assumptions for the RTP/SCS and EIR to ensure applicability with travel demand model and SCS requirements
- Responsible Party: Consultant / SJCOG

8. Fiscal Management (On-Going, Task Carried Over From Previous FYs)

Task 8.1: Invoicing

- Submit complete invoice packages to Caltrans district staff based on milestone

completion—at least quarterly, but no more frequently than monthly.

- Responsible Party: SJCOG

Task 8.2: Quarterly Reports

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.
- Responsible Party: SJCOG

D. Products & Schedule for FY 21/22 and Future FYs:

Active Transportation Plan in Priority Neighborhoods

- On-going staff coordination meetings / meeting notes: January 2021 – June 2023
- Community Outreach Preparation and Implementation: June 2021 - October 2021
- Existing Conditions Report: March 2022
- Analysis and Documentation: June 2023
- Quarterly reports and invoices – on-going through April 2023

Three-County Travel Demand Model Enhancements Project

- On-going staff coordination meetings / meeting notes: July 2020 – June 2023
- Model Calibration and Validation: July 2021 – December 2021
- Quarterly reports and invoices – on-going through June 2023

Envision 2050 Project

- **On-going staff coordination meetings / meeting notes: July 2020 – June 2022**
- **Draft land use allocations – July – October 2021**
- **TAZ Allocations – December 2021**

E. Funding Sources:

Senate Bill 1 FY 20/21 Estimated Carryover:	\$150,000.00
Local Transportation Fund:	\$ 38,000.00
Merced Association of Government	\$ 15,000.00

F. Responsible Agency: SJCOG:
\$203,000.00

G. Staff Required: (person months)
SJCOG: **TBD**

601.017 SB1 MPO Sustainable Communities Formula Grants Awarded in FY21/22 (Comprehensive AV and Alternative Fuels Vision for San Joaquin County and Economic Modeling Considerations for Policy Development)

A. Previous Work: This is a new grant activity for FY 21/22

B. Purpose: To administer the FY 21/22 SB1 Sustainable Communities Formula Grant and build a sustainable community and transportation system through two independent planning studies. The SB 1 Formula Grant is a program in which funds are distributed by formula to the Metropolitan Planning Organizations for award to eligible projects. The grant objectives are to encourage local agencies to further state and regional goals, including and not limited to, the Regional Transportation Plan Implementation. The two planning projects below further the policies in the SJCOG RTP by: 1. addressing multimodal transportation system needs, including supporting EV and technology infrastructure to reduce greenhouse gas emissions; and 2. Supporting and enhancing use of analytical tools to shape policies and strategies that will perform well under quickly evolving future conditions. Both planning projects will have a strong component of engaging with and considering the needs of vulnerable communities. The second planning project, REMI Economic Modeling for Policy Development, is included to support SJCOG's 2022 SCS development and plan implementation. These planning activities directly play a role in helping policy makers move toward better informed transportation investment decisions. **1.**

Comprehensive AV Vision for San Joaquin County: SJCOG is proposing a set of actions to address ZEV fueling within the County for various types of zero-emission and low carbon-emission vehicles, including all-electric vehicles, plug-in hybrid vehicles, hydrogen fuel cell vehicles, and vehicles that run on cleaner fuels such as biodiesel (also known as renewable diesel), compressed natural gas, and propane. This document will act as a connecting piece to the Alternative Fuels Corridor designation program.

Having a reliable network of charging and fueling stations for these vehicle types presents several benefits, including increasing driving range and accessibility for ZEV drivers traveling through the county and allowing the County and its local businesses to take advantage of state, federal, and private incentives, grants, and loans. In addition, it will generate economic activity as freight vehicles will stop in the County to fill up with alternative fuels and it will also allow for visitors passing through San Joaquin County to charge their vehicles or fill up with alternative fuels.

The infrastructure and facilities needed for alternative fuel vehicles (e.g., hydrogen fuel cell, biodiesel, compressed natural gas, and propane vehicles) are fundamentally different from those required for electric vehicles. The locations and types of fuel-dispensing systems are generally similar to those for conventional petroleum fueling stations; however, the specific facilities for alternative fuels (e.g., tanks, pumps) can differ from petroleum fuel-dispensing facilities and are regulated differently. SJCOG's role in promoting alternative fueling stations for clean energy vehicles are primarily to supply information to our local agencies and to the general public, and to help stakeholders secure financing and other incentives to install alternative fueling facilities.

SJCOG will focus on ensuring an adequate number and distribution of charging and

fueling stations for existing and future ZEVs, including personal and commercial vehicles, providing a model for major transportation corridors and similar regions within California. This policy document supports the implementation of renewable energy and transportation goals outlined in the Regional Transportation Plan/Sustainable Communities Strategy planning document.

Overall Project Objectives Are:

- Creation of a regional Alternative Fuels Corridor Ready Plan
- To better understand the existing conditions and needs of the region's alternative fuels network
- Utilize this process and approved plan to submit for any NHS segments to be designated within the Alternative Fuels Corridor Program
- Planning for zero or near emission vehicles/EV charging infrastructure network planning
- Optimization of transportation efficiency and shared mobility services

These objectives support overall agency goals of sustainability, accessibility, innovation, and economy. They also further currently on-going work of the agency in support of equity in provision of multi-model EV and technology for vulnerable communities and their transportation needs.

2. Economic Modeling Considerations to Support Policy Development: In a previous SB-1 formula funded planning study, SJCOG, with the help of the Center for Business and Policy Research, instituted the Regional Economic Model (REMI) to better coordinate its population, housing, and jobs forecasting with its mega-region partners (San Francisco Bay Area and Sacramento). The resulting work products from the previous study included enhanced forecasting capabilities to conduct the regional forecast for the 2022 RTP, a proto-type economic model for future work in transportation and housing policy testing, and a pilot study report outlining future uses of the model in SJCOG's future policy development. This proposed study will take the modeling to the next level and implement the REMI model to produce three to four white papers and technical analysis to answer pressing policy questions arising from SJCOG's Envision 2050 project (also SB1 funded) for the SCS in the development of the 2022 RTP. The work will be used to outline future implementation recommendations for established policies and strategies as well as those currently being developed. This work will be conducted in concert with SJCOG's on-going collaborative partnership with University of the Pacific Center for Business and Policy Research under WE 801.02.

C. Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant – some tasks will roll-over to future OWPs):

1. Comprehensive EV and Alternative Fuels Vision for San Joaquin County:

Creation of a regional Alternative Fuels Corridor Ready Plan to better understand the existing conditions and needs of the region's alternative fuels network. This plan will further RTP/SCS goals and priorities, as well as evaluate connection gaps of both EV

and alternative fueling locations. This plan intends to coincide with FHWA's Alternative Fuels Corridor Program process. This plan will optimize transportation efficiency and better integrate alternative fuels and the infrastructure needed for our regional roadways.

Task 1: Project Administration

Task 1.1: Management and oversight of project and deliverables, as well as invoicing

Task 1.2: Staff will coordinate on bi-weekly check-in meetings to go over program progress

Task 2: Existing Conditions: Determine connection gaps of alternative fuels along major corridors

Task 2.1: Evaluation of the existing transportation network related to Alternative Fuels, including:

- ○ EVs
- ○ Hydrogen
- ○ Propane
- ○ Liquid Natural Gas
- ○ Compressed Natural Gas

Task 2.2: Existing conditions technical report (draft and final)

Task 3: Analysis

Task 3.1: Analyze existing conditions and determine implementation schedule associated with filling in connection gaps

Task 3.2: Analyze the overall charging network

Task 3.3: Identification of programs and incentives

Task 3.4: Incorporation of current and on-going efforts related to alternative fuels within San Joaquin County (Innovation study/STEP grant program)

Task 3.5: Consistency documentation with Alternative Fuels Corridor program

Task 3.6: Consistency documentation with state, local, and Federal requirements

Task 3.7: General siting of charging/fi locations (including types) and/or prioritization of siting in general location

Task 3.8: Report outlining inclusion and considerations for all planning documents outlined in the grant program guidelines

Task 3.9: Analysis of freight network and improvement to alternative fueling locations

Task 3.10: Develop recommendations for reducing GHGs through strategies related to EV/alternative fuels technology

Task 3.11: General funding and costs to implement at the local level, to inform our partner agencies

Task 4: Public Outreach

Task 4.1: Conduct meetings to inform the public.

Task 4.2: Creation of a TAC of stakeholders and/or subject matter experts

Task 4.3: Coordination with Electrify America

Task 5: Draft and Final Plan

Task 5.1: Creation of a draft and final plan

Task 5.2: Board updates, as needed

Task 5.3: Board approval of final plan

2. Economic Modeling Considerations for Policy Development

Task 1: Project Administration:

Task 1.1: Management and oversight of project and deliverables, as well as invoicing

Task 1.2: Staff will coordinate on bi-weekly check-in meetings to go over program progress

Task 2: Determination of Transportation/Land-Use Policies to Examine

Task 2.1: Review work-products from Envision 2050 SCS Development (on-going SB1 FY 20/21 Award Formula Funded project). Relevant deliverables include development of foundational “pillars” or focus areas, prioritized strategies for each focus area, and recommended project/policy solutions.

Task 2.2: Review work-products from other relevant on-going planning studies. These may include the San Joaquin County Transportation Innovation Study, Gentrification and Displacement Risk Analysis, Transportation Resiliency and Adaptation Study, San Joaquin County Truck Study, Valleywide Housing Study, SJCOG Regional Housing Priorities, and others as appropriate.

Task 2.3: Produce draft report of recommended policy analysis topics based on review in tasks 2.2 and 2.3, including discussion of data sources and costs, updates/changes additions to modeling tools (REMI, IMPLAN, others), connection to SJCOG’s implementation activities and policy priorities, and schedule to deliver. Initial topics for consideration include:

- Long-term COVID induced effects on housing markets (housing location and types).
- Long-term COVID effects and business sector mix and economic development efforts in San Joaquin County.
- Anticipated effects in San Joaquin County related to business and transportation automation.
- Economic effects of widespread provision of EV and alternative fuels infrastructure in San Joaquin County (including auto, transit, and bicycle/pedestrian options).
- Enhanced modeling of economic impact of projects and programs in the 2022 RTP/SCS.
- Analysis of tie between economic development, migration patterns and commute trip estimation.

Task 2.4: Report presentation for SJCOG staff, committees, Board for review and input.

Task 2.5: Final report of recommendations and priority topics.

Task 3: Analysis and development of white papers/presentations

Task 3.1: Finalize data and models; conduct testing

Task 3.2: Produce data and analyses for initial review by staff and outside experts if warranted.

Task 3.3: Revise analyses as needed; produce draft white papers (three to four).

Task 3.4: Final white papers after staff and expert review as needed.

Task 3.5: Present each paper to SJCOG Board and conduct public webinar.

Task 4: Fiscal Management

Task 4.1: Invoicing

- Submit complete invoice packages to Caltrans district staff based on milestone completion—at least quarterly, but no more frequently than monthly.

Task 4.2: Quarterly Reports

- Submit quarterly reports to Caltrans district staff providing a summary of project progress and grant/local match expenditures.

D. Products & Schedule:

1. Comprehensive EV and Alternative Fuels Vision for San Joaquin County

- **Project kick-off meeting / meeting notes- July 2021**
- **Execute consultant contract – July-August 2021**
- **On-going staff and consultant coordination meetings / meeting notes- July 2021 – July 2023**
- **Establish technical working group/expert panels: membership/meeting schedule – August 2021**
- **Public outreach recommendations and schedule – September 2021**
- **Existing conditions report (draft and final) - October-November 2021**
- **Analysis technical report (draft and final) compiling interim work products for Tasks 3.1 to 3.11 - November - December 2022**
- **Public outreach and stakeholder coordination meetings - January – March 2023**
- **Public and stakeholder input report with recommended changes/additions to final deliverables – April 2023**
- **Draft and final project report – June/July 2023**

2. Economic Modeling for Policy Considerations:

- Project kick-off meeting / meeting notes- July 2021
- Execute consultant contract – July/August 2021
- On-going staff and consultant coordination meetings / meeting notes – July 2021 – September 2022
- Draft Report of recommended policy topics and data needs/modeling methodology – August/September 2021
- Final Report of recommendations – September 2021
- Analysis and White Paper Development - September 2021 – September 2022 (quarterly report development and presentations/webinars).

E. Funding Sources:

Senate Bill 1 FY 21/22: \$341,671.00
Local Transportation Fund: \$ 50,000.00

F. Responsible Agency: SJCOG:
\$391,671.00

G. Staff Required: (person months)
SJCOG:
TBD

601.02 REGIONAL TRANSPORTATION PLAN STUDIES

- A. Previous Work: Over the last several years, numerous transportation planning studies have been conducted which materially contributed to the formulation of various Regional Transportation Plan elements. This has included corridor studies, access improvement studies, roadway and highway operational improvement planning, new alignment studies, corridor project sequencing and financial plans. These studies and analyses are conducted using Federal and state planning provisions. These studies are an essential part of SJCOG's work as an RTPA and MPO. These studies include significant involvement from other agencies and significant public involvement.
- B. Purpose: These studies are to identify workable solutions to San Joaquin County mobility problems. These solutions are to be included in the Regional Transportation Plan as funding allows. Develop illustrative projects outside of constrained planning process.
- C. Tasks:
- a. Foster continued partnerships with local and state agencies to assess and to identify regional transportation planning studies for development.
 - b. Collaborate with partners on any policies, strategies, programs related to the Highway 99 Business Plan. Includes analysis of regional transportation planning issues that enhance the movement of people on the regional, interregional, and statewide Highway 99 system and any issues affecting access to major freight routes, intermodal transportation, and airports.
 - c. Initiate and explore unfunded transportation needs on regional corridors and conduct conceptual feasibility analysis, as needed.
 - d. Participate with San Joaquin Valley partners in additional planning efforts related to the Highway 99 Business Plan.
 - e. Participate in local agency or Caltrans led project study reports for regionally significant efforts.
 - f. Prepare staff reports, topical reports, or issues papers related to regional transportation infrastructure and their planning/programming challenges, including the identification of planning areas or specific corridors requiring further study.
 - g. Monitor planning studies and ensure these efforts are consistent with the regional congestion management process.
 - h. Participation in Tuolumne County led Strategic Partnership Grant for Active Transportation Study in Multiple Counties, including local match.
 - i. Foster continued partnership with Alameda County Transportation Commission (ACTC) and Bay Area partners on studies or technical analyses related to I-205 Corridor.
 - j. Prepare technical report(s) or study (ies) on regional corridors.
- D. Products & Schedule:
- a. Meetings on efforts on Highway 99 Business Plan – Operational Activities with Deliverables Reported on Quarterly Basis.

- b. Correspondence on planning study activities on key CMP Corridors to ensure CMP consistency– As needed with work completing in June 2021.
- c. Written Correspondence and e-mail communication documenting work on Tuolumne County led Active Transportation Study through meetings, document review, technical assistance, including local match funding— Operational Activities with Deliverables Reported on Quarterly basis.
- d. Technical reports and issues papers related to regional transportation infrastructure – Operational Activities with Deliverables Reported on Quarterly Basis.
- e. Meetings and correspondence related to furthering the Highway 99 Business Plan – Operational Activities with Deliverables Reported on Quarterly Basis.
- f. Meetings Caltrans (led) on I-5, I-205, Hwy-120, and SR-99 Corridor Management Plan including, correspondence, document review, and technical assistance– Operational Activities with Deliverables Reported on Quarterly Basis.
- g. Written recommendations on identifying any projects requiring further planning study – Operational Activities with Deliverables Reported on Quarterly Basis.

E. Funding Source:

Local Transportation Authority MK-COG	\$ 90,957.00
Local Transportation Authority MK-PM	\$138,000.00

F. Responsible Agency:

SJCOG
\$ 228,957.00

G. Staff Required: (person-months)

SJCOG
8.0

602.01 TRANSPORTATION IMPROVEMENT PROGRAMS

- A. Previous Work: Adopted a 2021 FTIP update and processed several amendments. Adopted a Regional Transportation Improvement Program to reflect the State Transportation Improvement Program funding for San Joaquin County.
- B. Purpose: The Federal Transportation Improvement Program is the programming document that carries out the federal mandates of the FAST Act, complies with the requirements of the Clean Air Act Amendments, and implements the priorities of SJCOG's Regional Transportation Plan. The Federal Transportation Improvement Program provides a snapshot of all near term, regional significant transportation projects with funding sources available or committed in San Joaquin County. In contrast, the Regional Transportation Improvement Program is a vehicle for requesting funds for new projects through the State Transportation Improvement Program administered by the California Transportation Commission. The Transportation Improvement Program project requests are drawn from the Regional Transportation Plan and Congestion Management Program process requirements.
- C. Tasks:
1. Manage and monitor STIP/RTIP/
 2. Prepare 2022 STIP.
 3. Manage and monitor FTIP.
 4. CTIPS database maintenance for FTIP and STIP projects.
 5. Develop a tracking process that ensures RTIP projects seeking an allocation of funds, known as an "allocation vote" from the California Transportation Commission are in compliance with the FTIP approved programming.
 6. Assist local agencies to prepare RTIP amendments and fund vote requests (i.e. allocation votes from California Transportation Commission), as well as technical assistance related to all federal funding programs under the FAST Act.
 7. Prepare FTIP amendments.
 8. Monitor obligational authority and federal regulatory compliance (scope eligibility, funding (local match) ratios, and financial constraint requirements) for CMAQ Program of Projects.
 9. Monitor obligational authority and federal regulatory compliance (scope eligibility, funding (local match) ratios, and financial constraint requirements) for STBG Program of Projects.
 10. Facilitate and participate in discussions on federal programming topics with general public, SJCOG Committees, regional/state/federal programming working groups, and other stakeholders related to federal project screening, federal funding regulations and procedural requirements.
 11. Facilitate the programming/implementation of STBG Program of Projects.
 12. Facilitate the programming/implementation of CMAQ Program of Projects.
 13. Evaluate the effectiveness of the FTIP in meeting federal requirements for federal transportation Performance Measures (PM); specifically PM 1

(highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program).

D. Products & Schedule:

1. Oversight of State Transportation Improvement Program of Projects – As required with California Transportation Commission approved STIP Guidelines – monthly through June 2022
2. 2022 STIP – December 2021.
3. Documentation of Amendments to Federal Transportation Improvement Program – As required by project implementation – monthly through June 2022.
4. Participate in CTIPs and any statewide discussion on TIP programming– Operational Activities with Deliverables Reported on Quarterly Basis.
5. Technical memoranda or correspondence related to federal funding apportionments and obligations of CMAQ Program to ensure consistency with FTIP Program of Projects and Financial Plan– quarterly through June 2022.
6. Written technical reports which monitor federal funding apportionments and obligations in RSTP Program to ensure consistency with FTIP Program of Projects and Financial Plan– monthly through June 2022.
7. Agendized meetings of federal programming activities with various committees and working groups– monthly through June 2022.
8. Documented updates to RSTP Lump Sum List and ensure accurate listing and adherence to federal programming requirements—Monthly through June 2022.
9. As part of Type 3 FTIP amendments, report on how project adjustments and project implementation is helping SJCOG meet established goals for PM 1, PM 2, and PM 3 – as needed through June 2022.

E. Funding Source:

Federal Highway Administration PL - \$ 171,046.00-Toll Credit 19,618.98

STIP PPM FY 21/22 \$ 50,606.00
Local Transportation Authority-MK-PM \$ 0.00

F. Responsible Agency: SJCOG
\$ 221,652.00

G. Staff Required: (person-months)
SJCOG
18.0

603.01 STREETS AND HIGHWAYS COORDINATION

- A. Previous Work: SJCOG has provided ongoing technical assistance for the delivery of local roadway and state highway facilities throughout San Joaquin County. This includes participation in the delivery of projects funded through the Measure K Congestion Relief and Railroad Crossing Safety programs, the State Transportation Improvement Program (STIP), and local funds. SJCOG has also provided direct project management for a number of Measure K Congestion Relief projects. With passage of the Measure K Renewal Program as well as the State Proposition 1B Transportation Bonds in November, 2006, SJCOG is providing direct project management support to additional projects funded by these programs. SJCOG also works closely with Caltrans to monitor and participate and project delivery activities of State Highway improvements, including cost, scope and schedule, pursuant to SB45. SJCOG is also an active member of Project Development Teams for regionally significant projects throughout the County.

In FY 2017/2018, the SJCOG Board approved almost \$20 million of Measure K-funded Bicycle/Pedestrian/Safe Routes to School and Smart Growth Projects. An additional Measure K-funded Bicycle/Pedestrian/Safe Routes to School call for projects occurred in FY 2019/20 with an additional call slated for FY 21/22, substantially increasing the total number of projects under the combined programs. These projects all require oversight and contract administration by SJCOG for several years to monitor project initiation through project construction completion/implementation.

- B. Purpose: To provide technical assistance for the delivery of local roadway and state highway facilities, and bicycle/pedestrian/safe routes to school projects. To provide project management for Measure K Congestion Relief projects and Measure K Renewal Early Action Program of Projects. To provide project oversight and direct involvement in the delivery of Proposition 1B Transportation Infrastructure Bond projects, SB 1 funded projects, as well as Trade Corridor Improvement Fund projects. For Measure K, STIP and Proposition 1B or SB1 projects this includes the selection and administration of consultant contacts for purposes of project development and project management. This work element also includes project oversight and direct involvement in the delivery of State Highway Project Study Reports and other Preliminary Engineering Studies. This may include work related to the selection and administration of consultant contracts for this purpose. To participate in Project Development Teams and technical review of products. To interact with project sponsors and Caltrans.

- C. Tasks:

1. Provide ongoing project level technical assistance for the delivery of local roadway and state highway facilities throughout San Joaquin County.
2. Coordination of local and state highway, bicycle/pedestrian/ safe routes to school projects for Measure K Renewal Program.
3. Identify development of Project Study Reports (PSRs) or Project Initiation

- Documents (PIDs).
4. Monitor SB 45 Reports, other project delivery and project cost information per the Caltrans MOU and attend Project Delivery meetings.
 5. Oversee the delivery of project development components of Measure K, Measure K Renewal Program, STIP, SB1 projects, coordinating with Caltrans, FHWA, local jurisdiction and technical consultant support.
 6. Develop, procure and administer consultant contracts for purposes of project delivery, construction, and project management as it relates to Measure K funded projects.
 7. Prepare periodic delivery and progress reports for Measure K Renewal, state/federally funded programs including STIP and SB1.
 8. Review preliminary engineering project reports and environmental documents to provide input from a planning, programming and air quality conformity perspective as an RTPA and MPO.
 9. Staff and implement the SJCOG Project Development Committee.
 10. Continue work on Environmental document and subsequent Preliminary Design phases for the SR 99/120 Connector Project.
 11. Continue work on the project development activities related to various regional arterials in the Measure K Program.
 12. Where applicable, implement the Planning and Environment Linkages (PEL) process which is a collaborative and integrated approach to transportation decision-making. Incorporating PEL means to consider benefits and impacts of proposed transportation system improvements to the environment, community, and economy during the transportation planning process.

D. Products & Schedule:

1. Meetings with partners in the delivery of Measure K local roadway – Operational Activities with Deliverables Reported on Quarterly Basis, through June 2022.
2. Correspondence related to coordination of local and state highway projects for Measure K Renewal, including close-out activities for construction on pertinent state highway projects. – Operational Activities with Deliverables Reported on Quarterly Basis, through June 2022.
3. Meetings with partners to identify and participate in the development of Project Study Reports and Project Initiation Documents— monthly through June 2022.
4. Technical memoranda and related correspondence which develop information, set priorities and prepare Project Nominations— Operational Activities with Deliverables Reported on Quarterly Basis., through June 2022.
5. Project level technical assistance to local partner jurisdictions— Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
6. Delivery reports under SB 45 and any other reports required by the California Transportation Commission – Quarterly through June 2022.
7. Management of consultant contracts for project delivery where SJCOG

serves as lead agency – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.

8. Review of project preliminary and technical reports as a RTPA and MPO – as needed through June 2022.
9. Prepare for and hold Project Development Committee meetings through June 2022.

E. Funding Sources:

STIP PPM 20/21 Estimated Carryover:	\$ 100,000.00
STIP PPM 21/22	\$ 239,394.00
Local Transportation Fund – COG	\$ 0.00
Local Transportation Authority-MK PM	\$ 0.00

F. Responsible Agency:

SJCOG
\$339,394.00

G. Staff Required: (person-months)

SJCOG
34.0

603.015 I-205 MANAGED LANES PROJECT DEVELOPMENT

A. Previous Work: N/A

B. Purpose: To provide technical assistance for the delivery of project development activities for the I-205 Managed Lanes Project. The project proposes to widen I-205 from 6 to 8 lanes. This work element also includes project oversight and direct involvement in the delivery of the Project Approval and Environmental Document in the next three years (starting the last quarter of FY 19/20 through FY 22/23) and may include subsequent project development activities such as Plans, Specifications, and Estimates after completion of the Environmental Document. The project has secured an E76 authorization to proceed from Caltrans (dated November 2019).

C. Tasks:

1. Coordination of FHWA Project of Division Interest process and all FHWA requirements
2. Organize & implement kick-off meeting to be held for the introduction of staff, roles and responsibilities, establishment of communication channels, clarification of procedures and formats to be used and discussion of design considerations.
3. Organize and lead Project Development Team (PDT) meetings for the review of project status and the determination of need actions; prepare all PDT meeting notices, agenda and minutes.
4. Organization, participation and presentations at meetings held by lead agency staff with elected officials, neighborhood groups, and other stakeholders.
5. Coordination with consultants and other public agencies.
6. Coordination with utility companies to identify conflicts and relocation plans.
7. Coordination with Union Pacific Railroad.
8. Development and monitoring of critical path schedule, project expenditures, monthly invoices, and progress reports.
9. Preparation of all required environmental studies and documentation necessary for CEQA/NEPA approvals. The anticipated level of environmental document is an Environmental Impact Report/Environmental Assessment (EIR/EA).
10. Freeway/Maintenance Agreement support.
11. Preparation and/or peer review of technical environmental reports and analyses (greenhouse gas studies, traffic studies, value analysis study, noise studies, resource and regulatory permits etc.).
12. Project Report (Preliminary Engineering).
13. Public hearings, map showings, and public outreach for CEQA/NEPA approvals.
14. Preparation of Supplemental Project Initiation Document (PID) as required by Caltrans District 4 for revised project scope and limits.
15. Preparation of Value Analysis Study.

D. Products & Schedule:

The final work product would be the I-205 Project Approval and Environmental Document to be completed by FY 22/23.

All tasks above will be ongoing activities through June 2022 and continue beyond June 2023.

E. Funding Sources:

Congestion Mitigation and Air Quality(CML6088-068)	\$ 1,073,330.00
Highway Infrastructure Program(CML6088-068)	\$ 686,996.00
Regional Surface Transportation Program(CML6088-068)	\$ 661,476.00
Regional Transportation Impact Fee	\$ 313,771.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$ 0.00	\$ 2,735,573.00

G. Staff Required: (person-months)

SJCOG Consultant Contract

603.02 TRANSIT COORDINATION AND PLANNING

- A. Previous Work: This effort has been undertaken in conjunction with the efforts of San Joaquin Regional Transit District (RTD), transit providers throughout the county, FTA and Caltrans District 10. SJCOG has been highly involved in transit planning and coordination. In FY 19/20 this has included work on the Proposition 1B PTMISEA and TSSSDRA Program Expenditure Plan and corresponding amendments, FTA 5311 Program of Projects, and FTA 5310 application review, the annual unmet needs process, participation on development and review of short range transit plan updates, and the Measure K Renewal Strategic Plan Update. SJCOG continues work with San Joaquin Regional Rail Commission (SJRRRC), High Speed Rail Authority, Tri-Valley San Joaquin Valley Rail Authority, and Bay Area Partners on the study of passenger rail service and connectivity improvements on the Altamont Pass, to Sacramento and throughout the San Joaquin Valley. SJCOG is active in development and/or implementation of Measure K operating and capital cooperative agreements with RTD and other operators; staff the Social Services Transportation Advisory Committee (SSTAC), and Interagency Transit Committee (ITC); and is an ex-officio member of the Regional Rail Commission. SJCOG completed Proposition 1B PTMISEA, TSSSDRA, and Homeland Security project selection and allocations and the Measure K Renewal Transit Section allocations.
- B. Purpose: To comply with Federal Transit Administration and state mandates. To assure that transit services in the county are fully coordinated. To increase transit ridership and efficiency in San Joaquin County. To increase accessibility and mobility for the transportation disadvantaged. To coordinate Measure K passenger rail and bus Project delivery and administration. Develop and implement rational strategies that optimize the ability for people on welfare to access employment opportunities. To coordinate with RTD, SJRRRC and all transit operators in the County to prepare short range and comprehensive transit planning documents.
- C. Tasks:
1. Prepare FTA 5311 Program of Projects for FY 20-21. Monitor delivery of Program of Projects (*funded with LTF/State Transit Assistance and not CPG*).
 2. Prepare 5310 funding call for projects, review funding recommendations and programming in conjunction with Caltrans. Periodic monitoring of delivery of Program of Projects (*funded with LTF/State Transit Assistance and not CPG*).
 3. Coordinate review of Final OWP and Planning Studies, opportunities for review with all transit providers in the county. Ensure transit is aware of and represented in all appropriate studies (funded with CPG).
 4. Participate in policy and technical working group for Rail planning efforts

- and any studies with SJRRC, SJJPA, High Speed Rail Authority, and the Tri-Valley – San Joaquin Valley Regional Rail Authority. Review Final technical products. Develop/participate in public outreach sessions. *(funded with LTF/State Transit Assistance and not CPG)*
5. Continue staff support and coordination of the ITC (funded with CPG).
 6. Serve as staff and oversee activities of the Social Service Transportation Advisory Committee. Prepare and implement annual work program (*funded with LTF/State Transit Assistance and not CPG*).
 7. Assist with bus transit financial and operational planning. Activities will include assistance with grant applications, ensuring coordination among different transit providers and consistency between their plans and regional transit plans, monitoring transit performance, and keeping track of the lapsing date of various FTA funds (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
 8. Participate as ex-officio member of Regional Rail Commission. Provide staff support to Rail Commission and other rail committees. Rail Commission Board meetings are held monthly. Technical meetings or correspondence to support Rail activities occur at least monthly (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
 9. Coordination of passenger rail and bus transit projects for Measure K. (*funded with Measure K and not CPG*)
 10. Prepare Transit Unmet Needs Analysis and report (*funded with CPG*)
 11. Conduct outreach efforts to traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e. Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders (*funded with CPG*).
 12. Develop/amend Measure K Renewal Coops with RTD, RRC and other transit operators, as applicable (*funded with Measure K and not CPG*).
 13. Monitor and implement planning activities per approved Memorandums of Understandings (MOUs) with rail and bus transit operators in the region. These MOUs reflect the latest FHWA/FTA planning regulations and better articulate roles and responsibilities between the MPO and transit operator (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
 14. Staffing and oversight of the Transit Ad Hoc Committee which will examine MOUs with regional transit providers and develop recommendations for comprehensive assessment and programming of local, state, & federal funds (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
 15. Ensure compliance to federal Transit Asset Management Plan guidelines. (*funded with LTF/State Transit Assistance and not CPG*)

D. Products & Schedule:

SJCOG

1. Meetings, staff reports, and correspondence to document activities where SJCOG serves as staff and oversee activities of the Social Service Transportation Advisory Committee and the Interagency Transit Committee.
2. Prepare and implement annual work program (*funded with LTF/State Transit Assistance* – Operational Activities with Deliverables Reported on

- Quarterly Basis).
3. Meetings and correspondence to assist with bus transit financial and operational planning (*funded with Measure K/LTF/State Transit Assistance*). – Operational Activities with Deliverables Reported on Quarterly Basis
 4. Meetings and correspondence to assist with passenger rail financing plans and efforts (*funded with Measure K/LTF/State Transit Assistance and not CPG*)– Operational Activities with Deliverables Reported on Quarterly Basis.
 5. Meeting attendance to participate as ex-officio member of Regional Rail Commission (*funded with Measure K /LTF/State Transit Assistance, not CPG*) – Operational Activities with Deliverables Reported on Quarterly Basis.
 6. Meeting attendance to participate as a technical advisory member for the Tri-Valley- San Joaquin Valley Regional Rail Authority (*funded with Measure K /LTF/State Transit Assistance, not CPG*)– Operational Activities with Deliverables Reported on Quarterly Basis.
 7. Meeting attendance and correspondence related to coordination of passenger rail and bus transit projects for Measure K (*funded with Measure K not CPG*) – Operational Activities with Deliverables Reported on Quarterly Basis.
 8. Complete Unmet Transit Needs Analysis Report for FY 21/22 – June 2022 (funded with CPG).
 9. Completed Development submittal and recommended selection of FTA 5310, and 5311, grant applications (*funded with LTF/State Transit Assistance, not CPG*) – Operational Activities with Deliverables Reported on Quarterly Basis
 10. Work products from the Transit Ad Hoc Committee – through June 2022 (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
 11. Document public transit outreach efforts and meetings with traditionally under- represented and under-served populations and their community leaders- Operational Activities Reported on Quarterly Basis (funded with CPG).
 12. Meeting agendas and staff reports to maintain role of ITC in planning process– Operational Activities with Deliverables Reported on Quarterly Basis (funded with LTF/STA).
 13. Meeting attendance in policy and technical working group for ACE forward Merced to Sacramento corridor per MOU with corridor participants and California High Speed Rail Authority. Written comments on final technical products;
 14. Meeting attendance in public outreach sessions (*funded with Measure K /State Transit Assistance, not CPG*) – Operational Activities with Deliverables Reported on Quarterly Basis.
 15. Monitor and periodically attend Amtrak San Joaquins Joint Powers Authority meetings (*funded with Measure K /State Transit Assistance, not CPG*) – Operational Activities with Deliverables Reported on Quarterly Basis.

E. Funding Sources:
 FTA (5303) \$ 150,000.00 – Toll Credits 17,205.00
 State Transit Assistance \$ 134,391.00
 SJTRD STA Passthrough \$ 525,894.00
 SJRTD FTA 5311 Passthrough \$ 176,940.00
 Local Transportation Authority MK-PM \$ 0.00

F. Responsible Agency
SJCOG \$ 284,391.00
SJRTD \$702,834.00

G. Staff Required: (person-months)
SJCOG
 19.0

603.03 TRANSPORTATION AND AIR QUALITY PLANNING\MODELING AND DATA COLLECTION

- A. Previous Work: The San Joaquin Council of Governments (SJCOG) has a proven commitment to making transportation investments that improve air quality. Performed air quality conformity determinations for the Regional Transportation Plan and Federal Transportation Improvement Program. This work requires coordination with other Valley MPOs, the California Air Resources Board, and the San Joaquin Valley Unified Air Pollution Control District as described more fully in Work Element 801.06.

SJCOG conducted an update to the SJCOG travel demand model. This updated model will be used for the 2022 RTP update and FTIP, and accompanying air quality conformity analysis. In addition, SJCOG - currently utilizes EMFAC2017 for all air quality analysis.

- B. Purpose: Transportation and air quality must be linked in the planning process to assure achievement and maintenance of state and federal air quality standards in San Joaquin County. This is brought home by links between air quality and transportation provided in the following statutes: SB 375 and SB 32, the California Clean Air Act, Federal Clean Air Act Amendments and the FAST Act. SJCOG works closely with other Central Valley MPOs and the San Joaquin Valley Unified Air Pollution Control District.

Travel forecasts can provide data for decisions concerning transportation needs, air quality impacts, transit improvements, and land use. The model is an essential component of the Congestion Management Plan. The database is useful in developing many of the other work elements, and is indispensable in carrying out air quality analysis and determining the environmental and community issues to be addressed. It is also a tool often requested by local jurisdictions for technical assistance.

Collection and analysis of traffic data to monitor the existing network, establish trends and forecast future volumes, congestion levels and measures of effectiveness and performance.

Envision Tomorrow is a critical tool that was used to develop the Sustainable Communities Strategy land use in the RTP/SCS and involved analysis of future patterns of growth and development. Additionally, GIS-based analysis and products are being integrated by SJCOG as an essential element of many transportation planning projects monitoring, implementation of RTP/SCS, and related public outreach functions.

- C. Tasks:
1. Air Quality Conformity and Emissions Modeling. Prepare air quality analyses as needed. This includes: running EMFAC, ensuring timely implementation of all federal TCMs, interagency consultation on methods and assumptions used for conformity.
 2. Travel Model- Conformity. Update, maintain, and run travel model for

- conformity analyses.
3. Travel Model- Transportation Analysis. Perform model runs at the request of member agencies for transportation studies and projects.
 4. Participate in SIP Development updates for ozone and particulate matter, including interagency consultation.
 5. Collect traffic data and transit ridership as strategically needed for performance monitoring measures and HPMS. Supplement data collected as needed by other studies. Local jurisdictional data collected and aggregated to meet HPMS and CMP requirements.
 6. Perform transportation modeling analysis required to support update and implementation of Regional Transportation Impact Fee program. Also see WE 901.02 – Regional Transportation Impact Fee Program (RTIF). Modeling work related to the RTIF is charged under WE 901.02.
 7. Provide training and experience for expansion of staff modeling expertise.
 8. Conduct assessment of needed updates, as well as an assessment and recommendation for land-use scenario planning tools for SJCOG use in various planning studies, including the RTP.
 9. Perform project level PM 2.5 and the regional air quality analysis; and usher project through interagency consultation; SJCOG anticipates this activity to occur quarterly with regular (monthly) outreach to local agency partners to identify early the need for such analyses.
 10. Review Traffic Counts (and collection of locally available count data) for Highway Performance Monitoring System.
 11. Serve as the lead agency in the San Joaquin Valley for air quality planning and coordination of air quality conformity analysis, coordinating with the other seven MPO's.
 12. Serve as the lead agency in the valley to coordinate with the San Joaquin Valley Air Pollution Control District concerning SIP development, rulemaking and update of transportation control measures.
 13. Serve as the lead agency in the valley to coordinate the development of FTIP's coordinating with FHWA, FTA and the other seven MPO's.
 14. Oversee the contract for Valley-wide air quality planning and coordination services.
 15. Obtain consultant services to organize interagency consultation meetings, and to support SJCOG staff in its role as valley-wide air quality coordinator.

D. Products & Schedule:

1. Prepare air quality conformity determinations, model runs, and documentation for RTP and TIP amendments—Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
2. Documentation of comment on State Implementation Plan and other approved Valley Air District plans and rules to reflect the input and concerns of SJCOG and our member agencies – per Final Air District Plan Schedule.
3. Documentation of model runs to address member agency needs transportation projects and studies—Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.

4. Monitor best practices in Land-use scenario planning tools and implement new tools or tool updates as practical and needed.
5. Documentation describing Coordinate Valley-wide completion of updated air quality conformity analysis in conjunction with the other seven MPO's – as required by new air plans and FTIP activity –June 2022.
6. Documentation of input on SJVAPCD and completion of updated TCM's – June 2022.
7. Valleywide Household Travel Survey – June 2022.

E. Funding Sources:

FHWA PL	\$391,562.00 – Toll Credits 44,912.16
Local Transportation Authority MK PM	\$ 74,352.00
Valley MPO's	\$181,100.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$ 497,014.00	\$ 150,000.00

G. Staff Required: (person-months)

SJCOG
18.0

603.04 GOODS MOVEMENT PLANNING AND COORDINATION

- A. Previous Work: Prior work includes: administer the Caltrans Sustainable Transportation Grant for the Valleywide Goods Movement Sustainable Implementation Plan 2015 – 2017; participation in Valleywide Goods Movement Studies in FY 2010 – 2017; participation with MTC, SACOG, and AMBAG in Mega Region Goods Movement Study 2016-2018; work on the Valleywide Goods Movement Model; participation in the Tri-County Goods Movement Committee; prior Port of Stockton access improvement studies including the SR 4 Crosstown Freeway feasibility study completed in 2005; Goods Movement chapters in the 2007, 2011, 2014, and 2018 RTP; STAA Truck Access Analysis in 2008 - 2010; continuing operation of San Joaquin Goods Movement Task Force (ongoing) and a joint SACOG/SJCOG I-5/SR-99 STAA Truck Study.
- B. Purpose: To prepare goods movement related technical studies and analysis; to develop and compile related information and data; to coordinate related Goods Movement issues with local agencies, adjacent regions and the private sector; staff support to the San Joaquin Goods Movement Task Force; to develop preliminary plans and funding strategies for goods movement improvements; to increase the visibility of Goods Movement Issues at the policy and technical levels and to the public.
- C. Tasks:
1. Staff and coordinate the San Joaquin Goods Movement Task Force
 2. Identify operational gaps in the existing STAA Truck Routes system and propose solutions
 3. Participate in the Interregional Goods Movement Technical Working Group with Valley MPO Partners on Inter-Regional Goods Movement.
 4. Act as liaison with Goods Movement industry and the business community concerned with goods movement issues.
 5. Monitor and report on Trade Corridor and infrastructure projects.
 6. Review proposed new development to ensure adequate future STAA access where it is needed.
 7. Continued coordination with San Joaquin Valley MPOs in the development of a regional goods movement strategy to inform next transportation reauthorization bill or related legislative efforts.
 8. Complete SJCOG Truck Planning Study.
- D. Products & Schedule:
1. San Joaquin Goods Movement Task Force, agendas, meetings, and follow-up actions— Meet as needed.
 2. Meetings and correspondence to continue relationship with Northern California Trade Corridor Coalition – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
 3. Correspondence and technical memorandum proposing solutions to operational gaps on the STAA system – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
 4. Document strategies for STAA Truck Access and Routing Issues –

Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.

5. Communications to Increase and broaden relationships with private sector to partner on goods movement issues—Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
6. Potential Coordinated San Joaquin Valley Good's Movement Reauthorization/State and Federal Funding Strategy—June 2022.
7. Meetings and correspondence to coordinate policies, strategies, and projects in the San Joaquin Valley affecting goods movement through June 2022.
8. SJCOG Truck Planning Study – On-going throughout FY 2021/2022

E. Funding Sources:

Local Transportation Authority MK- PM \$ 83,543.00

F. Responsible Agency:

SJCOG:
\$ 83,543.00

G. Staff Required: (person months)

SJCOG:
2.0

701.01 ON-GOING TECHNICAL ASSISTANCE

- A. Previous Work: SJCOG provides considerable technical assistance of varied types to its member governments, including staff training in air quality, transit planning, transportation planning, and grant writing; One Voice® activities; and assistance working with monitoring agencies, on transportation grant applications and in resolving CTC fund vote issues for multiple agencies.
- B. Purpose: To provide assistance to SJCOG'S member governments which will aid them in their planning programs as well as provide them with a cost saving.
- C. Tasks: The following tasks could conceivably be requested of SJCOG but are not the full range of activities that can be provided.
1. Data generation, procurement and dissemination that are needed by member governments in preparing grant applications, developing specific studies, or local projects.
 2. Grant preparation assistance either in securing information on various grant programs, developing the grant information requirements, or preparing, submitting and following up on grant review and progress.
 3. Staff training of and assistance to local agencies in meeting federal requirements. This includes holding workshops and briefing sessions.
 4. Legislative assistance. This can include securing information on various pieces of legislation appearing before legislative committees, or working with legislators in preparing and developing specific pieces of legislation that would benefit the member governments; however, this is not engaging in lobbying activities.
 5. Provide information to State and Federal agencies on transportation policy issues, continue to monitor, evaluate and comment upon State and Federal legislation dealing with transportation that is of concern and importance to this region.
- D. Products & Schedule:
- Task 1 – Written material in the form of correspondence, technical memos, and e-mail communication -Provide on an on-going basis to support member agencies – through June 2022.
- Task 2 – Grant applications for funding – Operational Activities with Deliverables Reported on Quarterly Basis or as required through June 2022.
- Task 3 –Training sessions with partner agencies – Operational Activities with Deliverables Reported on Quarterly Basis or as needed through June 2022.
- Task 4 – Written material in the form of correspondence, technical memos, and e-mail communication that document the process through June 2022.
- Task 5--Review, track, and comments on relevant legislative proposals – Monthly through June 2022.
- E. Funding Sources:

Local Transportation Authority MK- PM	\$ 110,980.00
Local Planning Funds LTF COG	\$ 0.00

F. Responsible Agency: SJCOG
\$ 110,980.00

G. Staff Required: (person-months)
SJCOG
3.0

801.01 INTERGOVERNMENTAL COORDINATION

- A. Previous Work: This is the traditional heart of SJCOG's functions i.e., to coordinate planning functions with those of other jurisdictions. SJCOG has participated on a regular basis in the meetings of the California Committee of Regional Council Directors, Regional Transportation Planning Agencies, California Transportation Commission and California Council of Governments. SJCOG is consistently called upon to coordinate functions, and to explore new issues and techniques with agencies such as Caltrans, neighboring COGs, organizations with an interest in transportation such as Human Services and Federal funding agencies. Coordination with local jurisdictions on plans that have a great impact on transportation such as General Plans and Air Quality plans are essential to the success of our planning efforts. SJCOG coordinates the Washington, DC San Joaquin One Voice® in order to educate legislators and key administration officials of the activities of this region and the transportation needs and priorities of the area.
- B. Purpose: To assure that all regional activities of SJCOG are fully coordinated with those activities which relate to one another in the area surrounding San Joaquin County or are of mutual concern to other SJCOG'S in the area or the State. SJCOG will promote the interests of San Joaquin County through the retention of a Washington D.C. consultant.
- C. Tasks:
1. SJCOG will work with the Federal Highway Administration, Federal Transit Administration, Environmental Protection Agency, Caltrans and other state and federal agencies in implementing the planning process.
 2. SJCOG will regularly attend the COG Director's Association and Regional Transportation Planning Agency meetings and participate in the efforts of the California Council of Governments (***funded with LTF and not CPG***).
 3. Serve as a member of the Capitol Valley Service Authority for Freeway Emergencies Organization.
 4. SJCOG will participate with regional agencies throughout Federal Region IX, on issues of joint concern and benefit. Coordinate with local, state and national associations of managers, planners and others.
 5. Coordinate with Valley COG Directors and the San Joaquin Valley Air Pollution Control District Board.
 6. Retain Washington, DC based legislative consultant (with non-state and federal funds). This task does not utilize state or federal planning funds and is accounted for separately.
 7. Participate in San Joaquin Valley One Voice® Analysis and Program (***funded with LTF and not CPG***).
 8. Provide staff support, agenda items and agenda staff reports for the San Joaquin Valley Regional Policy Council. Share funding with valley MPO's for administrative support to operate the Policy Council. Attend San Joaquin Policy Council meetings quarterly.

9. Participate in the San Joaquin Valley Legislative Advisory Committee, including weekly/monthly meetings.
10. Participate in and support the activities of the Partnership for the San Joaquin Valley. Attend Board meetings.

D. Product & Schedule:

1. Correspondence with the Federal Highway Administration, Federal Transit Administration, Environmental Protection Agency, Caltrans and other state and federal agencies in implementing the planning process – Operational Activities with Deliverables Reported on Quarterly Basis.
2. Meeting attendance in the San Joaquin Regional Policy Council, participate in San Joaquin COG Directors' Association and Regional Transportation Planning Agency, and monthly and participate in the efforts of the California Council of Governments (***funded with LTF and not CPG***) – Periodically, Operational Activities with Deliverables Reported on Quarterly Basis.
3. Meeting attendance for the COG Director's Association and Regional Transportation Planning Agency meetings and participate in the efforts of the California Council of Governments - Monthly.
4. Meeting attendance and written communications with Association of Bay Area Governments, Metropolitan Transportation Commission, Sacramento Area Council of Governments, other Bay Area and mountain agencies on regional growth issues- to include coordination on assumptions for projections and forecasts (population, housing, jobs, and commuting) further identified in work element 801.02 - Operational Activities with Deliverables Reported on Quarterly Basis.
5. Meeting attendance to participate in the Capitol Valley Service Authority for Freeway Emergencies Organization – Quarterly meetings and reports.
6. Meeting attendance to participate with regional agencies throughout Federal Region IX, on issues of joint concern and benefit— Correspondence occurs through e-mail, phone, or meetings every two weeks on issues of joint concern.
7. Meeting attendance and communication to coordinate with local, state and national associations of managers, planners and others - Operational Activities with Deliverables Reported on Quarterly Basis.
8. Work products per contract with Washington legislative consultant (with non-state & federal funds) – Annual.
9. Work program of the San Joaquin Valley Policy Council – Operational Activities with Deliverables Reported on Quarterly Basis.
10. San Joaquin One Voice® Legislative Analysis and Legislative Program (***funded with LTF and not CPG***) – January 2022.
11. Meeting attendance for San Joaquin Valley Regional Policy Council meetings – quarterly.
12. Meeting attendance for the San Joaquin Valley Board and Transportation Workgroup – Operational Activities with Deliverables Reported on Quarterly Basis.

E. Funding Sources \$:

Local Transportation Funds (COG) -	\$ 48,453.00
Local Transportation Funds (CON) -	\$ 86,000.00
Fees	\$ 18,000.00
Local Transportation Authority – COG	\$ 169,135.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANTS</u>
\$ 235,588.00	\$86,000.00

G. Staff Required: (person-months)

SJCOG
13.0

801.012 REGIONAL LEADERSHIP ACADEMY RURAL PLANNING ASSISTANCE GRANT

A. Previous Work: SJCOG administered the Rural Assistance Planning Grant from FY 17/18 through FY 20/21. The grant was implemented by the California Association of Regional Councils (CALCOG). CALCOG developed and executed the design for a new program known as the California Academy for Regional Leaders (CARL). The inaugural class of 23 participants represented senior-level staff from 22 agencies statewide. Subsequent years have seen expansion in the make-up of class participants to include Caltrans and to expand beyond planning and programming staff to include other important leadership positions in participating agencies. Activities included:

- Retained program contractor to develop curriculum and program
- Retained subject-matter experts to advise on program design
- Developed case studies for policy awareness exercises
- Recruited program participants
- Identified and hired instructors
- Developed logistics plan
- Conducted six two-day training sessions for program participants at various locations statewide, including experts in communication, leadership skills, policy analysis, and career development.

B. Purpose: To administer the Regional Leadership Academy Rural Planning Assistance (RPA) Grant with the following overall objectives:

- Provide a training and leadership development program for high-potential regional agency employees that will:
 - Help regional agencies with staff development efforts and succession planning
 - Enhance leadership skills for participants
 - Help regional agencies retain talent
 - Increase connections and networks between participants and their agencies to improve information sharing

C. Tasks: Building on the program framework established for the inaugural year, this FY tasks will again include evaluation of program and curriculum design, obtaining consulting assistance, technical research and analysis, and grant contract fiscal management.

CARL Program

1. On-going program administration and quarterly reporting
2. Retain program contractor to evaluate and develop curriculum and program
3. Retain subject matter experts to advise on program design
4. Develop four site visits and/or case studies for policy awareness exercises
5. Recruit and Market Class to Participants
6. Identify and Hire Instructors
7. Develop logistics plan
8. Identify Lead Trainer/Facilitator

9. Set-up formal program alumni network – to include bi-annual workshop and networking opportunities.

D. Products & Schedule:

CARL Program

1. Retain and execute contract with experts on program evaluation/design and curriculum development – July 2021
2. List of 30 individual participants for classes, marketing plan/materials and schedule development – July 2021
3. Evaluate program design and execution – develop list of recommended changes – July to August 2021
4. Twelve-day curriculum plan, including program pre-requisites – August to September 2021
5. Policy awareness project or case study teaching modules – September 2021
6. List of leadership and technical training experts with agreements/contracts – On-going task August 2021 to March 2022
7. List of site locations, events, and required contracts/agreements for facilities – On-going task August 2021 to March 2022
8. Contract/agreements with trainers/facilitators – On-going task August 2021 to March 2022
9. Program administration and quarterly OWP reporting – On-going task July 2021 to June 2022
10. Six two-day participant training sessions from September 2021 to April 2022
11. Two one-day alumni group (CARLA) workshops/networking events September 2021 to April 2022

E. Funding Sources:

State Planning & Research Part 1 (FY 21/22):	\$50,000.00
In Kind Match	\$12,500.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CalCOG</u>
\$0.00	\$50,000.00

G. Staff Required: (person months)

SJCOG: 1.0

801.02 PROJECTIONS AND FORECASTS

A. Previous Work: In 1989, SJCOG began functioning as an affiliate data center within the California State Data Center Program. Among the joint objectives of the program are to expand the utility of Census Bureau data and to improve access to Census Bureau statistical resources. In this capacity, SJCOG is required to assist in the analysis of and dissemination of U.S. Census reports to member agencies and the general public. In order to make projections and forecasts, SJCOG maintains an extensive database with census information, and employment, housing, and population projections. SJCOG conducts community workshops to present Census information and produces various public information materials on Census data which SJCOG distributes to the community. Beginning in FY 07-08 SJCOG entered into a new relationship with the University of the Pacific - Center for Business and Policy Research (CBPR) to jointly produce materials related to Census research and forecasting. This relationship has continued and expanded over the intervening years and will continue to expand in the coming fiscal year. In previous years, major efforts under this work element have included a variety of Census Bureau staff led training sessions in conjunction with the Data Co-op, and San Joaquin Public Health Services. A set of population, household, and jobs forecasts for San Joaquin, Stanislaus, and Merced counties was completed in 2016 in collaboration with CBPR. A new set of forecasts for San Joaquin county was completed during FY 20-21 for use in the 2022 RTP/SCS effort. These data are also used in support of SJCOG's other internal planning functions.

In 2017, SJCOG began a speaker series program (also with the University of the Pacific Center for Business and Policy Research), These speaker events are held quarterly and feature robust discussions on regional issues in San Joaquin County. Previous topics have included:

- Regional Housing Affordability
- Healthy Communities
- Jobs & Economy (including the Economic Impacts of the Regional Transportation Plan).
- Emerging Transportation Technology
- Workforce Development
- Innovation in Housing Construction & Construction Jobs
- Co-sponsorship of the annual State of the Northern San Joaquin Valley conference.

B. Purpose: To provide demographic, economic and transportation data for internal modeling and analysis, and to provide a service to local governments, stakeholder groups, and the general public. This element identifies regional needs for a greater understanding of the social and economic forces shaping our area of California. This work element is responsive to the need for socio-economic data within the entire work program. The Census Data Center function is responsive to questions from the community to assist other agencies with data needs and as input to regional policy-makers. Forecasting is a tool to help policy makers reach informed decisions through careful analysis of socio-economic trends.

C. Tasks:

SJCOG will partner with the University of the Pacific CBPR to provide the following:

1. Develop workshops/seminars/brown bag meetings intended to educate businesses, schools and other public agencies on the variety of data available and its uses.
2. Using the most recent information available, create analytical reports, charts and summaries for SJCOG's "regional indicators" webpage.
3. Develop maps to visually display the characteristics of data products.
4. Updates to county-level population, housing, households, and jobs forecasts
5. Answer census inquiries and provide special reports and presentations.
6. Participate as requested by Census Bureau in small support projects and information sharing.
7. Economic analysis and modeling activities related to various SJCOG planning efforts (e.g. Regional Transportation Plan update, socio-economic modeling).

D. Products & Schedule:

1. Produce Census and Research Information – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
2. Analysis and dissemination of Federal Highway Administration Census Transportation Planning Products (CTPP) and other Census related data through multiple dissemination channels (website, social media, special publications, and presentations)- Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
3. Provide research and forecasting for special projects, events, and presentations – As Required with Deliverables Reported on a Quarterly Basis through June 2022.
4. Maintain data on website for information dissemination – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
5. Coordinate four demographic forums/workshops – Quarterly through June 2022.

E. Funding Source:

Local Transportation Funds – CON \$ 152,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$ 90,000.00	\$62,000.00

G. Staff Required:(person months)

SJCOG
2.0

801.03 AVIATION AND AIRPORT LAND USE PLANNING

- A. Previous Work: The most recent Airport Land Use Compatibility Plan (ALUCP) for the Stockton Metropolitan Airport was adopted in 2016. The San Joaquin County ALUCP was adopted in 2009 and included all other public access airports in the county. An administrative update of both ALUCP's was completed in early 2018. The fee structure was comprehensively updated in May 2019. Based on the ALUCP, SJCOG reviews and comments on planning and development proposals that fall within an airport's areas of influence.
- B. Purpose: To undertake all functions necessary to serve as the Airport Land Use Commission for San Joaquin County, as required by the State Aeronautics Act. To protect the safe and efficient operation of public use airports from conflicting land uses within the airports' spheres of influence. To coordinate closely with State and other Regional Transportation Planning Agencies in implementing the California Aviation System Plan.
- C. Tasks:
1. As the Airport Land Use Commission, SJCOG will continue to evaluate General Plan, zoning and Airport Master Plan amendments and updates, as well as development proposals within the Airport Area of Influence for consistency with the ALUCP.
 2. Continue coordinating the transportation planning process with member agencies and airport operators regarding maintaining consistency with the ALUCP.
 3. Complete assessment of ALUC implementation practices and update the fee program.
 4. Participate in and further the development of the California Airport Land Use Consortium (Cal-ALUC)
- D. Products & Schedule:
1. Land use matters, either publicly or privately sponsored, are reviewed and commented on to ensure consistency with the regionally adopted ALUCP. ALUCP consistency reviews also include, for example, General Plans, Specific Plans, and relevant amendments. July 2021 – June 2022
 2. Contact airport operators to determine if any Airport Master or Layout Plan updates, requiring amendments to the ALUCP, have been proposed or approved – Quarterly through June 2022.
 3. Coordinate the transportation planning process with airport operators regarding access to their operations during updates of transportation planning and programming documents such as FTIP, STIP, RTP, and RCMP. Such coordination includes discussion of the condition of access roads to the airports and any maintenance or repair issues. -Quarterly through June 2022.
- E. Funding Sources:

Local Transportation Fund – COG	\$ 23,000.00
Fee Revenue	\$ 60,000.00

F. Responsible Agency:
SJCOG
\$ 83,000.00

G. Staff Required: (person-months)
SJCOG
2.0

801.04 CONGESTION MANAGEMENT PROGRAM/SYSTEM

A. Previous Work: AB 471 (1989) provides for development of Congestion Management Programs for all urbanized counties in California. The Measure K Renewal Program Ordinance, approved in November 2006, includes goals and provisions for update of the CMP and a process to review and comment on local plans and development proposals. The FAST Act requires the establishment of a Congestion Management Process. During FY 17/18, SJCOG updated the program, adopted a revised Regional Congestion Management Plan, and developed and used the Federal Congestion Management Process as a component of the RTP/SCS updates. During FY 18/19, SJCOG completed the system monitoring and performance reports. During FY 19/20, SJCOG Board passed Resolution R-20-16 along with SJCOG working with our jurisdictions to “Opt Out” of State CMP. State CMP statutes, including goals set forth by current Measure K Renewal Program Ordinance, will no longer be applicable. During FY 20/21, SJCOG received enough support, via City Council-approved resolutions, to “Opt Out” of State CMP. SJCOG is updating the RCMP to abide by Federal Congestion Management Process requirements. Also, SJCOG must prepare for implementation of Senate Bill (SB) 743, which changes recommended performance metric from level of service (LOS) to vehicle miles traveled (VMT).

B. Purpose: To implement the requirements of the Federal Congestion Management Process and future Measure K Renewal Program. To consider introducing new performance measure(s) and/or information from a future Steering Committee. To implement a technically sound and achievable set of planning methods that monitor the transportation system. To demonstrate that all reasonable Transportation Demand Management (TDM) and Transportation System Management strategies have been employed to reduce VMT along regional roadways and highways.

C. Tasks:

- a. Follow a CMP process that addresses all suggestions and/or recommendations made as part of the federal certification review process and to ensure continued compliance with FHWA policy and guidance. In reference to 23 CFR 450.320 (6) (d) and (e). In addition, a CMP process may include suggestions from a future Steering Committee.
- b. Planning activities to demonstrate and ensure that all reasonable Transportation Demand Management (TDM) strategies have been employed to reduce VMT along regional roadways and highways.
- c. Collect data on CMP network and monitor system.
- d. Use of CMP process to identify transportation projects and programs that can be considered for inclusion in the next RTP.
- e. Continue to define and expand upon CMP’s performance measures and indicators.

- f. Continue to refine and develop applications for SJCOG’s use of the federal congestion management process and procedures as a component of the CMP update. Adhering to the Federal Congestion Management process, investigate and apply corridor level monitoring analysis to evaluate CMP system performance.
- g. Establish policies and framework that abides by SB 743.
- h. Research SB 743-related case studies & lawsuits.
- i. Continue holding SB 743 working group, as deemed necessary.

D. Products & Schedule:

- a. Technical memoranda or correspondence related to application of regional and roadway specific Transportation Demand Management strategies – Quarterly through June 2022.
- b. Monitoring Report that assesses the CMP network, providing information to jurisdictions – June 2022.
- c. Document requests and responses from each SB 743 working group meeting – As deemed necessary throughout year through June 2022.
- d. Technical memoranda or correspondence related to Federal Congestion Management process and procedures as part of the CMP update – June 2022.

E. Funding Source:

FHWA PL-	\$	0.00
Local Transportation Authority-MK PM	\$	156,607.00

F. Responsible Agency:

SJCOG
\$ 156,607.00

G. Staff Required: (person-months)

SJCOG:
5.5

801.05 REGIONAL PLANNING

- A. Previous Work: This work element is based on the “3Cs” in federal transportation law: continuing, cooperative and comprehensive. All modes of transportation, including pedestrian walkways and bicycle transportation facilities, among others, shall be considered [23 United States Code (USC), Section 134 and Title 49, USC, Section 3004]. Regional transportation planning involves forming collaborative relationships with stakeholders the development of a shared mobility vision, including improving the transition among modes in the multi-modal transportation system and incorporation of new transportation technologies. Other previous work efforts include:
- Established new process requirements and work plan to complete first RHNA update cycle under SB 375, SB 575 and new State RTP Guidelines (done in conjunction with related work in W.E. 601.01). The 2014-2023 RHNA plan was adopted by the SJCOG Board in August 2014 and approved by HCD in October 2014. (It is adopted every eight years.)
 - Ongoing engagement and coordination with other local and regional planning professionals through valley-wide initiatives. During FY 18-19, SJCOG began extensive work with local planning efforts and initiatives, including facilitation of the Neighborhood Transformation working group of the South Stockton Promise Zone initiative and participation on the Stockton Mayor’s Taskforce for Affordable and Workforce Housing.
 - Support for products of completed Blueprint Planning Process: Web-based Planners’ Toolkit, the IMPACS tool to analyze the fiscal impacts of various development types; a study on institutional barriers to smart growth; and the San Joaquin Valley Greenprint (open space/natural resources inventory and toolkit).
 - Monitored and remained informed of legislation and new requirements for member agency General Plan Housing Elements and the RHNA process; disseminated pertinent information to member agencies, SJCOG standing committees, and the SJCOG Board.
- B. Purpose: SJCOG recognizes that a well-informed decision-making process is critical in regional planning. To that end, this work element is to inform, to report, and to educate traditional governmental stakeholders/partners, general public and private sector on developing planning issues and policies or legislation that may affect the transportation planning and implementation process. This work element focuses on regionally significant planning efforts and collaborative relationships with traditional and non-traditional stakeholders. It represents a coordinated work effort to identify and to explore emerging planning issues and policies not explored in other work elements. This is done through meetings, presentations, phone conferences, and research/report development.

C. Tasks:

1. Coordinate with and assist local partner efforts in applying for grants through Federal, State, or non-profit programs to assist in smart growth, infill, or active transportation projects. Included is research of grant opportunities and dissemination of this information to various interest groups.
2. Examination of local general plans, updates of general plans, and specifically, housing and circulation elements with reports on potential relevance and impact to San Joaquin County region.
3. Monitor legislation and new technical requirements for affordable housing provision in member jurisdictions' Housing Elements and provide regular updates to SJCOG Board, standing committees and jurisdictional staff.
4. Sponsor technical workshops on regional planning and transportation and/or speak at workshops led by other agencies on these topics.
5. Through outreach efforts to traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e. Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders, identify regional planning topics and create materials to disperse information specific to those audiences.
6. Engage and participate with San Joaquin County Public Health and various public health stakeholder groups to promote integration of public health concerns in the transportation planning process and produce information for dissemination on the relationship with public health and regional planning.
7. Research and write issues papers on emerging planning issues (i.e. electric vehicles, driverless cars, impacts to regional transportation planning).
8. Participate and collaborate with partners on efforts to examine planning tools to improve regional planning analysis.

D. Products & Schedule:

1. Correspondence related to assistance to local partners in planning grants – As Needed, Deliverables will be reported on a quarterly basis.
2. Regional planning materials to disseminate and document outreach efforts and meetings with traditionally under-represented and under-served populations and their community Leaders-Operational Activities with Deliverables Reported on Quarterly Basis.
3. White papers or issues papers or staff reports on various regional planning/policy topics, involving stakeholders in development and issues identification – Operational Activities with Deliverables Reported on Quarterly Basis.
4. Written Public outreach information disseminated on various regional planning topics – Operational Activities with Deliverables Reported on Quarterly Basis.
5. Meeting attendance in forums, meetings that examine land use tool or other planning tools--Operational Activities with Deliverables Reported on

Quarterly Basis.

E. Funding Sources:

Local Transportation Funds COG	\$ 127,000.00
Fees/Interest	\$ 5,000.00

F. Responsible Agency:

SJCOG
\$ 132,000.00

G. Staff Required: (person-months)

SJCOG
2.0

801.06 VALLEY METROPOLITAN PLANNING ORGANIZATION COORDINATION

- A. Previous Work: The Valley COGs joined forces to undertake specific activities relating to transportation planning, programming, and air quality. Coordination between Stanislaus Area Association of Governments, Merced County Association of Governments, Kern Council of Governments, the Council of Fresno County Governments, Kings County Association of Governments, Tulare County Association of Governments, and Madera Association of Governments has been on-going for years. This coordination with other Valley MPOs and the San Joaquin Valley Unified Air Pollution Control District (SJVUAPCD) includes specific roles and responsibilities as described in a Memorandum of Understanding.
- B. Purpose: The need for Valleywide coordination became apparent through the requirements of the Federal Clean Air Act Amendments and California's Clean Air Act. As a result, the Valley Metropolitan Planning Organizations are developing future work items in tandem and sharing responsibilities for covering statewide and Valleywide issues on a coordinated basis.
- C. Tasks:
1. Coordinate emissions modeling for air quality conformity Valley-wide issues.
 2. Participate in Valley Transportation Control Measures Implementation.
 3. Participate in Valley Interagency Consultation Committee
 4. Participate in Statewide air quality conformity committee on an as needed basis.
 5. Coordinate the Valley MPOs on SB 375 Implementation.
 6. Participate in peer-to-peer review of Valley FTIP products.
 7. Manage the firm of Michael Sigala Coordination for San Joaquin Valley Director Meetings –Monthly
- D. Products & Schedule:
1. Documentation related to Valleywide Transportation/Air Quality Modeling Revision Process – Operational Activities with Deliverables Reported on Quarterly Basis.
 2. Meeting attendance and documented agendas of Valleywide Interagency Coordination Committee – Monthly.
 3. Valleywide Transportation Control Measure Implementation – Operational Activities with Deliverables Reported on Quarterly Basis.
 4. Meeting attendance and documented agendas of Valleywide Model Coordinating Committee – Monthly.
 5. Meeting attendance and documented agendas of Valley MPO Regional Planning Committee – Monthly.
 6. Written communication or correspondence documenting peer –to--peer FTIP reviews – as needed.
 7. Meeting attendance and documented agendas of Valley MPO SB 375 Implementation Committee – Monthly.
 8. Meeting attendance and documented agendas of Director's Meeting --
--Monthly

E. Funding Sources:
Local Transportation Funds - CON \$ 100,703.00

Responsible Agency:

F. SJCOG CONSULTANT
\$55,703.00 \$45,000.00

G. Staff Required: (person months)
10.0

801.09 HABITAT PLAN IMPLEMENTATION

- A. Previous Work: The purpose of this work element is to implement the San Joaquin County Multispecies Habitat Plan. The work element has concentrated on the issue of habitat preservation, protection of open space, management for threatened and endangered species protection. Habitat Plan: Acquired approximately 8,915 acres in easements.
- B. Purpose: As economic growth and species protection seek to find compatible ground, SJCOG steps in to develop a process that maximizes the best interests of both. Investments such as major public roadways must not deteriorate species habitat. Since 2001, SJCOG has been implementing a predictable, financially fair and effective Habitat Management Plan for the entire County of San Joaquin. In this manner, the program will be able to meet all applicable State and Federal laws, and assist to meet Environmental Protection Agency Section 404 requirements.
- C. Tasks:
1. To support implementation of the Habitat Management Plan for the entire region.
- D. Products & Schedule:
1. Regional Habitat Management Plan Implementation. –
Operational Activities with Deliverables Reported on Quarterly Basis.
- E. Funding Sources:
- | | |
|---------------------------|--------------|
| SJCOGI (Developer Fees) - | \$605,000.00 |
|---------------------------|--------------|
- F. Responsible Agency:
- SJCOG
\$ 605,000.00
- G. Staff Required: (person-months)
- SJCOG
18.0

901.01 IMPLEMENTING MEASURE K RESPONSIBILITIES

- A. Previous Work: The original Measure K was passed by San Joaquin County voters in 1990 for a 20-year term. The Measure K Expenditure Plan identifies the countywide transportation facility and service improvements, including highway, public transit, railroad grade crossing, passenger rail, and bicycle projects, to be delivered by a 1/2-cent sales tax in San Joaquin County dedicated for transportation purposes. The Expenditure Plan specifically defines the categorical allocations of the sales tax revenues by transportation mode or facility and identifies the individual projects and programs to be funded under each category.

In November 2006, the voters of San Joaquin County approved the renewal of the Measure K program, which expired in 2011. With the renewal, Measure K was extended for an additional 30 years through 2041. In 2020, SJCOG adopted an updated Strategic Plan for the Measure K Renewal that served as the basis for Measure K funds to be disbursed for specific projects identified in the Measure K Renewal Expenditure Plan, including the timing of disbursements of those funds, and the proportionate share or absolute value of the Measure K contribution to each project.

- B. Purpose: The implementation of Measure K (including the Measure K Renewal Program) is a direct mandate of the people of San Joaquin County to improve the quality of life through improving the transportation system in the County. The intent of the Measure K program includes leveraging other state and federal funds to deliver Measure K projects. The purpose of implementing Measure K responsibilities therefore includes securing other state and federal funds that can be leveraged with Measure K funds.

- C. Tasks:

1. Amendments as needed to the Measure K Renewal Strategic Plan.
2. Implement the integrated Measure K and Measure K Renewal Financial Plan.
3. Close out the Measure K Renewal Early Action Program.
4. Measure K Ordinance and Expenditure Plan annual amendment process.
5. Provide Project Sponsor assistance.
6. Perform program administration.
7. Pursue opportunities to leverage state and federal funds.
8. Review Measure K and Measure K Renewal Revenue Estimates.
9. Monitor Measure K project delivery, fund disbursements, and prepare periodic reports to committees and Board.

- D. Products & Schedule:

1. Implement and monitor existing Strategic Plan – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
2. Amendments as needed to Measure K Strategic Plan – June 2022.

3. Integrated Measure K and Measure K Renewal Financial Plan – Implementation Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
4. Amend Measure K Ordinance and Expenditure Plan – June 2022.
5. Meetings and correspondence for Project Sponsor Assistance Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
6. Program Administration – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
7. Communications and technical documents related to Leveraging state and federal funds – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
8. Measure K financial status report – June 2022.
9. Written communication and reporting for Project Delivery Monitoring – quarterly with periodic reports to the Board through June 2022.

E. Funding Sources:

Local Transportation Authority-MK (COG) -	\$ 118,752.00
Local Transportation Authority-MK (PM) -	\$ 160,000.00
Fees	\$ 5,500.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$ 248,252.00	\$36,000.00

G. Staff Required: (person months)

SJCOG
19

901.02 REGIONAL TRANSPORTATION IMPACT FEE (RTIF)

- A. Previous Work: A regional fee that can be equitably and comprehensively applied to fund regional projects was adopted by the SJCOG Board in 2005. SJCOG is responsible for implementing, administering, and monitoring the RTIF program. All jurisdictions adopted the program which was in full implementation by July 1, 2006. SJCOG now administers the program. During FY 2012 and 2017, 5-year updates of the RTIF program were conducted in accordance with the Mitigation Fee Act and were adopted by the SJCOG Board. During FY 20-21 SJCOG continued on-going implementation of the RTIF and prepared the Annual Report in fall 2020.
- B. Purpose: To levy a fee to mitigate the impacts the new development on the regional roadway system based on a legal nexus. The RTIF program generates funding for capital expenses for the portion of costs of regionally significant transportation projects that are attributable to the impacts of projected land use development.
- C. Tasks:
1. Administer RTIF Program. Receive reports from member jurisdictions on collection of fees. Prepare annual reports. Account for use of RTIF funds for designated regionally significant projects.
 2. Continue to provide training and assistance to partner agency staff (e.g., individual meetings/consultations, workshops, guidance manual).
 3. Respond to local jurisdictions and provide technical assistance to administer the RTIF.
 4. Conduct annual audit and account for third party costs.
 5. Revise the current Jobs Balancing Investment Fund program to encourage use of the funding and better support project implementation.
 6. Start work on the AB 1600 update of the RTIF program. Select a consultant for nexus study.
- D. Products & Schedule:
1. Administer the RTIF program and compete all reporting requirements – Quarterly through June 2022.
 2. Annual RTIF Report to SJCOG Board – November 2021.
 3. Meetings documenting training and assistance to partner agency staff - As required through June 2022.
 4. Prepare scope, schedule, and budget for AB 1600 Fee Update. Select a consultant for the nexus study and program update August 2021.

E. Funding Sources:

Local Transportation Authority–MK COG	\$ 148,024.00
Regional Transportation Impact Fee-	\$ 27,720.00
Fees	\$ 0.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$175,744.00	\$0.00

G. Staff Required: (person months)

SJCOG
3.5

901.03 MEASURE K RENEWAL SMART GROWTH INCENTIVE PROGRAM

- A. Previous Work: This program was established as part of the passage of the Measure K Renewal Program in November 2006. Program Policies were established as a part of the Measure K Renewal Strategic Plan. Specific Program procedures, financial program and application process were adopted by the SJCOG Board. First selection and allocation of Planning and Capital Projects occurred in FY 08-09. In 2012, SJCOG completed the Smart Growth and Transit Oriented Master Plan for San Joaquin County to further guide investments of the Measure K Renewal Smart Growth Incentive Program. In October 2017, a call for Smart Growth projects was disseminated and projects were approved for funding by SJCOG Board in early 2018.
- B. Purpose: To establish project operational details and to implement the Measure K Renewal Growth Incentive Program. To receive proposals, select and prepare cooperative agreements to implement projects eligible for both the capital and planning components of the program. To evaluate and identify opportunities to improve the program on a continual basis. To prepare studies related to the SMART Growth Program.
- C. Tasks:
1. Tasks involve project management of Smart Growth funded projects.
 2. Monitoring both development activities in the region, planning projects in the pipeline, and legislative/regulatory opportunities to advance Smart Growth in San Joaquin region.
 3. Participate in community or (state/federal) meetings, workshops, conferences as it relates to Smart Growth and implications to San Joaquin County.
- D. Products and Schedule:
1. Provide project management, oversight, and monitor of Measure K Renewal Smart Growth funded projects to ensure their project delivery are met – Operational Activities with Deliverables Reported on Quarterly Basis.
 2. Research documentation on state and federal policies and implications to Smart Growth program - Operational Activities with Deliverables Reported on Quarterly Basis.
- E. Funding Sources:
Local Transportation Authority-MK (PM) \$30,600.0
- F. Responsible Agency:
SJCOG
\$ 30,600.00

G. Staff Required: (person months)
SJCOG
1.0

1001.01 SJCOG OVERALL WORK PROGRAM ADMINISTRATION

- A. Previous Work: The administration of previous years' work programs includes hiring qualified staff and consultants, preparing and submitting closing reports for last fiscal year and quarterly reports in current FY, updating DBE plan, reviewing and updating 3C self-certification, adopting Overall Work Program and Annual Financial Plan, updating and amending OWP and Annual Financial Plan.
- B. Purpose: To provide the administrative guidance to implement, update, and develop SJCOG'S Overall Work Program and Annual Financial Plan.
- C. Tasks:
1. Carry out administrative support and general staff supervision that is required for the implementation of the work program, such as time sheet preparation, etc.
 2. Prepare and submit (at a minimum quarterly progress reports) and submit quarterly invoices to Caltrans.
 3. Annually update SJCOG'S Disadvantaged Business Enterprise Plan and goals for the fiscal year.
 4. Annually review and update SJCOG'S 3C Process Self Certification Evaluation.
 5. Review and evaluate the core responsibilities of the Overall Work Program
 6. Prepare, and adopt SJCOG'S Overall Work Program and budget in cooperation with member governments.
 7. Develop and submit OWP Amendments as needed
 8. Develop and submit RFR's to ensure expenditures are accurate, requested on a reimbursement basis, for eligible activities, for delivered products and completed in accordance with work elements in the OWP and Federal and State Requirements
 9. Develop Draft OWP for FY 2022/23
 10. Develop and submit year-end package
- D. Products & Schedule:
1. Implement Work Program - Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
 2. Quarterly reports and quarterly invoices – Quarterly through June 2022.
 3. An updated Disadvantaged Business Enterprise Plan and goal statement for the next fiscal year - October 2021
 4. Self-Certification Evaluation – March 2022
 5. An adopted Overall Work Program for FY 2022/23 - March 2022
 6. Amend and update Overall Work Program – OWP amendments vary but generally happen approximately 3 times a year.
 7. Year-end package submittal (due August 2021 per Regional Planning Handbook)

E. Funding Source:
Federal Highway Administration PL - \$ 0.00
Local Transportation Fund (COG) \$ 190,531.00

F. Responsible Agency: SJCOG
\$ 190,531.00

G. Staff Required: (person-months)
SJCOG
10.0

1001.02 TRANSPORTATION DEVELOPMENT ACT

- A. Previous Work: This task is an on-going function and involves the administration of Transportation Development Act Funds (Senate Bill 325), as well as State Transit Assistance Funds (Senate Bill 620) received for San Joaquin County.
- B. Purpose: Senate Bill 325 and Assembly Bill 620 gave extensive responsibilities to the Regional Transportation Planning Agencies for administering these funds. Local governments depend upon these funds and the proper administration of them for the continued operation of transit services and the continued maintenance of their road and street systems.
- C. Tasks:
1. Prepare an estimate of funds needed to administer the Local Transportation Fund and State Transit Assistance funds by the County Auditor and staff.
 2. Develop apportionments for Local Transportation Fund funds in accordance with Statute.
 3. Update SJCOG'S Rules and Regulations for administering the Local Transportation and State Transit Assistance Funds as a result of changes that may occur from new legislation or policy changes.
 4. Hold public hearings and make required findings on "Unmet Transportation Needs" that are reasonable to meet.
 5. Process claims for Transportation Development Act funds: a) Review claims for compliance with statutes, regulations and Regional Transportation Plan; b) Prepare staff reports and resolutions; c) Transmit allocation instructions to County Auditor consistent with section 6659 of the California Code of Regulations.
 6. Prepare Transportation Development Act Annual Report.
 7. Contract with an accounting firm to carry out in a timely fashion the annual financial and compliance audits (SJRTD: compliance audits only).
 8. Continue to maintain an in-house accounting of both Local Transportation Fund and State Transit Assistance Funds received and disbursed.
 9. SJCOG staff will continue to provide information to State agencies on Transportation Development Act policy issues and will continue to monitor, evaluate and comment upon State legislation dealing with the Transportation Development Act.
 10. Work with state and other RTPAs to develop rules and administrative guidelines to respond to new state legislation.
 11. Utilize community-based organizations to bring more people, particularly the underserved and under-represented, into the planning process.
- D. Product & Schedule:
1. Local Transportation Fund and State Transit Assistance Revenue Estimates and Apportionments - February 2022
 2. Updated SJCOG LTF/STA Rules and Regulations - February 2022

3. Unmet Transit Needs Findings - March 2022
4. Documented approval of Local Transportation Fund and State Transit Assistance Claims – Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
5. Local Transportation Fund and State Transit Assistance Annual Reports - October 2021
6. Annual financial and compliance audits of Transportation Development Act claimants, except (SJRTD, Compliance only) - October 2021 to January 2022
7. Up-to-date Financial Statements showing status of Local Transportation Fund and State Transit Assistance Funds - Operational Activities with Deliverables Reported on Quarterly Basis through June 2022.
8. Utilize community based organizations to bring more people, particularly the underserved and under-represented, into the Unmet Transit Needs process – through update completion in March 2022.

E. Funding Sources:

Local Transportation Fund – COG	\$285,913.00
Fees	\$ 1,500.00
Transportation Development Act -	\$290,000.00

F. Responsible Agency:

SJCOG
\$ 577,413.00

G. Staff Required: (person-months)

SJCOG
7.0

1001.03 COMMUNITY INVOLVEMENT PROGRAM

- A. Previous Work: This work element has and continues to educate, inform and provide engagement opportunities for the public on various programs and projects. Methods have included the Measure K annual report, news releases, multilingual newspapers and television media. Public input has been solicited through public hearings, community workshops and presentations. SJCOG maintains an interactive website as well social media sites, including Facebook, Instagram, Twitter, LinkedIn, YouTube and a free electronic subscription based notification system to alert the public on news and contract opportunities. A directory of Native Americans in San Joaquin County has been developed and the SJCOG mailing list expanded to include names of individuals and groups identified in that effort. SJCOG hosts public information presentations every year, including public ceremonies for major project milestones.
- B. Purpose: To keep the general public aware of SJCOG and its planning functions, and to encourage their support and participation. To assure that all planning efforts are reflective of the needs and desires of the general populace within the County. To ensure early and continuous involvement of key Federal, State and Local Resource Agencies and interest groups.

In accordance with the direction provided by the FAST Act, SJCOG'S efforts are to continue to ensure early involvement by the public, and Native American Tribal Governments - with particular focus on underrepresented groups under Environmental Justice provisions. The California Valley Miwok Tribe is the only federally-recognized Native American tribe in the SJCOG region. In San Joaquin specifically, they are considered a "landless" Tribe. Meaning, although they are federally recognized, they do not have land held in trust by the bureau of Indian Affairs (i.e. no reservation or rancheria). Also a critical effort is to ensure the early opportunity for resource agencies and other key environmental organizations to participate in development of the public outreach structure and to have an early and continuous opportunity for full involvement in all planning, programming and project efforts. In accordance with Title VI and Environmental Justice guidelines, the work element supports all other work element projects in coordinating outreach efforts to all underrepresented and underserved populations.

The SJCOG public involvement process is designed to provide timely information about transportation issues and processes to citizens, key participating resource agencies and other public partnering agencies, transportation agency employees, private sector transportation providers, and others affected by transportation plans, programs, and projects.

OVERVIEW

SJCOG uses a combination of committees, fully noticed public hearings, workshops, forums, surveys, publications, the Internet (www.sjco.org), public access television, early access to and consultation with resource agencies,

and focus groups to inform, gauge and respond to regional issues and public questions and concerns. Stakeholders and interested individuals are involved through the SJCOG's committees, direct mail, public hearings, public workshops and early outreach and consultation. Transportation plans and documents are circulated monthly to the committees for review and comment. These committees include:

- The Technical Advisory Committee which is comprised of staff from planning and public works departments, Caltrans, San Joaquin Regional Transit District, San Joaquin Regional Rail Commission, San Joaquin Valley Unified Air Pollution Control District, the Port of Stockton and the Stockton Metropolitan Airport;
- The Social Service Transportation Advisory Committee which is comprised of representatives of the elderly, disabled, and social services agencies that serve transit dependent persons;
- The Citizens Advisory Committee, which is comprised of citizens appointed by the SJCOG Board, to advise the Board on Measure K and other issues that come before SJCOG;
- Interagency Transit Committee, which is comprised of public transit agencies within the County;
- Goods Movement Task Force, which is comprised of local agencies, private sector rail, inter-modal and trucking businesses and other private sector representatives.

Also, SJCOG's monthly board agendas, packets and/or minutes are distributed to individuals, agencies and organizations affected by transportation plans, programs and projects. Among recipients: media representatives from English and Spanish language publications, non-profit organizations, private businesses, and local residents. SJCOG staff regularly reviews the mailing list to involve organizations that represent various segments of the general population, including ethnic, racial, elderly, disabled, and disadvantaged groups.

Services include:

- Conducting one-on-one interviews with residents and business owners;
- Organizing and administering public meetings and forums;
- Developing and organizing direct mail to community groups and residents, including ethnic, racial, elderly, disabled, and disadvantaged groups;
- And acting as project spokesperson to interact with the public, merchants, media, etc. to keep them informed about construction progress and to minimize impacts.

Environmental Justice Efforts

SJCOG has made significant strides to take into account the needs of those traditionally under served by transportation, such as low-income and minority households. SJCOG reaches low income and minority populations through its Social Services Technical Advisory Committee and its public outreach program which includes reporting on Board Actions, website news items, meeting agendas, and notices of public workshops and hearings. Through the San

Joaquin Regional Transit District, Dial-a-Ride transit service is made available to disabled residents to attend SJCOG Board and other public meetings.

Other specific efforts include:

Translation Services

Informational materials for SJCOG's projects and programs are regularly translated from English to Spanish. Other material such as RTP goals, policies, surveys, overview materials, are translated to Spanish and other languages as needed. Notices and COG related news stories regularly appear in Spanish language as well as English media.

Workshops

SJCOG regularly conducts public outreach workshops in conjunction with numerous of its program and planning efforts. These include targeted workshops for older, under- represented or Spanish speaking groups and organizations. Significant emphasis is dedicated to workshops during the development of the RTP/SCS.

Native American Outreach

SJCOG adopted a Tribal Outreach Process in FY 17/18. Within this process, SJCOG distributes information about its plans, and projects to Native American communities, organizations, groups and individuals. The adopted procedures can be found at: <http://www.sjcoq.org/PPP>.

Resource Agencies

SJCOG ensure key resources agencies are provided the opportunity to provide early input in the formation of planning studies, feasibility studies, and policy related documents. SJCOG also provides early and continuous consultation with key stakeholder agencies.

Title VI Policy

SJCOG does not exclude anyone from participation in or deny the benefit of, or otherwise subject to discrimination on the basis of race, color, sex, national origin, or physical handicap, for any program. SJCOG publicizes its Title VI policy in its brochure, Board Actions, and on its web site. When updating our master mailing list, SJCOG staff seeks out organizations that represent traditionally under-served groups in order to provide information on transportation plans and

projects. Also, SJCOG maintains a formalized Title VI Complaint Procedure, in the event that a group or person believes they have been subjected to discrimination in our public involvement process. SJCOG maintains a Title VI binder to document efforts to comply with Title VI.

C. Tasks:

1. Regular presentations before civic clubs and other similar type organizations. These presentations are either topic specific or project specific, tied to federally funded projects, plans or the RTP in which SJCOG is involved. (FHWA PL)
2. Issue news releases to the media related to FTIP and RTP (FHWA PL).
3. Update and offer a Public Officials Directory on an annual basis to assist local governments and the general public in locating and maintaining contact with their elected representatives.
4. Conduct and staff SJCOG'S appointed Citizens' Advisory Committee Meetings and discussion items related to RTP and FTIP (FHWA PL).
5. Prepare informational products on SJCOG activities that are directly tied to FTIP and RTP (FHWA PL).
6. Maintain Internet access to the public related to information on FTIP, RTP. (FHWA PL)
7. Provide Title VI support to all projects in the OWP and Measure K Strategic Plan. (FHWA PL)
8. Provide early consultation and continuous involvement of resource agencies in planning and feasibility studies. (FHWA PL)
9. Provide public involvement, including to targeted populations and organizations as part of development of plans and feasibility studies. Ensure outreach and communication plans for large studies that implement or are related to the FTIP and RTP. (FHWA PL)
10. Ensure usage of visualization techniques in all public outreach activities related to FTIP and RTP.

D. Products & Schedule:

1. Post news through Facebook, Twitter, Instagram, YouTube and Website.
2. Material for public presentations – Developed based on project need
3. Periodic news releases – Work products will be reported on a quarterly basis.
4. Develop agenda and hold Citizens Committee Meetings on specific items related to RTP and FTIP– Monthly
5. Written correspondence and communications to implement Public Information Plan – monthly activities through June 2022 (FHWA PL)
6. Written SJCOG materials specific to FTIP and RTP -Operational Activities with Deliverables Reported on Quarterly Basis.
7. Documented changes and written materials to maintain and update website, social media platforms for FTIP and RTP items – Weekly
8. Meetings and communications related to implementation of outreach and targeted groups as noted in the purpose and tasks, and appropriate resource agencies for all planning and feasibility studies. (FHWA PL)

E. Funding Sources:

Federal Highway Administration PL - \$ 0.00
 Local Transportation Authority-MK-COG \$ 130,050.00

- F. Responsible Agency:
SJCOG
\$ 130,050.00

- G. Staff Required: (person-months)
SJCOG
8.0

1101.01 TRANSPORTATION DEMAND MANAGEMENT (TDM) SERVICES

- A. Previous/Ongoing Work: SJCOG employs several programs in an effort to reduce travel demand of single occupancy vehicles. As the primary TDM program, Dibs (formerly Commute Connection) was established by SJCOG in 1983 to serve San Joaquin County, adding Stanislaus County in 1987 and Merced County in 2010 (also referred to as Tri-County). The goal of the program is to encourage commuters to consider a shift to an alternative mode by promoting smart travel options such as carpooling, vanpooling, transit, biking, walking and telecommuting. Various tools and services are provided to the community such as a ride-matching and trip planning system, emergency ride home, transit information, park and ride facilities & mapping and vanpool subsidies. Outreach and marketing services are provided directly to employers as well as the coordination of special events to increase engagement amongst all members of the community. Program staff also works with employers to implement San Joaquin Air Pollution Control District Rule 9410 which requires certain large employers to develop and implement an employee trip reduction program. For San Joaquin County specific, other TDM programs include the Bicycle, Pedestrian, Safe Routes to School Funding Program and Regional Master Plan, the Park and Ride Funding Program and Master Plan and the National Transit Database Vanpool Program. As a member of the Service Authority for Freeways and Expressways (SAFE), SJCOG serves as the liaison to the Sacramento Area Council of Governments to administer the 511 Traveler Information System and SAFE program.
- B. Purpose: To improve the efficiency of existing transportation facilities, reduce congestion and improve air quality. To ensure members of the public are informed, educated and are provided the tools and services necessary to make a change in behavior.
- C. Tasks:
1. Program Administration
 - a. Perform checks to the ride-matching/trip planning system to maintain data accuracy through telephone calls and emails at least on a weekly basis.
 - b. Assist commuters with ride-matching and trip planning services and act as an information resource and referral agent for transit services, park-and-ride lots, bicycle commuting and telecommuting and provide brochures and promotional material.
 - c. Continue implementation of MOU with the Metropolitan Transportation Commission (MTC) to utilize the commuter database to reach and market program services and benefits to commuters travelling into the Bay Area for work purposes.
 - d. Administer the Emergency Ride Home program and vanpool subsidies

- e. Coordinate with San Joaquin Regional Transit District and vanpool providers to collect and report vanpool data to the National Transit Database.
- f. Manage contracts with Stanislaus Council of Governments (StanCOG), Merced County Association of Governments (MCAG).
- g. Provide progress reports to StanCOG, MCAG, and Stakeholders at least quarterly or as mutually agreed upon by all parties.
- i. Attend annual Association for Commuter Transportation (ACT) conference
- j. Participate in training and educational opportunities to enhance skills and knowledge in marketing and the TDM industry
- k. Explore and implement if feasible, an employer and commuter incentive program
- l. Develop and issue a Request for Qualifications to solicit and partner with app-pooling vendors

2. Employer and Community Outreach

- a. Contact employers to provide technical assistance in identifying appropriate TDM strategies for development of worksite TDM programs.
- b. Conduct work site transportation functions to promote rideshare services and encourage commute alternatives among employees. This may include commute surveys, work site analyses, events, and workshops.
- c. Serve as a resource to employer's subject to San Joaquin Valley Air Pollution Control District Trip Reduction Rule 9410.
- d. Conduct presentations to employers and community organizations to promote and build awareness of program benefits and services.
- e. Provide various reports on environmental and cost benefits, commute patterns and commute activity to commuters and stakeholders
- f. Provide tools and services such as brochures, flyers, posters, preferred parking signs, ridematching system, Emergency Ride Home program and other promotional material to the community
- g. Evaluate grant, sponsorship and donation opportunities to enhance program incentives and events
- h. Work with local jurisdiction and agencies to examine and implement park and ride lot opportunities
- i. Implement employer recognition program

3. Marketing, Research and Promotions:

- a. Conduct annual survey of registered commuters
- b. Maintain and enhance program website and trip planning system
- c. Develop targeted material for outbound commuters, neighborhoods, residential developments and business parks
- d. Provide engagement opportunities for community by developing interactive programs such as videos, training and webinars.
- e. Promote benefits and services through website, social media, electronic methods, direct mail and special events
- f. Initiate stories, develop articles, press releases and respond to media requests
- g. Provide frequent updates on trends, news to commuters, employers,

- stakeholders and general public
- h. Plan and coordinate Bike to Work, Rideshare Week and other dibs events
- i. Develop and implement vanpool project for Merced County
- j. Develop marketing goals and plan and work with marketing agencies to implement (2020-2021)

4. Agency Coordination and Assistance

- a. Coordinate with Caltrans, other area MPOs, transit agencies, TDM agencies, San Joaquin Valley Air Pollution Control District, etc. regarding TDM strategies and operations.
- b. Work with SJVAPCD to implement Rule 9410 in the San Joaquin Valley
- c. Support efforts of the congestion management program as it relates to Transportation Demand Management.

5. Manage Measure K Park and Ride Program (San Joaquin)

- a. Administer Measure K Park and Ride Funding Program and associated cooperative agreements.
- b. Coordinate with Caltrans and other local partners to assess and develop additional Park and Ride lot facilities, including in conjunction with development proposals and transportation projects.
- c. Conduct park and ride lot survey and analyze results

6. SAFE/511 Travelers Information System

- a. Work with Sacramento Area Council of Governments to establish a marketing plan to promote 511 and roadside assistance
- b. Evaluate budget and update member agencies on status
 - b. Maintain communication with San Joaquin County SAFE Board Members
- c. Participate in statewide CalSAFE and Motorist Aid group and annual conferences

D. Products & Schedule:

1. Monthly NTD Reports (2021-2022)
2. Annual NTD and Audit Report (October 2021)
3. News e-blasts, social media posts monthly through June 2022.
4. Participation in ACT Conference (July/August 2021)
5. Bike Month Activities (May, 2021)
6. Rideshare Week Activities (October, 2021)
7. Videos, webinars, training – quarterly through June 2022.
8. SAFE budget and transfer agreement (June/July 2021)
9. Park and Ride Lot survey – December 2021)
10. dibs Quarterly Activity Report – Quarterly through June, 2022
11. Attend statewide CalSAFE Conference (October 2022)
12. Request for Qualifications (RFQ) by July 2021

E.	<u>Funding Sources:</u>	
	MCAAG	\$ 85,000.00
	CMAQ Stanislaus -	\$ 245,800.00
	CMAQ Merced -	\$ 75,000.00
	CMAQ -	\$ 2,425,209.00
	SAFE -	\$ 150,000.00
	Local Transportation Authority MK PM)	\$ 864,000.00

F. Responsible Agency:
SJCOG
\$ 3,845,009.00

G. Staff Required (Person Months)
SJCOG
48

1201.01 FREEWAY SERVICE PATROL

A. Previous Work: SJCOG began operating the Freeway Service Patrol on Interstate 205 in 1996 as a method to offset construction delays during the first phase of I-205 widening. In January, 2018 SJCOG implemented new service on State Route 120 in Manteca connecting through State Route 99 South to the city of Ripon as well as State Route 120 in Manteca connecting to Interstate 5 North to French Camp. In November, 2018 new service was also implemented on State Route 99 between Jahant Rd and Harney Lane. Currently the Freeway Service Patrol is operated as a congestion relief strategy with state funds. SAFE and Measure K funds are used to match state funding for the FSP.

B. Purpose: To operate the Freeway Service Patrol on I-205, I-5, SR 120 and SR 99 and other areas identified as areas in need.

C. Tasks:

1. Continue operating Freeway Service Patrol on all existing routes.
2. Manage FSP contracts with towing service provider and online activity tracking tool and process related invoices
3. Develop and present annual report to committees and Board
4. Evaluate potential with possible implementation to modify or add new routes

D. Products & Schedule:

1. Documentation on Provide Freeway Service Patrol provision on I-205, I-5, SR 120 and SR 99 (2020-2021)
2. FSP Online Tracker and website (through June 2022)
3. Contracts with towing service providers (through June 2022)
4. Annual Report (September 2022)

E. Funding Sources:

SB1 FSP	\$ 540,646.00
Caltrans FSP	\$ 646,122.00
Capital Valley SAFE	\$ 207,000.00

F. Responsible Agency:

SJCOG
\$ 1,393,768.00

G. Staff Required: (person-months)

SJCOG
3.0

1201.03 SJCOG INTERNSHIP PROGRAM

- A. Previous Work: The San Joaquin Council of Governments supports opportunities to bring in students or recent college graduates for hands-on work experience in regional transportation planning. Many interns that have completed SJCOG’s internship program have gone on to pursue planning careers in public agencies.
- B. Purpose: To offer internship opportunities to college student or college graduates looking for a part-time, entry level internship to gain exposure and experience in the regional transportation planning field. Interns work with regional planning professionals on various assignments. Primary emphasis in this year’s work program would be internships to support Regional Transportation Plan/Sustainable Communities Strategies implementation activities, technical assistance to the Federal Transportation Improvement Program as well as SB1 Planning Studies. These assignments will enable SJCOG to cost-effectively meet deliverables and work products scheduled in the Overall Work Program while providing a coaching/mentoring program for interns. As a part-time internship, compensation is on an hourly basis and without benefits.
- C. Tasks:
1. Assist in Federal Transportation Improvement Program implementation.
 2. Develop spreadsheets, tables, and charts as it relates to federal-aid project delivery and tracking.
 3. Assist in regional planning studies and research and SB1 studies.
 4. Provide technical review, analysis, and document write up as needed for RTP implementation activities.
 5. Create technical work products such as GIS maps, issues papers, and memorandum on regional planning and policy.
 6. OWP reporting activities.
- D. Products & Schedule:
1. Various technical assignments for RTP Implementation – through June 2022
 2. Maps, reports, memos, and technical assistance for SB 1 Planning Studies -- June 2022.
 3. White papers and research papers and related infographics/visualization items on planning issues – June 2022.
 4. Spreadsheets and programming tracking tools for federal-aid programs, ongoing and completed-- June 2022.
- E. Funding Sources:
- | | | |
|-----------------------------------|----|------------|
| Local Transportation Authority MK | \$ | 0.00 |
| Local Transportation Fund – COG | \$ | 126,000.00 |

F. Responsible Agency:
SJCOG
\$126,000.00

G. Staff Required: (person-months)
SJCOG
1.0

1301.01 PERFORMANCE-BASED PLANNING AND PROGRAMMING

- A. Previous Work: One of the Federal Emphasis Areas is Performance-based Planning and Programming (PBPP) which refers to the application of performance management to achieve desired performance outcomes for the multimodal transportation system. Starting in the 2018/19 year, SJCOG's federal and state transportation partners have asked that a separate work element be identified within the Overall Work Program. SJCOG applied performance-based planning and programming strategies during the development of its Regional Transportation Plan/Sustainable Communities Strategies (RTP/SCS). Specifically, SJCOG identified SCS performance metrics and then evaluated performance indicators among four distinct RTP scenarios. SJCOG employed, for the first time, a civic engagement tool called MetroQuest, to examine the differences in performance outcomes between the four multimodal transportation system alternatives. The SJCOG Board unanimously approved one scenario as the underlying framework for the 2018 RTP after an extensive public outreach process. Some other work products in the past have included the Congestion Management Process, Congestion Mitigation and Air Quality (CMAQ) Program Call for Projects, and programming documents including the Federal Transportation Improvement Program and the State Transportation Improvement Program.

SJCOG has participated in MPO and State Agency workshops on Performance-Based Planning and is an active participant in the Technical Advisory Group (TAG) for PM3 – System Reliability, Freight and CMAQ. SJCOG has incorporated the adopted statewide PM1 (safety), PM2 (transportation asset management), and PM3 performance measures and targets into the 2018 RTP/SCS. To prepare for and begin implementation of PM3, SJCOG included a congestion level and travel time reliability analysis in the 2018 RTP/SCS. This analysis supports both the existing condition and needs assessment component for PM3, as well as SJCOG's Regional Congestion Management Program. It will form the basis of SJCOG's future work in this area.

- B. Purpose: To articulate a performance-based planning and programming framework that provides for a greater level of transparency and accountability, improved project decision-making, and more efficient investment of State and Federal transportation funds. To implement effective practices in the use of performance information to guide collaborative decision-making among SJCOG partners, member agencies, public, and Board.

To document examples of performance-based provisions including collecting performance data, selecting and reporting performance targets for the San Joaquin metropolitan planning area, and reporting actual system performance related to those targets on an annual basis. To ensure strong engagement of stakeholders and identify any key challenges and opportunities to this planning and prioritization process.

C. Tasks:

1. Participate in training, workshops, meetings & related PBPP activities.
2. Engagement with SJCOG partners, public, and various committees on PBPP information.
3. Coordinate with Caltrans, FTA, and transit operators to discuss how to link public transportation investment priorities to the achievement of performance targets in the areas of Transit Asset Management and Transit Safety.
4. Coordinate with Caltrans, FHWA, and SJCOG member agencies to discuss how to link roadway transportation investment priorities to the achievement of performance targets in the following areas: Highway Safety; Highway Pavement and Bridge Conditions, System Performance – National Highway System (NHS) Congestion; System Performance – Freight; System Performance – Congestion Management and Air Quality (CMAQ) Program.
5. Evaluate the effectiveness of the RTP and FTIP in meeting the goals of the federal transportation Performance Measures (PM); specifically, PM 1 (highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program).
6. Prepare a report compiling regional performance measure data and system performance.
7. Research ways of improving PBPP efforts.

D. Products & Schedule:

1. Report performance metric targets, as defined by Caltrans – June 2022.
2. Analyze and report on performance metrics, as defined by Caltrans – June 2022.
3. Memorandum or plan reporting on PBPP efforts, as deemed necessary.

E. Funding Sources:

Federal Highway Administration PL -	\$	0.00
Local Transportation Authority-PM	\$	104,000.00

F. Responsible Agency:

SJCOG
\$104,000.00

G. Staff Required: (person-months)

SJCOG
3.0

1350.01 Regional Early Action Planning Program (REAP).

A. Previous Work: New Work Element in late FY20/21.

- Completed Work Products: Final REAP Guidelines – February 2021
- Local agency application window – February 2021 – June 2021
- Administration of regional sub-allocations – February – June 2021

B. Purpose: The REAP program provides one-time funding made available from the California Department of Housing and Community Development (HCD) to support housing planning at the local level. It is the first time that housing planning dollars have been made available to regional entities, such as SJCOG. Funds should be used to plan and accelerate housing production throughout the region.

C. Tasks:

Regional Activities:

1. REAP Grant Administration
2. RHNA Process
3. Regional Housing Trust Fund Planning and Development
4. Regional Planning, Coordination, and Technical Assistance

Local Activities:

REAP funds will also be sub-allocated to local agencies by formula for eligible activities. Eligible activities must be related to housing planning and facilitate the acceleration of housing production. Eligible activities are outlined in SJCOG REAP Grant Guidelines.

D. Products & Schedule:

1. Administration and Grant Coordination – through June 2022 (will carry forward to future fiscal years through December 2023)
2. RHNA Process – through June 2022 (will carry forward to future fiscal years through December 2022)
3. Regional Housing Trust Fund – through June 2022 (will carry forward to future fiscal years through December 2023)
4. Regional Coordination, Regional Planning, and Technical Assistance – through June 2022 (will carry forward to future fiscal years through December 2023)
6. Invoicing and progress reporting quarterly – through June 2022 (will continue into future fiscal years through December 2023)

E. Funding Sources (000):

California Department of Housing and Community Development, Initial Allocation (via Fresno COG) FY 20/21	\$845,097.00
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F. Responsible Agency: \$ (000)

SJCOG
\$ 845,097.00

G. Staff Required: (person months)

SJCOG
1

1375.01 Sustainable Transportation Equity Program (STEP).

A. Previous Work: New Work Element in late FY20/21.

B. Purpose: The Sustainable Transportation Equity Program (STEP) is a competitive grant awarded to SJCOG in FY 20/21 by the California Air Resources Board. This is a multi-year grant that encompasses seven sub-grantees, multiple sub-contractors, and numerous community partners. The grant will fund a bundle of clean transportation projects and supportive programs to serve the needs of disadvantaged communities in the region, primarily located in Stockton. The funded projects include: (1) community engagement, (2) EZHub and Vamos application service enhancements, (3) electric car sharing, (4) electric bike sharing, (5) e-workforce development program, (6) shared mobility ridership incentives.

C. Tasks:

Task 0 Project Administration, Coordination, Communication and Outreach, Evaluation and Data Collection

Task 0.1 Project Administration: The Grantee and Sub-grantees will administer the various tasks of the project including participation in meetings with CARB staff; development and implementation of project plans; record-keeping procedures; reporting procedures; financial tracking and disbursements. Project administration includes grant agreement execution, quarterly meetings with CARB, quarterly reports on the progress of the projects and disbursement requests.

Meetings and communications with CARB staff

0.1.1. Initial Project Kick-Off meeting: The Grantee and Sub-grantees, in collaboration with CARB's Project Liaison, will plan, conduct and attend an initial meeting with CARB staff (either in person or online) following execution of the grant agreement. Topics for discussion may include, but not be limited to, the following:

- Project tasks, timelines, and milestones
- Project design, outreach and education activities
- Content and format for disbursement requests, quarterly reports and final report
- Press and public information request procedures
- Schedule for ongoing coordination meetings
- Other items as necessary

0.1.2 Ongoing Project Coordination: Ongoing Grantee coordination and review meetings with the CARB Project Liaison to discuss project status held at least quarterly. A final meeting, or conference call pending CARB Project Liaison approval held at the conclusion of the project. The Grantee and Sub-grantees will participate in meetings with CARB staff. Additional meetings may be scheduled at the discretion of the CARB Project Liaison. Meetings will be conducted by phone, unless otherwise specified, by the CARB Project Liaison. Project coordination and review meetings are the responsibility of the Grantee and should contain:

- Agenda for the meeting with conference call (or online-platform) information
- Discussion of project tasks, timelines, deliverables, milestones

- Any difficulties encountered since the last project update
- Concerns or questions requiring resolution from CARB
- Notification of any pending disbursement requests
- Scheduling the next project coordination meeting

Task 0.2 Coordination with other CARB projects (e.g., Access Clean California, Clean Mobility Options Voucher Pilot) where appropriate and as requested by CARB.

Task 0.3 Project Partnerships

Coordinate with all project partners, including Sub-grantees and Community Partners, following the decision-making structure and the governance, legal, and financial relationships set out in the Partnership Structure. This must include:

- Regular communication with all Sub-grantees, such as check-ins to keep track of progress made and troubleshoot issues encountered. The Grantee is responsible for keeping CARB informed of progress on all projects, including those that are being led by one of the Sub-grantees.
- Regular communication with all Community Partners in a mutually agreed-upon format to share progress and receive feedback on project implementation and design
- Accessible public meetings to share progress and receive feedback on project implementation and design
- Updates to Community Partners and other community stakeholders on how their feedback is being incorporated into the design and implementation of the project
- Incentivize participation of all project partners, including Community Partners, appropriately

Task 0.4 Community Engagement: Directly and actively engage community residents during project implementation to ensure that project design and implementation meet the needs of the residents. The Grantee must:

- Ensure that funded activities focus on engaging community residents located or involved in the STEP Community.
- Use community engagement methods recommended in the Community Inclusion Guidance.
- Develop and implement a plan and process for community engagement that maximizes the power of community residents to make decisions about project design and implementation.
- Ensure that all community engagement plans have been approved by CARB prior to implementation, either as a separate plan or as part of a progress report.
- Conduct community engagement activities that help maximize residents' ability to participate, such as translating meetings and materials and scheduling meetings at times that are convenient to community residents.
- Focus on engaging hard-to-reach residents whose interests have historically been under-represented.
- Ensure that funded activities collect data on residents' current knowledge regarding clean transportation options.
- Ensure funded activities include an evaluation of the success of the activities throughout implementation and adapt methods used accordingly.
- Incentivize community residents appropriately for their time and expertise during

their participation in community engagement activities.

Task 0.5 Outreach and Education: Conduct outreach and education with community residents to help ensure that identified end users in the community have the knowledge necessary to use new transportation services and to inform their participation in decision-making processes. The Grantee must:

- Ensure that funded activities focus on reaching out to or educating community residents located or involved in the STEP Community.
- Use outreach and education methods recommended in the Community Inclusion Guidance.
- Develop plans for outreach and education activities, either as a separate plan or as part of a progress report.
- Conduct outreach and education activities that meet the needs of the residents, such as translating materials and creating events at times that are convenient to community residents.
- Ensure that funded activities collect data on residents' current knowledge regarding clean transportation options.
- Ensure funded activities include an evaluation of the success of the activities throughout implementation and adapt methods used accordingly.
- Educate community residents about other applicable CARB funding opportunities, including Access Clean California and the clean vehicle ownership programs (e.g., CVRP, Clean Cars 4 All, CVAP), and supporting California Energy Commission funding opportunities (e.g., the California Electric Vehicle Infrastructure Project).
- Ensure all outreach and education plans and press materials have been approved by CARB and adhere to the California Climate Investments guidelines, as identified in Exhibit A, Section B of this Grant Agreement prior to implementation.

Task 0.6 Develop policies and procedures manuals.

Such documents and process flow charts should describe the Grantee's administrative actions for evaluating and processing project participants, tracking vehicle maintenance for all project vehicles, and data gathering and reporting for all aspects of the project. Examples include, but are not limited to:

- Organizational charts
- Details on how key project processes are conducted and how associated documentation of data, signatures, and authorizations are gathered and recorded, including, but not limited to:
 - Community engagement, outreach, and education
 - Participant information, enrollment, and tracking
 - Vehicle reservations, tracking, and maintenance
 - Data collection and reporting
- Develop and maintain accounting procedures to track expenditures by:
 - Grant Agreement number
 - Fiscal year
 - Funding source
- Provisions to protect against conflict of interest
- Provisions to protect against fraud, and to identify, respond to, and report if fraud has occurred

- Provisions to protect personally identifiable information

Task 0.7 Project Records

As defined in Exhibit A, Section K of this Grant Agreement, establish and maintain records on, but not limited to, participants, vehicles, Electric Vehicle Supply Equipment (EVSE), fuel, and maintenance as follows:

0.7.1. Identify participant data that are confidential and develop measures to keep these data confidential. For example, residential addresses must be kept confidential.

0.7.2. Record the physical address and census tracts of each location that project vehicles are domiciled or operated within and each location EVSE is installed.

0.7.3. Develop a systematic process and schedule to back up database(s) on a daily basis at a minimum.

0.7.4. Develop and enforce security measures to safeguard project database(s).

0.7.5. Store all records in a secured and safe storage facility that maintains confidentiality and provides fire and natural disaster protection.

0.7.6. Retain files during the term of the Grant Agreement plus three years after the grant term expires.

0.7.7. Transfer all project records to CARB once the project ends or three years after the grant term expires, whichever comes first.

Task 0.8 Document and track expenditures, as defined in Exhibit A, Section G of this Grant Agreement.

Task 0.9 Fulfill any needed CEQA requirements.

Task 0.10 Reporting and Documenting Expenditure of the State Funds

As defined in Exhibit A, Section I of this Grant Agreement, report on and assess progress throughout project implementation via participant and project metrics, Status Reports, and the Final Report, as follows:

0.10.1. Develop plans for the collection of data and carry out those plans using appropriate metrics and tools. Ensure that all data collection plans have been approved by CARB. Metrics should include information about transportation modes used and trips taken by community residents before and after the project's implementation. CARB will coordinate with the Grantee to identify parameters and determine the most effective mechanism for obtaining information and measures to safeguard confidential individual information. At a minimum, participant metrics should be collected prior to launch of a new project, midway through a project, and at the end for Final Report reporting.

0.10.2. For all projects, the Grantee will track and report metrics, such as, but not limited to, the information outlined in Appendix H of this Grant Solicitation. The Grantee must track and report this data at least quarterly.

0.10.3. Participate in third-party research projects as requested by CARB.

0.10.4. Status Reports: The Grantee will submit numbered status reports accompanying grant disbursement requests to CARB at least quarterly, but may submit on a monthly basis if necessary to justify more frequent disbursements with prior approval from CARB. These reports must be approved by CARB and must contain at minimum, in either Microsoft Word or PDF as a single electronic file, the information outlined in Section I of this Grant Agreement.

0.10.5. Final Report: The Final Report must be submitted within 90 days of program

completion or by March 31, 2025, whichever comes first. A draft Final Report is due to CARB by January 31, 2025. Final reports must contain at minimum the information outlined in Section I of this Grant Agreement.

Task 0.11. The Grantee may add additional projects with the approval of CARB. Any additions will incorporate community decision-making. The Grantee must show that each project will:

- Meet applicable State laws
- Meet STEP's objectives, including:
- Address a community-identified transportation need
- Support increasing access to key destinations
- Facilitate or achieve GHG emission reductions
- Meet all requirements specified in Appendix E of the Grant Solicitation
- Meet applicable requirements of statutes; applicable State law; the FY 2019-20 Funding Plan; the FY 2019-20 STEP Implementation Grant Solicitation; this Grant Agreement; and all Attachments, Exhibits, and Appendices to this Grant Agreement. The FY 2019-20 Funding Plan for Clean Transportation Incentives is available at: <https://ww2.arb.ca.gov/sites/default/files/2019-09/fy1920fundingplan.pdf>.

Task 1 Community Engagement (Project #1)

The community engagement project includes a combination of strategies to significantly increase the representation of disadvantaged community residents in the process and amplify the capacity of community-based organizations. Building on the comprehensive network, the community development subproject (1a) will engage the transport-disadvantaged residents in the design and implementation of the clean transportation projects, which will include specification of goals, service features, evaluation criteria, and cost, supply, and location requirements. Transport providers and researchers will respond to the community's needs throughout the project period through an interactive process that treats each partner equally and promotes the understanding that leads to mutual agreements. The education and outreach subproject (1b) will consult the community on how best to communicate and train transport disadvantaged residents to use the service. Outreach and education will include the development of training materials, that may include brochures, videos, and presentations, and identifying and training individuals who can assist individuals who may need assistance using the new services (i.e., a "train the trainer" program).

Building and maintaining trust with the community is vital to project success. As a cornerstone of this project, we seek to foster continual trust-building through activities that will include:

- Facilitating engagement activities to explicitly share what feedback is being sought, what will be done with their feedback, what the next steps are, why the engagement is important and how it will impact residents. The engagement team will conduct follow up with participants as appropriate or needed.
- Training project partners about the historical context of the project area and the value of working with CBOs that have been working with the community and have built relationships and trust with the community; and
- Requesting that project partners be present at and participate in engagement activities

to strengthen the feedback loop and demonstrate to participants that the implementation team is hearing their feedback, and, in turn, the project implementation team can provide direct answers to participant questions and clear expectations of how feedback will be used and next steps.

Task 1.1 Community Engagement Project Administration

- 1.1.1 Kick-off Meeting
- 1.1.2 Execute Subcontract
- 1.1.3 Quarterly partner meetings
- 1.1.4 Quarterly reports
- 1.1.5 Project management/invoicing

Task 1.2 Develop Community Landscape

- 1.2.1 Assess what relationships with community-based organizations exist through the city and other project partners.
- 1.2.2 Identify gaps, evaluate if existing relationships align with community demographics, and which segments of the community are not represented.
- 1.2.3 Identify and reach out to CBOs that represent groups missing from the landscape.
- 1.2.4 Develop, maintain and manage relationships with CBOs.

Task 1.3 Align Engagement from Prior and Current Planning Efforts

- 1.3.1 Create a contact database of community-based organizations, project leads, and community members engaged in TCC planning/implementation grants, 617 steering committee and other state funded planning activities.
- 1.3.2 Through interviews with state and local transit agencies, identify stakeholder and residents most likely to need/use increased transportation options, with a particular emphasis on hard-to-reach residents.
- 1.3.3 Through interviews with CBOs, identify stakeholder and residents most likely to need/use increased transportation options, with a particular emphasis on hard-to-reach residents.
- 1.3.4 Create and convene a community engagement working team. The working group will include community engagement partners, STEP program manager, community partners and two seats for community members/residents.
- 1.3.5 Create and implement an incentive structure for engagement.
- 1.3.6 Hold an Annual Summit for stakeholders to share data about project progress, identify adjustments needed and celebrate milestones and success.
- 1.3.7 Create a peer learning network to share information and provide a forum for training and discussion.

Task 1.4 Education and Outreach

- 1.4.1 Continually assess community needs through focus groups and listening sessions.
- 1.4.2 Work with project partners and community based-organizations to develop and refine messaging and education materials that are culturally competent and specific to community needs. Includes ensuring appropriate translation and interpretation.
- 1.4.3 Through emails and phone calls, engage local health professionals and other stakeholders in developing messaging that ties health and safety to clean transportation and mobility options.
- 1.4.4 Identify where target populations get information (social media, ethnic media, CBOs

lists and newsletters, etc.) and target those channels for distributions of outreach and educational materials.

1.4.5 Develop and maintain a one-stop shop on SJCOGs website where residents, local businesses and other stakeholders can find project updates, key milestones, engagement opportunities.

1.4.6 Create and distribute an e-newsletter to share engagement opportunities, project updates and other information with stakeholders, residents and other interested parties

1.4.7 Develop and share “success story” videos to put a human face on the project and encourage use and continued feedback.

1.4.8 Host educational events at the kick off of the project and key project milestones to share updates and information on how to use the new transportation options. These events will take into consideration scheduling needs and ease of access to target populations and will provide incentives.

Task 1.5 Project Specific Outreach Efforts

1.5.1 Vamos Specific Engagement Coordination

On-going coordination between Community Engagement (Project #1) and Vamos MaaS Project (Project #2). Develop a summary of any refinements/adjustments needed to project specific community engagement (See also Tasks 1.6.3 – 1.6.5).

1.5.2 MioCar Specific Engagement Coordination

On-going coordination between Community Engagement (Project #1) and E-carsharing Project (Project #3). Develop a summary of any refinements/adjustments needed to project specific community engagement (See also Tasks 1.6.6 – 1.6.9).

1.5.3 EBike Specific Engagement Coordination

On-going coordination between Community Engagement (Project #1) and E-bikesharing Project (Project #4). Develop a summary of any refinements/adjustments needed to project specific community engagement (See also Tasks 1.6.10 – 1.6.14).

1.5.4 Workforce Specific Engagement Coordination

On-going coordination between Community Engagement (Project #1) and E-workforce Development Project (Project #5). Develop a summary of any refinements/adjustments needed to project specific community engagement (See also Tasks 1.6.15 – 1.6.17).

Task 1.6 Feedback and Continued Engagement

1.6.1 Create “how-to” videos to share on the webpage.

1.6.2 Develop “Environmental Justice in Active Transportation” marketing flyers for the “Teach in”.

1.6.3. Conduct Feedback and Continued Engagement for Vamos MaaS Project

1.6.4 Community meetings and workshops to discuss user interface changes to the new features in Vamos. Activities include the development of visual mock-ups of planned user interfaces, discussion of best methods of providing informational “how to” materials and inviting participant feedback on improvements and refinements to the new features in Vamos.

1.6.5 Develop educational materials on the use of Vamos (translated in all languages spoken in the City of Stockton), including how to use Vamos to order different service and different languages in the app (e.g., brochures, posters, powerpoints, and youtube videos).

1.6.6 Conduct end user training and “train the trainer” outreach by identifying and contacting individuals who help people who lack access to transportation (for example, coordinators

at senior centers, group homes, low income housing, health clinics, churches, and other organizations). Make changes to 1.6.4 based on feedback from training sessions.

Conduct Feedback and Continued Engagement for E-Carsharing Project

1.6.7 Community meetings and workshops to discuss user interface separate and in relation to VAMOS MaaS. Activities include the development of visual mock-ups of planned user interfaces, discussion of best methods of providing informational "how to" materials and inviting participant feedback on improvements and refinements to the new features in Vamos.

1.6.8 Develop marketing flyers to promote use of the system during mobility demonstrations.

1.6.9 Develop educational materials on the use of Miocar (translated in all languages spoken in the City of Stockton), including how to use Vamos to order different service and access to different languages in the app (e.g., brochures, posters, powerpoints, and youtube videos).

1.6.10 Conduct "train the trainer" outreach by identifying and contacting individuals who help people who lack access to transportation (for example, coordinators at senior centers, group homes, low income housing, health clinics, churches, and other organizations). Make changes to task 1.6.8 based on feedback from training sessions.

1.6.11. Conduct Feedback and Continued Engagement for E-Bikesharing Project

1.6.12 Conduct community meetings and workshops to discuss user interface separate and in relation to VAMOS MaaS. Activities include the development of visual mock-ups of planned user interfaces, discussion of best methods of providing informational "how to" materials and inviting participant feedback on improvements and refinements to the new features in Vamos.

1.6.13 Develop marketing flyers for use at Pop-up Events to promote use of the E-Bikeshare system during mobility demonstrations.

1.6.14 Develop educational materials on the use of bikeshare system (translated in all languages spoken in the City of Stockton), including how to use Vamos to order different service and different languages in the app (e.g., brochures, posters, powerpoints, and youtube videos).

1.6.15 Recruit ambassadors for outreach by identifying and contacting individuals who help people who lack access to transportation and for whom bikeshare may be a viable option. Make changes to Task 1.6.12 based on feedback from training sessions.

1.6.16 Conduct end user training and "train the trainer" outreach by identifying and contacting individuals who help people who lack access to transportation (for example, coordinators at senior centers, group homes, low income housing, health clinics, churches, and other organizations). Make changes to 1.6.13 based on feedback from training sessions.

1.6.16 Conduct Feedback and Continued Engagement for E-Workforce Development

1.6.17 Develop marketing flyers for "Environmental Justice in Workforce Development" for "Teach In".

1.6.18 Develop educational materials on the Workforce Development Program to attract and recruit participants.

1.6.19 Conduct end user training and "train the trainer" outreach by identifying and contacting individuals who help people find career opportunities (for example, workforce development centers, career resource centers, community centers, etc.). Make changes to

1.6.18 based on feedback from training sessions.

Task 1.7 Evaluation and Modifications

1.7.1 Produce a report on the integration of project specific data to inform modifications and refinement of public education and outreach efforts

1.7.2 Produce a report on communications analytics through webpages, social media and newsletters

Task 1.8 Data Collection

1.8.1 Collect data about engagement activities including: number of engagement activities (workshops, pop-up events, trainings, etc., number of participants at the engagement activities, and, as appropriate, evaluation of engagement activities). Evaluation questions could include: before and after data about awareness of project components, value of engagement activities, how they heard about the event (to determine the efficacy of outreach efforts), ideas for improvement for future events, etc.

Task 2 Vamos Mobility-as-a-Service (MaaS) (Project #2)

Project 2 is an expansion of the existing trip planning capabilities in the Vamos Mobility as a Service (MaaS) smartphone app. The project will add mobile transit ticketing and e-carsharing and e-bike sharing planning, reservations, and payment. Vamos will integrate all modes with interregional commuter bus and rail lines to the Bay Area, Sacramento, and Stanislaus. The Vamos app will make it easy to understand the best travel options available, given user preferences, when traveling from point A to B. The Vamos app can be accessed in multiple languages, and its screen features are ADA compliant.

Task 2.1 Vamos MaaS Project Administration

Activities under this task will be conducted throughout the four fiscal years of the proposed project, which includes the general requirements for administering the project as a sub-grantee.

2.1.1 Kick-off Meeting

2.1.2 Execute subcontracts

2.1.3 Quarterly partner meetings

2.1.4 Quarterly reports

2.1.5 Overall project management

2.1.6 Assist with budget, project management, grant coordination, and team meetings

Task 2.2 Technology Implementation: GTFS-FLEX Open Trip Planner (OTP); MaaS Platform; Mobility Payment

This task includes the operation and maintenance of the FLEX platform in Vamos in the San Joaquin Valley, as well as the integration of new e-carsharing and e-bikesharing services. The platform will also be modified to allow for interregional transit planning via commuter bus and rail to the San Francisco Bay Area and Sacramento. This task also includes the operation and maintenance of the MaaS system throughout the project term. Also, costs will be incurred to enable discovery, reservations, and payment for the ebikesharing and e-carsharing system in Vamos. Ridehailing can be integrated at no cost, if Uber and/or Lyft agree to join the platform. The MaaS platform will also be modified to allow for personalized accounts to specify choice preferences (e.g., preferred destination,

modes, time, cost preferences, and walking distance). Also, the platform will enable features to allow an individual to access subsidies to pay for transit, e-carsharing, and e-bikesharing (i.e., the Transit and Shared Mobility Incentives project). The MaaS system will be upgraded with features to improve access for people with disabilities. Finally, this task will extend the current mobile payment license throughout the life of the project in San Joaquin County. The feature allows users to both plan and pay for transit and other mobility services. The project proposes the expansion of mobile payment to Stanislaus County for intercounty travel.

2.2.1 Operate and maintain FLEX in Vamos enabling fixed route transit, deviated bus, dial-a-ride, and shared mobility services.

2.2.2 Integrate e-carsharing and e-bikesharing with transit in Vamos.

2.2.3 Integrate ride-hailing (if Uber and/or Lyft agrees) with transit in Vamos.

2.2.4 Integrate interregional transit service to the Bay Area and Sacramento in Vamos, leveraging on-going coordination efforts with regional rail and bus transit operators of San Joaquin County.

2.2.5 Operate and maintain existing Vamos MaaS system (SaaS).

2.2.6 Integrate discovery, reservation, and/or payment for e-carsharing and bikeshare in Vamos, including user interface.

2.2.7 Integrate reservation and payment for integration of Uber and/or Lyft for first and last mile service only (pending Uber and/or Lyft agreement).

2.2.8 Enable personalized accounts with preference settings (e.g., destination, modes, time, cost preferences, and/or walk distance).

2.2.9 Develop general promotions and subsidies for disadvantaged groups.

2.2.10 Enable ADA Accessible features (e.g., support for screen readers, high visibility fonts and colors, and/or UI design).

2.2.11 Enable transit fare payment in Vamos for San Joaquin County.

2.2.12 Enable transit fare payment in Vamos for Stanislaus County.

Task 2.3 Data Collection

Project data will be collected that describes how Vamos is used by participants to a) plan travel, b) reserve services, and c) pay for services. Vamos user data will be captured on the trip origin and destination by a participant and the recommended travel alternatives. Individual planning activities as they progress (or not) to reservations and payment of services will be tracked as well as reservations and/or payment activity in case planning activities did not precede them. All individual data will be anonymized, and origin and destination will be related to census blocks.

Before and after surveys will be designed and implemented to capture individual's socio-demographic attributes, use of private vehicles by type, and to reflect on the anticipated use of the service (before) and actual use of the service (after).

Follow requirements described in Task 0.10 for data collection.

2.3.1 Draft data collection and evaluation plan.

2.3.2 Draft and test survey Instruments.

2.3.3 Implement and monitor survey and data collection.

2.3.4 Clean data and provide summary report quarterly.

2.3.5 Conduct quarterly lessons learned meeting with project partners and provide summary of findings.

2.3.6 Document data collection and cleaning method and summary statistics on data quality (e.g., response rates and other limitations) in a final report

Task 2.4 Marketing

A marketing campaign for Vamos will be developed and evaluated as part of the San Joaquin Regional Transit District's Federal Transit Administration's Innovation Mobility Initiative (or FTA IMI) grant. In years 3 and 4, SJCOG will fund the implementation of the marketing methods found to be most successful from the FTA IMI grant.

2.4.1 Develop marketing campaign as part of FTA IMI grant (prior to launch of STEP project)

2.4.2 Implement and evaluate marketing campaigns for FTA IMI grants.

2.4.3 Continue the most successful marketing methods after FTA IMI grant.

Task 2.5 Institutional Structures for Sustainability

These tasks will be funded by RTD's FTA IMI grant. This grant covers meetings with Stanislaus and San Joaquin County transit agencies and companies such as Kyyti and Trillium to discuss data and maintenance requirements of the Vamos platform. It also funds the development of a governance framework and decision-making process as well as the development of data and API standards.

2.5.1 Meetings with Stanislaus and San Joaquin County transit agencies and companies such as Kyyti and Trillium to discuss data and maintenance requirements.

2.5.2 Develop governance framework and decision making process.

2.5.3 Develop data and API standards

Task 3 Battery Electric Vehicle Carsharing (e-carsharing) (Project #3)

The round-trip e-carsharing project includes 30 battery-electric vehicles distributed in 10 to 15 locations throughout the study areas. Stations will potentially be located at (1) homeless housing developments and affordable housing through a partnership with the San Joaquin Housing Authority, (2) two rail stations through a partnership with ACE/Amtrak, and (3) with college campuses through partnerships with San Joaquin Delta College, and other colleges such as Carrington College, UEI College, and University of the Pacific. The non-profit service will provide low-cost hourly and daily rentals to its low-income members. The service will provide residents with a new way to travel to destinations that are not feasible to access by existing transit. Vehicles will be equipped with telematics that enable a user to reserve vehicles from their smartphone or computer.

Task 3.1 E-Carsharing Project Administration

3.1.1 Kick-off meeting

3.1.2 Execute subcontracts

3.1.3 Quarterly partner meetings

3.1.4 Quarterly reports

3.1.5 Manage overall project start up

3.1.6 Manage construction of EVSE

3.1.7 Assist with budget, project management, grant coordination, and team meetings

Task 3.2 Mobility Demonstrations

3.2.1 Develop charging station locations, coordinate marketing with community engagement team, secure equipment and hire staff.

3.2.2 Deploy demonstration stations and initiate telematics and reservation system.

3.2.3 Operate demonstration for 4 months including rebalancing, customer service, maintenance and repairs. Demo period expected to launch in Quarter 1 of FY 21-22 and complete in Quarter 2 of FY 21-22.

Task 3.3 Operations

3.3.1 Procure battery-electric vehicle fleet and vehicle insurance. Vehicle procurement expected completion by end of 2021; vehicle insurance costs on-going through project completion. Follow the requirements for funded light-, medium-, and heavy-duty vehicles:

- Vehicles funded by this grant comprise a fleet that must be maintained throughout the term of the grant agreement. Changes to the fleet after grant execution are subject to prior approval by CARB.
- Vehicles must be zero-emission.
- Vehicles may be purchased or leased (2-year minimum lease period).
- Vehicles must be on the eligible Clean Vehicle Rebate Project (CVRP) or Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) Eligible Vehicle lists, at the time of purchase, including vehicle models that were removed due to CVRP policy changes effective December 3, 2019.
- Vehicles must be registered in California.
- Vehicles must be compliant with all applicable State requirements, including, but not limited to applicable CARB engine or vehicle approval or certification and Department of Motor Vehicles licensing.
- No modifications can be made to the vehicle's emissions control systems, hardware, or software calibrations (California Vehicle Code (CVC) Section 27156).
- Vehicle title cannot be salvaged (as defined in CVC section 544).
- Vehicles must have data collection devices or data collection metrics included in their base mode options. Data collection devices can be installed post-purchase.
- Vehicles must be under warranty with the manufacturer for the duration of the grant term.
- Used vehicles must meet the following additional requirements at the time of purchase or lease:
 - Vehicle model year must be 4 years or newer.
 - Vehicle mileage cannot exceed 48,000 miles.
 - Vehicle cannot have any outstanding recall notices. If there has been a recall notice for the vehicle model, documentation must be provided that the problem has been addressed before the vehicle is purchased or leased.
 - Vehicles must be inspected by a licensed automotive mechanic.
 - Batteries in vehicles must be new (new batteries may be purchased).
 - Vehicles that previously have participated in CVRP (received rebates) must have passed the compliance period and have fully complied with program requirements.
 - Vehicles must be formerly listed under the eligibility list of CVRP according to their model years.

3.3.2 Enable vehicle telematics.

3.3.3 Account for other vehicle costs.

3.3.4 Deploy Electric Vehicle Supply Equipment (EVSE) charging infrastructure at about 10-15 sites. Follow the requirements for funded EVSE purchase and installation:

- EVSE must be installed to provide electricity to project vehicles.
- EVSE must comply with California Electric Vehicle Infrastructure Project (CALeVIP) equipment requirements.
- EVSE may be installed in commercially or residentially zoned locations.
- EVSE may include ports for micromobility vehicle charging or fueling if the project design includes micromobility vehicles.
- EVSE may be Level 2 (rated up to 240 volts alternating current [AC], up to 60 amperes [amps], and up to 14.4 kilowatts) or Level 3 (high voltage AC or direct current [DC] with the capability to charge a vehicle to approximately 80 percent capacity within 30 minutes).
- EVSE must include a maintenance plan for continued reliable operation and unforeseen breakdowns of the charging infrastructure
- Per Assembly Bill 841 (Ting, 2020) added Public Utilities Code (PUC) section 740.20, which requires Electric Vehicle Infrastructure Training Program (EVITP) certification to install electric vehicle charging infrastructure and equipment for work performed on or after January 1, 2022, subject to certain exceptions (see below). Therefore, all electric vehicle charging infrastructure and equipment funded by STEP located on the customer side of the electrical meter shall be installed by a contractor with the appropriate license classification, as determined by the Contractors' State License Board, and at least one electrician on each crew, at any given time, who holds an EVITP certification. Projects that include installation of a charging port supplying 25 kilowatts or more to a vehicle must have at least 25 percent of the total electricians working on the crew for the project, at any given time, who hold EVITP certification. One member of each crew may be both the contractor and an EVITP certified electrician. The requirements stated in this paragraph do not apply to any of the following:
 - Electric vehicle charging infrastructure installed by employees of an electrical corporation or local publicly owned electric utility.
 - Electric vehicle charging infrastructure funded by moneys derived from credits generated from the Low Carbon Fuel Standard Program (Subarticle 7 (commencing with Section 95480) of Article 4 of Subchapter 10 of Chapter 1 of Division 3 of Title 17 of the California Code of Regulations).
 - Single-family home residential electric vehicle chargers that can use an existing 208/240-volt outlet.
- Beginning January 1, 2022, SJCOG will be required to submit proof to CARB of the required EVITP certification before performing any installation work as described above.

Task 3.4 Data Collection

Follow requirements described in Task 0.10 for data collection.

3.4.1 Draft data collection and evaluation plan.

3.4.2 Draft and test survey Instruments.

3.4.3 Implement and monitor survey and data collection.

3.4.4 On a quarterly basis, clean data and provide a summary report.

3.4.5 Meet quarterly for a lessons learned meeting with project partners and develop a summary of findings.

3.4.6 Develop a final report documenting data collection and cleaning method and summary statistics on data quality (e.g., response rates and other limitations).

Task 3.5 Marketing

3.5.1 Develop marketing campaign, secure contracts and ad buys (prior to launch of STEP project).

3.5.2 Design develop and distribute digital and analog collateral.

3.5.3 Conduct marketing including staff, collateral, social media posting & boosting, digital meetings, facilitation of online advertising, writing print ads and articles, press releases, interviews and pop-up events.

Task 4 Electric Pedal Assist Bikesharing (e-bikesharing) (Project #4)

One-hundred electric pedal assist bikes will be located at approximately 12 stations in a geofenced study service area. The e-bikesharing supports bus rapid transit route along Pacific Ave. The project will significantly improve first-and last-mile access to transit and provide an alternative travel mode to supplement infrequent transit service and transit with limited service hours. The non-profit service will provide low-cost hourly and daily rentals to its low-income members.

Task 4.1 E-bikesharing Project Administration

4.1.1 Kick-off meeting

4.1.2 Execute subcontracts

4.1.3 Quarterly partner meetings

4.1.4 Quarterly reports

4.1.5 Overall project management

Task 4.2 Implement Mobility Demonstrations

4.2.1 Develop locations

4.2.2 Coordinate marketing with community engagement team

4.2.3 Secure equipment and hire staff

4.2.4 Deploy demonstration stations and initiate SIMs and reservation system

4.2.5 Operate demo for 4 months including rebalancing, customer service, maintenance and repairs. Demo period expected to launch in Quarter 1 of FY 21-22 and complete in Quarter 2 of FY 21-22.

Task 4.3 Operations

4.3.1 Procure approximately 100 electric pedal assist bikes. Bicycle procurement expected completion by end of 2021.

Follow the requirements for funded micromobility vehicles:

- Purchased micromobility vehicles must be new.
- Micromobility vehicles funded by this grant comprise a fleet that must be maintained throughout the term of the grant agreement. Changes to the fleet after grant execution are subject to prior approval by CARB.
- Micromobility service must include a maintenance plan for continued reliable operation and unforeseen breakdowns of the charging or fueling infrastructure and

repairs and maintenance of the vehicles.

- Micromobility service must be registered with the local jurisdiction, where available.
- Micromobility vehicles must have data collection devices or data collection metrics included in their base mode options. Data collection devices can be installed post-purchase.

4.3.2 Confirm site selection for about 12 e-bike charging stations and station infrastructure.

4.3.3 Hire staff to conduct operations.

4.3.4 Deploy and support bicycle charging stations and pedestrian Infrastructure. Follow the charging infrastructure requirements for funded EVSE purchase and installation outlined in subtask 3.3.4.

4.3.5 Conduct on-going systems operations and monitor live network.

Task 4.4 Data Collection

Follow the requirements described in Task 0.10 for data collection

4.4.1 Draft data collection and evaluation plan.

4.4.2 Draft and test survey Instruments.

4.4.3 Implement and monitor survey and data collection.

4.4.4 Clean data and provide summary report quarterly.

4.4.5 On a quarterly basis, conduct lessons learned meeting with project partners and summarize findings.

4.4.6 Develop final report documenting data collection and cleaning method and summary statistics on data quality (e.g., response rates and other limitations).

Task 4.5 Marketing

4.5.1 Develop marketing campaign, secure contracts and ad buys (prior to launch of STEP project).

4.5.2 Design develop and distribute digital and analog collateral.

4.5.3 Conduct marketing including staff, collateral, social media posting & boosting, digital meetings, facilitation of online advertising, writing print ads and articles, press releases, interviews and pop-up events.

Task 5 e-Workforce Development (Project #5)

The proposed e-carsharing and e-bikesharing programs will be local community-controlled operations, and thus workforce development is critical for future sustainability. An organization such as the Fresno Metro Black Chamber Foundation (FMBCF), the lead of Fresno's Clean Shared Mobility Network, will deploy one of the first apprenticeship programs in e-shared mobility operations in the City of Stockton. The project will provide full-time jobs and training for 10-20 candidates aged 18 to 24 supporting electric vehicle supply equipment (EVSE) for electric vehicle charging stations (siting, installations, and maintenance), e-fleet management (maintenance and repairs), and customer service. Workforce development will include the formation of partnerships with entities such as regional and local workforce development boards, local non-profits like the trade schools, community colleges, and other organizations with knowledge of the employment landscape. Specifically, possible partnerships with Carrington College, California State University Stanislaus, San Joaquin Delta College, African American Chamber of Commerce of San Joaquin County, and CalWorks will not only provide recruitment to the program but may also be locations for e-carsharing and e-bikesharing and a long-term home for e-workforce curriculum. In addition, implementation of this project will coordinate with the Workforce

Development Backbone of the Reinvent South Stockton Coalition to ensure cross-pollination across an emerging local workforce development ecosystem. The programs will be a model for other cities and regions throughout California and the nation.

Task 5.1 E-workforce Development Project Administration

- 5.1.1 Kick-off meeting
- 5.1.2 Execute subcontracts
- 5.1.3 Quarterly partner meetings
- 5.1.4 Quarterly reports
- 5.1.5 Overall project management

Task 5.2 Develop curriculum and integrate with workforce training program.

- 5.2.1 Develop curriculum, materials, responsibilities and schedules of employees in training.
- 5.2.2 Establish partnerships with regional and local workforce development boards, including partnerships with such organizations as Carrington College, California State University Stanislaus, San Joaquin Delta College, African American Chamber of Commerce of San Joaquin County, and CalWorks.

Task 5.3 Implementation

- 5.3.1 Conduct regular workforce training sessions. Candidates will work in a classroom setting for 1-2 hours per session.
- 5.3.2 Conduct special workforce trainings. In the classroom or in the field, candidates will work toward a dual topic or dual certification with the shared mobility operator, an academic institution, or other workforce program session/trainer.
- 5.3.3 Conduct in the field training (i.e. on-site at carshare or bikeshare station locations). Candidates will be working with manager and staff of shared mobility operations on tasks related to operations and management of the systems.
- 5.3.4 Provide multidisciplinary lectures. Candidates will participate/attend guest lectures on topics that advance general skill sets, including customer service, time management, database and other computer skills or software trainings, cultural sensitivity/diversity trainings, shared mobility/EV industry sector trainings – equipment or operations trainings, CPR/AED or other compliance and COVID-19 safety trainings.

Task 5.4 Data Collection

Follow the requirements in Task 0.10 for data collection.

- 5.4.1 Track the number of recruits, candidates, lectures, trainings, forums, graduations and placements over one year. Develop a final report summarizing work force development effort and lessons learned.

Task 5.5 Marketing

- 5.5.1 Recruit candidates - social media, partner ads, digital and analog. Develop a quarterly report summarizing marketing and outreach effort.

Task 6 Transit and Shared Mobility Incentives (Project #6)

This project will provide discounts and/or funds through the Vamos MaaS app to community members who qualify as transport-disadvantaged. The community engagement process will determine qualifications and levels of discounts and funding. The objective of this

project is to (1) support the use of Vamos, especially among the transport-disadvantaged, (2) encourage the transport-disadvantaged to use transit and the new e-shared mobility modes by reducing the cost of use, and (3) provide a general boost in income for transport disadvantaged that will allow them to access essential services and opportunities.

SJCOG will work with the community engagement team, as part of project-wide and project-specific efforts, to develop the incentive program components, including eligible transport-disadvantaged residents, verification of eligibility requirements, and subsidy levels (e.g., monthly total or service-specific levels).

Task 6.1 Transit and Shared Mobility Incentives Project Administration

6.1.1 Kick-off meeting

6.1.2 Allocate incentives (via invoices or subcontracts).

6.1.3 Quarterly partner meetings

6.1.4 Quarterly reports

6.1.5 Conduct overall project management.

6.1.6 Assist with budget, project management, grant coordination and team meetings

Task 6.2 Develop and Implement Incentives Program

6.2.1 Draft initial plan based on consultation with governance board.

6.2.2 Revise draft plan to include governance board's revisions.

6.2.3 Approve final draft plan.

6.2.4 Implement administrative requirements for incentives and in Vamos, as necessary.

6.2.5 On-going implementation of incentives until funds run out.

Task 6.3 Data Collection

Follow requirements described in Task 0.10 for data collection.

6.3.1 Draft data collection and evaluation plan.

6.3.2 Draft and test survey Instruments.

6.3.3 Implement and monitor survey and data collection.

6.3.4 Clean data and provide summary report each quarter.

6.3.5 Conduct quarterly lessons learned meeting with project partners and summarize findings.

6.3.6 Develop final report documenting data collection and cleaning method and summary statistics on data quality (e.g., response rates and other limitations).

Task 6.4 Marketing

6.4.1 Provide marketing materials for incentives included in Vamos, e-carsharing, and e-bikesharing project costs. Materials will promote available discounts to encourage use of the Vamos app and to reduce the cost of e-carsharing and e-bikesharing services to eligible users.

D. Products & Schedule:

1. Grant Administration – through March 2025
2. Community Engagement – ongoing through December 2024
3. EZHub and Vamos app development – ongoing through December 2024
4. Vehicle and Equipment Procurement – through December 2021

5. Electric charging equipment installations – through December 2021
6. Demonstration projects – September 2021 – December 2021
7. Launch live network electric shared mobility services – January 2022
8. On-going system maintenance and monitoring – January 2022 – December 2024
9. E-workforce Development activities – ongoing through December 2024
10. Shared mobility ridership incentives – January 2022 through December 2024
11. Draft Final Report to CARB – December 2024
12. Final Report to CARB – March 2025
13. Invoicing and progress reporting quarterly through March 2025

E. Funding Sources (000):

California Air Resources Board (CARB) Total Grant Award: \$7,480,385.53

FY 20/21	\$1,462,331.01
FY 21/22	\$2,329,423.32
FY 22/23	\$1,573,477.48
FY 23/24	\$1,456,177.48
FY 24/25	\$658,976.24

F. Responsible Agency: \$ (000)

SJCOG: \$ 2,329,423.00

G. Staff Required: (person months)

SJCOG: 1