

**PRELIMINARY DRAFT 02/20/2008**

**Washtenaw Livingston Rail Line (WALLY) Technical review  
Scope of Services**

Background

A coalition of local government officials and business leaders in Washtenaw and Livingston County are working to institute a 27-mile long commuter rail service between Howell and Ann Arbor Michigan. The Great Lakes Central Rail Road maintains operating rights over the State of Michigan owned rail line connecting these communities. A variety of efforts to initiate passenger rail service completed to date include:

- Ridership estimates
- Preliminary train schedule
- Preliminary connecting bus schedule
- Draft 10 year budget and financial projections
- Station area inventory and analysis
- Track, signal and grade crossing infrastructure capital improvement program
- Railroad operating plan and operating budget
- Preliminary environmental analysis
- Conceptual station platform design
- Draft business plan
- Completed grant applications
- Letters of support from local governments
- Railroad time table, operating rules and railroad track chart
- Draft articles of incorporation and bylaws

The Wally coalition is seeking an experienced professional, professional organization or operating agency with a history of implementing successful commuter rail service to review the materials developed and comment on what is needed to initiate and sustain service and present such findings to the public at meetings held in both counties.

The above list of documents and exhibits are available on the WALLY website at [www.ewashtenaw.org/wally](http://www.ewashtenaw.org/wally) or for inspection at the Washtenaw Area Transportation Study office at:

705 N. Zeeb Road, 2<sup>nd</sup> Floor  
Scio Township, Michigan

A key product from this undertaking for WALLY is a management plan with a defined critical path, capital and operating program recommendations and an implementation strategy for instituting viable service. The plan should be built on the significant work that has been completed to date. Ridership estimating is not necessary as a part of this project; however, the ridership estimates should be reviewed for reasonableness.

The following key areas are to be reviewed:

- Railroad Operating Plan and Operating Budget
- Station Development
- Track, Signal and Grade Crossing Infrastructure
- Ridership estimates
- Finance, and Administration
- Customer Service and Bus Interface
- Development opportunities and risks
- Ann Arbor Railroad Extension

Additional professional support is needed to interface with the Ann Arbor railroad in responding to their needs relative to bringing passenger rail service to Ann Arbor's downtown and possibly to the University of Michigan South Campus (Athletic Campus.)

In their written proposal, the contractor should identify the skill set(s) necessary to fully respond to the following issues and demonstrate the ability to identify efforts necessary to advance this creative start-up concept to revenue service operation. The following presents the issues to be reviewed and addressed by the selected contractor to assist and ready Wally to move forward. The coalition is poised to create a regional rail authority and initiated commuter rail service on the Wally corridor.

**Task 1. Project initiation, Administration and Project Coordination** – The selected contractor will attend a kick-off meeting with the Wally Coalition technical and leadership committees. The contractor will also cost out an option of meeting with the Counties of Washtenaw and Livingston and the Cities of Howell and Ann Arbor individually to discuss the pros & cons, as well as concerns and each party's expectations. If the individual meetings are held, they will occur prior to the kick off meeting so that all expectations are known and understood by all parties. The contractor will define the time line for their work and outline key milestones for delivery of critical elements of this undertaking in their proposal. Preliminary timelines for completion of the first phase review, definition of further efforts and determination of critical path for completion of preliminary assessment and action plan will be provided in the proposal with final timelines to be provided at this meeting. The contractor shall provide, at a minimum, written bi-weekly project progress and status reports. Contractor may elect to participate in the monthly Wally coalition meetings via electronic means.

**Deliverables:**

1. Project Initiation meeting
2. Kick off Meeting Notes and/or notes from each community meeting
3. Project Schedule including timeline, key milestones and completion date
4. Bi-weekly progress and status reports

## **Task 2. Review of work in significant areas**

The contractor will complete a review and assessment of existing work products provided. Individual technical memorandum will be prepared that identify critical needs for each of the following areas. The contractor may recommend reordering, adding to or deleting elements of this task.

### **1. Railroad Operating Plan and Operating Budget**

The contractor will review and comment on the GLCRR operations plan provided to establish sustainable commuter passenger service in this corridor. Review should also include visual inspection of rail infrastructure and equipment. GLCRR will furnish the equipment and pilot necessary to complete visual inspection at no cost to contractor. Observations of operations personnel's ability to meet all safety, contemporary standards required to operate passenger service and with special attention to assure ADA compliance will also be provided by the contractor.

The contractor shall review the operations issues including but not limited to locomotive maintenance, fueling and any other pertinent details including schedule of cleaning and maintenance of the coaches needs and comment on whether they meet appropriate standards.

The contractor shall review the anticipated mechanism(s) to provide service that can accommodate all passengers with handicaps.

### **2. Station Development**

The contractor shall review the coalition developed preliminary site evaluation and station development reports and provide a list of remaining steps towards completion. The contractor shall review rail station and system access, egress and parking needs. The contractor will identify assurances needed for Wally's interests in management and control of station sites.

The contractor shall identify all necessary design elements for station development including site-specific environmental issues, e.g., wetlands, possible contamination and underground utilities and other relevant matters. The contractor shall identify access to utilities, electricity and communications for station locations. The contractor shall provide examples and recommend construction-contracting processes.

The contractor shall describe processes to manage the interaction between project needs and community wants in light of the limited resources for such improvements.

The contractor shall review stations beyond the immediate platform design and development including but not limited to parking needs, access and circulation, interface areas for connecting transit service as well as "kiss and ride" areas. The contractor shall determine if station site access and circulation needs are appropriate for the service.

The contractor shall provide a recommended station maintenance operations plan. The contractor shall provide examples of plans for wayfinding signs to/from the stations.

### **3. Track, Signal and Grade Crossing**

The contractor shall review the railroad corridor's safety and ability to reliably convey passengers. The contractor shall review the MDOT estimate for the track, signal and grade crossing infrastructure capital improvement program. The contractor shall make a determination of the adequacy of coordination with adjoining railroad operators: the CSX railroad and the Ann Arbor Railroad. The contractor shall also provide examples of safety and security plans needed to assure public and passenger safety and make a recommendation for the Wally safety plan.

### **4. Ridership Estimates**

Surveys have been completed by the University of Michigan, Washtenaw County, the Ann Arbor DDA and the Chambers of Ann Arbor, Brighton and Howell that were used to estimate ridership. Data from the Census Transportation Planning Package has also been used to assist with the development of the ridership estimates. The contractor shall review all of this data and make an assessment of the reasonableness of the estimates and the rates of annual increase.

### **5. Finance and Administration**

The contractor shall review (not a legal review) the draft articles of incorporation and bylaws for the rail authority. The contractor shall provide a recommendation regarding the timing and appropriateness of an authority's formation.

The contractor shall identify and provide examples of operating and access agreements that may be needed with GLCRR, AARR, CSX Railroad and station property owners. The contractor is not expected to review the agreement between the authority and MDOT.

The contractor shall identify and provide examples of the program management necessary to guide station planning, design and construction activities. The contractor shall recommend an organizational structure for business operations. The contractor shall make a recommendation on ticket sales systems, cash handling and management. The contractor shall recommend staffing plans and staffing levels as well as personnel qualifications. The contractor shall review the efforts to date and recommend a transition to ongoing operating service.

### **6. Customer Service and Bus Interface**

The contractor shall review the proposed connecting bus schedule. The contractor shall review the marketing program and materials that exist and identify what is missing. The

contractor shall recommend options for fare collection systems that can coordinate fare revenue collection with AATA and LETS (the Washtenaw and Livingston County transit Authorities). The contractor shall provide examples of systems to capture and address customer concerns with consideration of Internet-based systems.

## **7. Development Opportunities and Risks**

There are several opportunities for development along the Wally route in the City of Howell, Genoa Township, Hamburg Township, Northfield Township and in Downtown Ann Arbor should those stations become operational. Hamburg Township is the only community with Transit Oriented development included in the Planning documents. The contractor shall evaluate the opportunities and risks of transit oriented development near the proposed stations.

## **8. Ann Arbor Railroad Extension**

The contractor shall evaluate options for extending service to downtown Ann Arbor and the University of Michigan South Campus. The contractor shall also recommend a course of action to address AARR, GLCRR and the Authority's needs and expectations.

Deliverables:

1. Technical memorandum that:
  - A. Provide an assessment of the following as described in detail above:
    1. Rail Operating Plan and Operating Budget
    2. Station Development
    3. Track Signal and Grade Crossings
    4. Ridership estimates
    5. Finance and Administration
    6. Customer Service and Bus Interface
    7. Development Risks and Opportunities
    8. Ann Arbor Railroad Extension
  - B. Identify additional work areas to complete planning phases
  - C. Identify critical path to initiation of service
2. Recommended approach to extend service south to Downtown Ann Arbor and the University of Michigan South Campus

## **Task 3. Funding**

Of critical concern is the financial capacity of the partner communities to initiate and sustain this service. The contractor shall review the preliminary budget spreadsheet and assumptions in light of additional work, if any, identified in Task 2. The contractor shall provide projections of revenue streams in broad categories; fares, local government subsidy, state and federal support. The contractor shall provide examples of revenue sources used by other similar services.

The contractor shall identify a plan that would to provide the resources to sustain service for a period of ten years. The basis for allocating costs to the various revenues sources should be outlined in sufficient detail to provide confidence in the sustainability of the service.

Deliverables:

1. Technical Memorandum Defining Capital needs for service start-up
2. Definition of initial annual and ongoing operations budget including revenue projections
3. Identification of possible funding sources with documentation of assignment of local costs

#### **Task 4. Final Report and Presentations**

The contractor shall synthesize the technical memoranda into a complete report consisting of three main elements; 1) review of work completed to date, 2) additional steps to initiate service including a project timeline with a critical path, and 3) a statement of financial sustainability of the system projected for the first ten years of operations. The contractor will make one presentation of their final draft findings to the Wally Leadership and Technical Committee(s). The contractor will revise the draft report responding to comments and concerns identified by the Wally Leadership and the Technical Committee. Pending acceptance of the report, the Contractor will prepare a presentation of their findings and recommendations for delivery at a minimum of four public meetings, two in each County. It is anticipated the presentations will be offered at the two county board meetings with an additional meeting at one key city in each county.

Deliverables

1. 25 Copies of Draft and final reports, as well as a word file of the same
2. 25 Copies of the Final Draft Business plan for operation of WALLY service including Executive summary and 10 year budget. An electronic version of the same in Microsoft Word and/or Excel will also be provided
3. Slideshow Presentation that outlines the review of work completed, additional steps to initiate service including the project timeline and critical steps for implementation and the financial plan that will be necessary to sustain the service which will be delivered at four public meetings
4. Microsoft PowerPoint electronic file of slide presentation

#### **Proposal Submission and Due Date**

Ten copies of the proposals shall be provided to Terri Blackmore at the address provided below with ten copies of the cost proposal provided in a separate sealed envelope. Included in the proposal (not in the cost proposal) shall be a breakdown by task by person hours of each person working on the effort. The proposal shall also include a detailed

timeline of the work to be completed. The cost proposal shall include an estimate of direct expenses, overhead expenses and the fixed fee.

It is important to note that this effort is not intending to use any FTA New or Small Starts funding to initiate service. The proposals should be no more than 40 pages in length including all supporting documentation on personnel. The proposals should be simple without color and only include that required to respond to the proposals. The proposals may include items that have been left out if it is pertinent to implementation of the proposed service.

The proposals shall be delivered to Terri Blackmore, WATS at 705 N. Zeeb, 2<sup>nd</sup> Floor, Ann Arbor, MI 48103 no later than 4:00 pm on March 10, 2008.

### **Timeline for Completion**

The contractor will have 60 days from the date of the notice to proceed to complete the work a draft final report once notice to proceed is issued. The WALLY coalition also needs to respond to a Congressional request for a long term needs and budget for this service by April 30, 2008 if possible. This may be possible using the draft documents or by prioritizing the review. The coalition's priority though is for a complete and useable report so if it is not possible to make the April 30<sup>th</sup> Congressional deadline the contractor should note that in their proposal. Additional time may be provided for public presentation and delivery of a final report.

### **Contact person**

All questions regarding this proposal shall be provided in writing to Terri Blackmore at [blackmoret@miwats.org](mailto:blackmoret@miwats.org) or 705 N. Zeeb Road, Ann Arbor, MI 48103 no later than noon on March 7, 2008. No telephone questions will be accepted. All questions and the responses will be provided on the WALLY website at [www.ewashtenaw.org/wally](http://www.ewashtenaw.org/wally).

### **Selection Process**

The WALLY Coalition Technical Committee will review and rank the proposals awarding up to 40 points for qualifications, up to 50 points based on the technical proposal and up to 10 points for the cost proposal. If there is no obvious winner, the Committee may decide to interview up to three contractors. The Committee reserves the right to award the contract without holding interviews. The City of Howell will negotiate with the preferred contractor and will award the contract once agreement is reached.