Smart Growth America
Improving lives by improving communities

DATE: June 10, 2019
TO: Connect Transit Board of Trustees
FROM: Beth Osborne, Smart Growth America
SUBJECT: "Connect to the Future" Facilitator Proposal

Smart Growth America (SGA) proposes to assist the Connect Transit Board of Trustees in convening a Connect to the Future Work Group (Work Group) to facilitate a visioning process for the future of transit in Bloomington-Normal.

Envisioning and building out a public transit system that meets the needs of residents in Bloomington-Normal will require input from diverse stakeholders who can speak to the multifaceted roles the region's transit system should serve. A good local transit system connects all residents to the jobs and services they need at the times of day when they need to access them, including disadvantaged residents who most need access to those opportunities and resources. It also supports the region's economic prosperity, helps older residents maintain a high quality of life when they can no longer drive, and contributes to a more vibrant community. While SGA has substantial transit expertise through our technical assistance work in communities around the country, the experts who can identify specific needs in Bloomington-Normal will be local stakeholders and residents of the community themselves.

SGA believes our extensive track record facilitating processes with stakeholders to identify local priorities in transportation and community development, as well as our expertise in public policy around transit and transit-oriented development, position the organization well to help Connect Transit facilitate a visioning process for the future of mobility in Bloomington-Normal. The following proposal outlines SGA's approach for accomplishing the scope of work, budget, and examples of past projects that speak to SGA's ability to meet the Work Group's needs.

Proposed Scope of Work

Background

Smart Growth America empowers communities through technical assistance, advocacy, and thought leadership to create livable places, healthy people, and shared prosperity. SGA has a strong track record of providing technical assistance to localities and states around the country to support transportation visioning and planning, local policy change, and community development around transit.

Many of SGA's programs follow this basic model: facilitating processes with multidisciplinary stakeholders to develop a vision and plan for implementation. Through our *Innovative State Transportation Policy* and *Accelerating Practical Solutions* technical assistance programs, SGA has

worked with many states to identify needed transportation policy reforms to better meet today's diverse demands, bringing together state transportation department staff and other stakeholders from local governments, transit agencies, and nonprofits. Through our *Building Blocks for Smart Growth* technical assistance program, SGA gives stakeholders in communities a chance to understand the technical aspects of smart growth development and build a strategy to achieve their goals. These and other technical assistance programs have helped us hone our approach to building a vision or action plan for change that represents a range of stakeholder needs and priorities.

SGA also has expertise in public transit planning, policy, analysis, and engagement. We have provided technical assistance to eight communities to support transit-oriented development, improve access to public transportation, and build new economic opportunities and pathways to employment for local communities. Each project involves collecting background information and data on the community, conducting a site visit and local stakeholder interviews to assess needs, and then developing and delivering a detailed technical assistance scope tailored to the community's transit and economic goals.

SGA is also currently leading a project to conduct engagement around the importance of transit in Minnesota through funding from the McKnight Foundation. SGA has facilitated discussions in communities around the state to talk about the significance of and need for better transit service, bringing together decision-makers, chambers of commerce, residents, and other stakeholders. In addition, SGA contributed to a study evaluating the fiscal, economic, and social returns of transit investments in the Twin Cities region and greater Minnesota.

Further examples of SGA's prior work on facilitation and community development in the transit and transportation arenas can be found at the end of this proposal.

Proposed approach

Many of the projects discussed above share a common approach: SGA utilizes its experience and expertise to provide education on best practices to build a common foundation of understanding on the topic; facilitates a series of discussions to identify local challenges and opportunities; and ultimately synthesizes the outcomes of these discussions into recommendations that represent the priorities of the group, which the group can then implement moving forward. SGA will bring this approach to Connect Transit's initiative.

SGA proposes to facilitate the transit visioning process in Bloomington-Normal through a combination of in-person and video conference meetings with the Work Group to reduce travel costs. This proposal recommends up to six in-person meetings and up to four video conference meetings, and provides an estimated cost per meeting. The Connect Transit Board could decide to reduce the number of meetings to reduce the cost to deliver this scope. Given delays in the request for proposals process and difficulty achieving broad participation in meetings and

recommendations review from Work Group members during the November and December holidays, SGA recommends a project timeline from July 2019 to January 2020.

Scope of work:

Task 1: Project kick-off

Task description
SGA will work with the local project leads and Connect Transit Board as appropriate to gain an in-depth understanding of local goals and background for this initiative and develop a detailed scope of work and schedule for the project, advising the local project leads as requested based on SGA's work in other communities around the country.

Actions and responsibilities
- Convene project kick-off call (SGA in partnership with local project leads/Connect Transit Board)
- Confirm project scope, roles, and schedule (SGA in partnership with local project leads/Connect Transit Board)
- Schedule monthly project coordination calls (SGA in partnership with local project leads/Connect Transit Board)

Deliverables
- Detailed project timeline and roles

Timing
- July 2019

Task 2: Engage Connect to the Future Work Group

Task description
SGA will work with the Connect Transit Board of Trustees and local project leads to develop an equitable approach for selecting members of the Work Group. SGA will recommend types of stakeholders to engage and provide guidance to the local project leads in selecting specific stakeholders to ensure diverse representation across disciplines and perspectives. SGA will then assist the Connect Transit Board of Trustees in drafting and sending invitation letters to prospective members that articulate the purpose of the Work Group and time commitment. SGA recommends that the invitations come from the Connect Transit Board of Trustees to encourage local participation and buy-in.

Actions and responsibilities
- Provide template with types of stakeholders to engage to create diverse representation across disciplines and perspectives (SGA)
- Select specific target Work Group members (local project leads/Connect Transit Board, through guidance from SGA)

- Draft invitation letter for Work Group members articulating purpose and time commitment (SGA)
- Send invitation letter to prospective Work Group members (local project leads/Connect Transit Board)
- Collect confirmations (SGA)
- Identify gaps in representation based on responses (SGA)
- Identify and engage stakeholders to fill any gaps in representations (local project leads/Connect Transit Board, through support from SGA)

Deliverables
- Proposed and final list of Work Group members
- Invitation letter for Work Group members

Timing
- July-August 2019

Task 3: Review of existing guiding plans and documents

Task description
With support from the local project team, SGA will obtain and review local plans and guiding documents, including the Connect Transit 2023 Strategic Plan, the Regional Planning Commission Mid-term Mobility Plan, and other documents relevant to the work. SGA will provide an overview of the existing relevant goals and plans in the initial Work Group meeting to build a common understanding of the work that has already been done in the region and how this visioning effort will fit into and build on that work.

Actions and responsibilities
- Share relevant plans and guiding documents with the SGA project team (local project leads/Connect Transit Board)
- Review relevant plans and guiding documents to inform this initiative and the vision developed (SGA)
- Present a summary of the relevant guiding documents to the Work Group at the initial meeting to build shared understanding (SGA)

Deliverables
- Presentation summarizing relevant guiding documents and their relationship to this effort

Timing
- July-August 2019

Task 4: Plan and facilitate a series of work group meetings (August 2019 - January 2020)

Task description

SGA will work with the local project leads to plan and facilitate up to six in-person Work Group meetings (up to one half-day each) and up to four remote video conference meetings over a five-month period. This will include working with the local project leads to schedule each meeting at the beginning of the project, developing agendas and presentation materials as appropriate, leading each meeting, and facilitating discussions during each meeting to build a representative community vision for the public transit system in Bloomington-Normal over the duration of the project.

Early meetings in this series will focus on building a shared understanding of public transit, including existing transit in the region, relevant local plans, the benefits of a robust transit system, and best practices from peer communities. SGA will facilitate discussion among the Work Group about current mobility challenges in Bloomington-Normal, opportunities, and priorities. SGA will begin to synthesize recommendations based on these earlier meetings and will structure the later meetings to solicit Work Group reactions to and feedback on preliminary recommendations in order to develop final written recommendations that Work Group members support. During the final trip, SGA will also be available to present the recommendations to the Connect Transit Board and other decision-makers and stakeholders as desired.

Sample Work Group meeting schedule (for in-person meetings only)
- Meeting 1 (August 2019): Introductions; overview of Work Group purpose and goals; transit level-setting presentation; initial discussion of barriers and opportunities for Bloomington-Normal; identification of any major gaps in representation among the Work Group members.
- Meeting 2 (September 2019): Overview of relevant local plans; overview of best practices from peer communities; group discussion.
- Meeting 3 (October 2019): Subject area presentation(s) based on specific topics raised by the Work Group in greater depth (ex. transit funding, transit for suburban communities, messaging and marketing transit, etc.); brainstorm initial list of priorities for the region's future transit.
- Meeting 4 (November 2019): High-level presentation of preliminary wide-ranging and ambitious recommendations based on themes and insights from prior discussions; Work Group reactions and discussion; small group work to further flesh out recommendation areas.
- Meeting 5 (December 2019): Presentation of more detailed draft community vision with specific recommendations; Work Group reactions and discussion.
- Meeting 6 (January 2020): Presentation of final work group recommendations; discussion of next steps.

Actions and responsibilities
- Schedule up to six in-person work group meetings and up to four video conferences (SGA and the local project leads/Connect Transit Board in partnership)
- Send invitations for each meeting (Connect Transit Board, with support from SGA)

- Develop draft and final agendas for each Work Group meeting (SGA, through feedback from the local project leads/Connect Transit Board)
- Develop presentation materials as appropriate (SGA)
- Facilitate each Work Group meeting (SGA)

Deliverables
- Draft and final Work Group meeting agendas
- Presentation materials for Work Group meetings

Timing
- August 2019 - January 2020

Task 5: Develop, write, and assist in the delivery of recommendations for the region's future mobility platform (October 2019 - January 2020)

Task description
Through Work Group meeting discussions, SGA will facilitate a process to identify themes and build consensus around wide-reaching and ambitious recommendations for the region's future mobility platform. The latter half of the Work Group meetings will focus on fleshing these recommendations out in greater specificity through feedback from the Work Group. SGA will develop an initial outline of these recommendations in October 2019 based on Work Group brainstorming and will deliver the final recommendations to the Connect Transit Board on behalf of the Work Group by the end of January 2020 after a final review from the Work Group members in January.

Actions and responsibilities
- Develop an outline of recommendations for review and discussion during a Work Group meeting (SGA)
- Develop draft recommendations for review and discussion by the work group and local project leads (SGA)
- Provide feedback on draft recommendations (local project leads)
- Revise and finalize the recommendations based on feedback received (SGA)
- Present the vision to the Connect Transit Board (SGA)

Deliverables
- Outline of the Work Group's recommendations for Bloomington-Normal's future mobility platform
- Draft recommendations
- Final recommendations

Timing
- November 2019 - January 2020

Past Projects

Innovative State Transportation Policy (2014-ongoing)

SGA works in partnership with governors, state departments of transportation, and other transportation providers to improve safety, create healthier, more livable neighborhoods, improve access to opportunities, and use limited transportation funds efficiently. SGA engages DOT staff and other stakeholders in a series of workshops to build a shared understanding of best practices, identify barriers in the agencies' rules and culture, and brainstorm ways to remove those barriers. SGA then develops written recommendations for the agency that summarize the findings and ideas raised by participants during the workshops. These workshops serve two purposes: 1) providing education to state DOT staff to build their capacity to better meet changing demands on the systems they manage, including pedestrian, bicycle, and transit needs; and 2) facilitating ongoing discussion over several months to draw out embedded challenges in the DOTs' current practices and opportunities to make changes.

Accelerating Practical Solutions (2017-2018)

SGA delivered workshop and recommendations reports to eight state transportation agencies focused on updating their practices and executive strategic directions to meet growing and changing demands on the networks they manage. Workshops brought teams of experts to deliver recommendations to State DOT staff and other stakeholders, such as consultants, MPOs, local governments, advocacy groups, transit agencies, and other partners. The workshops covered topics like complete streets, multimodal access, asset management, practical design, coordination with land use, context-sensitive solutions, and more. A series of blog posts summarizing the most common recommendations can be found at https://smartgrowthamerica.org/how-to-build-a-better-state-dot-the-digest/.

Transit Oriented Development Technical Assistance | Provided to 13 communities (2016-ongoing)

Through support from the Federal Transit Administration, SGA has delivered transit-oriented development (TOD) technical assistance to communities selected through a compeititve application process. Phase One of this technical assistance involved three stages to assess local capacity to support transit-oriented development. The first stage was background research and data collection on land use, market conditions, housing needs, and other information provided by the city and transit agency partner and other publicly available data sources. The second stage was an on-site assessment that included stakeholder interviews and a tour of the technical assistance study area, transit project, and adjacent neighborhoods. In the final stage, SGA developed scopes of work with each community for in-depth technical assistance based on the background research, data analysis, and onsite observations, among other information.

Phase Two of each project consisted of technical assistance delivery, in which the individual community project teams executed the scope developed with the communities. Specific technical

assistance services were provided to the communities, including policy and regulatory analyses, zoning code reviews, and TOD maturity assessments, among other services.

For example, the City of Richmond TOD technical assistance focused on two components: 1) a market assessment of the station areas along the corridor, aimed at identifying six station areas with the greatest near-term TOD potential, and 2) assistance in the planning effort for successful, equitable TOD in the Orleans Station/Fulton area. SGA facilitated a charrette that resulted in a community-driven, preferred alternative scenario for land use, street connectivity, non-motorized transportation infrastructure, and open space, all informed by the community's vision for Fulton.

Minnesota Transit Funding Engagement (2018-2019)

SGA's transportation advocacy program, Transportation for America (T4America), led an effort to facilitate discussions in Minnesota communities about the importance and significance of transit services throughout the state. This included organizing events with diverse stakeholders to talk about transportation needs across Minnesota, gain an understanding of how individuals perceive transit within their community, and advocate for greater investment in transit across Minnesota. These events and discussions brought together local Chambers of Commerce, elected officials, Congressional representatives, businesses that participate in the supply chain for transit rolling stock and facilities, and citizens. T4America coordinated this effort with several Minnesota-based organizations who are also support a healthy transportation system. T4America also co-authored a report analyzing the benefits of transit in the Twin Cities and Greater Minnesota, including the direct return on investment of investments in transit in the Twin Cities region and broader economic, sustainability, and social benefits of transit statewide.

Anne Arundel County

In April 2019, SGA led a full day visioning exercise with Anne Arundel County to kickoff their comprehensive planning process. The workshop featured presentations on both the history of planning in Anne Arundel as well as the national trends impacting the need for different kinds of housing, infrastructure, and development. The SGA team led participants through a series of discussions and exercises to identify their priorities for their communities as well as the opportunities and barriers to becoming the kind of place they want Anne Arundel to be.

Governors' Institute on Community Design (2005-2019)

The Governors' Institute on Community Design (GICD) helps states address economic development, housing, transportation, and other pressing issues that relate to how communities grow and develop. The typical assistance format consists of a tailored two-day workshop at which the Institute brings together a governor and his or her cabinet and staff to work with nationally renowned experts and practitioners on specific issues and priorities identified by the governor. Other forms of assistance include evaluating how a state influences development patterns through tax and economic development policy and providing assistance to a particular state agency to

reform internal processes or policies. Following a workshop, the Governors' Institute develops a recommendations report delivered directly to the governor.

Building Blocks for Smart Growth (2011-2018)

Smart Growth America provides technical assistance through a competitive process to give communities a chance to understand the technical aspects of smart growth development and build a strategy to achieve their goals. SGA offers one- or two-day workshop on a subject of each community's choosing from a set of modules on an annual basis through a competitive application process.

Over a seven years period, the SGA team and its subconsultants have conducted 90 workshops across 40 states. Topics include: implementing smart growth 101, regional planning for small communities, land use code audit, zoning codes for small cities, complete streets (specifically laying the foundation, policy development, and policy implementation), audits on walkability and parking, transportation performance measurement, and TOD 101.

Following the in-person delivery of the workshop, each community received a detailed next steps memorandum summarizing the process and the observations of the SGA team. Our workshop presentations and recommendations are highly customized based on these observations and the project team's experience working in other similar communities across the country. Each community then provided SGA with three progress reports following their receipt of the final next steps memo—at one month, six months, and 12 months. This created a layer of accountability that ensured the community went to work right away.

Florida DOT's Bike & Pedestrian Safety Plan (2016)

SGA facilitated a series of seven stakeholder meetings around the state of Florida on behalf of the Florida State Department of Transportation to collect input for the update to the state's Pedestrian and Bicycle Strategic Safety Plan, a five-year plan outlining comprehensive strategies for improving pedestrian and bicycle safety in the state. This involved building a shared understanding of the factors that influence pedestrian and bicycle safety among diverse meeting participants--from local public works staff to law enforcement officials and community residents--before soliciting input from those participants about what changes the state could make. SGA then synthesized the input and themes from these meetings into a summary report with recommendations.

Proposed Project Budget

Task 1: Project kick-off and administration

Staff	Rate	Hours	Total
Beth Osborne, Director, Transportation for America	$130	4	$520
Chris Zimmerman, Vice President for Economic Development	$130	4	$520
Jeri Mintzer, Program Manager	$70	8	$560
Rayla Bellis, Program Manager	$70	8	$560
Salary sub-total			**$2,160**
Direct expenses	Rate per month	Months	Total
Zoom video conferencing subscription	14.99	7	$105
Task total			**$2,265**

Task 2: Engage working group

Staff	Rate	Hours	Total
Beth Osborne	$130	4	$520
Chris Zimmerman	$130	4	$520
Jeri Mintzer	$70	4	$280
Rayla Bellis	$70	4	$280
Task total			**$1,600**

Task 3: Review of existing guiding plans and documents

Staff	Rate	Hours	Total
Beth Osborne	$130	4	$520
Chris Zimmerman	$130	4	$520
Jeri Mintzer	$70	4	$280
Rayla Bellis	$70	4	$280
Task total			**$1,600**

Task 4: Plan and facilitate 6 in-person and 4 video meetings
Two people from a project team of four will facilitate each in-person meeting.

Staff	Rate	Hours	Total
4a: Planning and preparation: agendas, logistics, and presentations			
Beth Osborne	$130	25	$3,250
Chris Zimmerman	$130	25	$3,250
Jeri Mintzer	$70	25	$1,750
Rayla Bellis	$70	25	$1,750
4b: Travel time (16 hours per person x 6 meetings)			
1 senior staff per trip	$130	96	$12,480
1 program manager per trip	$70	96	$6,720

4c: Zoom meetings (4 meetings at 60 mins each)

	Rate	Hours	Total
Beth Osborne	$130	4	$520
Chris Zimmerman	$130	4	$520
Jeri Mintzer	$70	4	$280
Rayla Bellis	$70	4	$280
Salary sub-total			**$30,800**

Direct Expenses	Amount per trip for 2 ppl	Number of trips	Total
Flights	$1,000	6	$6,000
Hotel	$500	6	$3,000
Meals	$300	6	$1,800
Other transportation (cabs or rental car)	$200	6	$1,200
Travel sub-total			**$12,000**
Task total			**$42,800**

Task 5: Develop, write, and assist in the delivery of recommendations for the region's future mobility platform			
Staff	Rate	Hours	Total
Beth Osborne	$130	8	$1,040
Chris Zimmerman	$130	8	$1,040
Jeri Mintzer	$70	22	$1,540
Rayla Bellis	$70	22	$1,540
Task total			**$5,160**

PROJECT TOTAL			**$53,425**