

Project Scope of Work Template

This Project Scope of Work template has been developed to include the minimum tasks that all Applicants will be required to perform in **grey-shaded, bold text**. The method each Applicant uses to complete each task (milestone) can vary. SANDAG has provided sample milestones that could be used to successfully achieve each task, as shown below. Applicants must update these sample milestones to demonstrate how they will complete the task.

DEFINITIONS

Access Provider means an organization or entity that directly provides, or contracts with a separate organization or entity to provide, On-Demand Transportation to meet the needs of persons with disabilities, as defined in Public Utilities Code Section 5431.5(a).

Fulfilled Trip means a rider requests a trip, the trip is accepted by a provider, and the rider reaches their requested destination.

On-Demand means a transportation service that does not follow a fixed route or schedule, and the provider can fulfill trip requests within twelve hours.

On-Demand Response Time is the time between when a trip is requested and when the passenger is picked up. For on-demand trips, this cannot exceed twelve hours.

Pre-Scheduled Trip Response Time is the time between the passenger's scheduled pickup time and when the vehicle arrives. If the vehicle arrives before the passenger's scheduled pickup time, the pickup delay shall be "0".

Wheelchair-Accessible Vehicle (WAV) means a vehicle equipped with a ramp or lift capable of transporting non-folding motorized wheelchairs, mobility scooters, or other mobility devices, as defined in Public Utilities Code Section 5431.

Applicant Name	On the Go (OTG)
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Task #1	Task/Milestone Description	Deliverables
1.	Access Provider Selection and Preparedness	Access Providers ready and able to begin providing On-Demand services
A.	Identification of Initial Third-Party Access Providers GRANTEE identification of initial third-party Access Providers to provide On-Demand WAV services.	Within Two (#) weeks following the Notice to Proceed, Two (#) vendor(s) will begin providing AFA rides (list vendors): • SDMED • Care7
B.	Contracting with Additional Third-Party Transportation Vendors GRANTEE contracting with additional transportation vendors. • GRANTEE will coordinate with other providers who could provide AFA service • GRANTEE will work with each potential	Within Four (#) weeks following the Notice to Proceed: • GRANTEE will review demand and add additional vendors to contract for AFASD services to plan for growth in demand. Within Eight (#) weeks following the executed grant agreement or Notice to Proceed:

	Access Provider vendor to complete the following before the vendor provides AFA service: ○ Meeting the necessary CPUC charter-party carrier permit requirements (or meeting additional requirements if non-permitted) ○ Finalize rates and establish contract parameters (e.g., service area and vehicles).	• Additional transportation vendor agreement(s) will be finalized and executed. • OTG will continue to on-board additional providers as needed throughout the contract period.
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Task #2	Task/Milestone Description	Deliverables
2.	Additional Support Services and Equipment Selection and Preparedness	Support services were established, and equipment was purchased to assist with On-Demand service.
A.	Contracting with Third-Party Paratransit Consultant GRANTEE will identify consultants specializing in paratransit operations, training and development, contracting strategies, and sustainability to help develop or amend the detailed Operations Plan. GRANTEE will establish rates and contract parameters with the selected paratransit consultant.	Within Two (#) weeks following the Notice to Proceed: • A third-party paratransit consultant will be solicited. Within Four (#) weeks following the Notice to Proceed: • A signed third-party agreement will be finalized and executed with the selected paratransit consultant.
B.	Contracting with Third-Party Vehicle Mechanic/Inspector or Hiring Vehicle Mechanic/Inspector GRANTEE will select a Mechanic/Inspector specializing in transit vehicles and driver requirements to develop a detailed, sustainable operations strategy and streamline service. GRANTEE will establish rates and contract parameters with the selected Mechanic/Inspector.	Within Four (#) weeks following the Notice to Proceed: • A third-party Consultant/Mechanic or in-house Mechanic/Inspector will be solicited. Within Eight (#) weeks following the Notice to Proceed: • A signed third-party agreement will be finalized and executed with the selected Vehicle Mechanic/Inspector.
C.	Contracting with Third-Party Marketing Consultant or Hiring Marketing Staff (if applicable) GRANTEE will select a Marketing Consultant or Marketing staff to develop and implement a comprehensive outreach and marketing plan	OTG has an in-house marketing team that will immediately begin to execute a comprehensive outreach and marketing plan upon the Notice to Proceed. Within ten weeks, OTG will execute a contract with a Third Party PR Firm for Press Release and media circuit.
D.	Identification of Service Analyst GRANTEE will interview candidates and select a qualified person to hire as one new GRANTEE staff position, a Service Analyst,	Within two (#) weeks following the Notice to Proceed: • A new Service Analyst position for GRANTEE will be posted.

	who will track all AFA service and expense data for reporting and invoicing.	Within Eight (#) weeks following the Notice to Proceed: GRANTEE will hire a Service Analyst.
E.	Contracting with Third-Party Backup Call Center GRANTEE will begin backup call center service or extend its backup call center service contract to provide service to requestors during Business Hours and Extended Hours, seven days a week. GRANTEE will respond to requests within Business Hours, and backup call center will respond to requests during Business Hours and Extended Hours.	Within Six Months following the Notice to Proceed: OTG will extend existing call center hours to 24/7 based on program need.
F.	Contracting with Third-Party Trip Management Software GRANTEE will develop or amend its existing reservation and trip management application as needed.	Within Two (#) weeks following the Notice to Proceed: - Any necessary software enhancements to GRANTEE's existing, proprietary software will be executed Within Four (#) weeks of the executed agreement: - Software enhancements will be complete, and the updated system will be operational.
G.	Purchase of WAV Vehicles and Other Equipment GRANTEE will procure WAV vehicles and/or other equipment necessary to provide On-Demand WAV services such as cameras, software, and software integration.	Within _____ (#) weeks following the Notice to Proceed: GRANTEE will purchase one accessible hybrid-fueled WAV minivan Grantee will purchase any additional WAV vehicles needed, based on the needs assessment and draft Operations Plan. OTG has no plans to purchase WAV vehicles or other equipment.
H.	Conducting Vehicle Inspections - The GRANTEE's contracted mechanic/inspector will thoroughly inspect all vehicles before use in GRANTEE's WAV service. - GRANTEE or GRANTEE's vendor(s) will conduct general daily vehicle inspections - Once AFA service goes live, GRANTEE's Safety and Compliance Coordinator will perform vehicle inspections outlined in GRANTEE's Operations Plan.	Within twelve (#) weeks following the Notice to Proceed: GRANTEE will establish a final list of vehicles, and it will be updated as needed to reflect ongoing changes. The list will be provided to SANDAG upon request.

Task #3	Task/Milestone Description	Deliverables
3.	Development of Operations Plan	Completed Operations Plan
A.	Conducting Needs Assessment and Development of Draft Operations Plan	Within one (#) month following the start of AFA service:

	GRANTEE will conduct a needs assessment on the current demand for WAV services, the fleet size and capability, the number of trained drivers, etc. GRANTEE will accomplish this assessment by analyzing past service data and client feedback regarding accessible trip supply and demand. The project will be discussed during regional meetings such as Council on Access and Mobility (CAM) and the SANDAG Social Services Transportation Advisory Council (SSTAC). Regular meetings with each Access Provider(s) will ensure GRANTEE understands each vendor's needs to expand WAV capacity. These discussions will assess driver training, insurance expenses, additional vehicles needed, vehicle sharing, etc. GRANTEE will develop a draft On-Demand WAV services Operations Plan to include: • Description of day-to-day operations • Performance measures to assess daily operations • Techniques to deploy to adapt to changing needs or inability to meet minimum performance measures • Techniques to deploy to improve Response Times and/or On-Demand WAV presence and availability	• Completed needs assessment report Within eight (#) weeks following a Notice to Proceed: • A draft operations plan will be developed that details the service, program monitoring, performance measure, etc. • The operations plan will include findings from the needs assessment and outline the project's outreach and marketing strategy.
B.	Development of final Operations Plan	Within 12 (#) weeks following the executed grant agreement or Notice to Proceed: • GRANTEE's final Operations Plan will be completed.

Task #4	Task/Milestone Description	Deliverables
4.	Deployment of WAV Service	WAV trips
A.	Providing On-Demand WAV Service to the Public GRANTEE will begin providing On-Demand WAV service to the public. • On-Demand requests and reservations will be accepted by GRANTEE via telephone only until the reservation and trip management software application is available (Task 2.F.). • Service request/reservation hours will be 4:00 a.m. to 10:00 p.m., seven days per week, with a Response Time of one hour (#) hours after GRANTEE receives the	Within 14 (#) calendar days following the Notice to Proceed: GRANTEE will begin providing AFA WAV trips to members of the public. • First priority will be given to wheelchair users who need a WAV. • Second priority will be given to non-wheelchair users with a disability • Requests for service for non-wheelchair users without a disability will be Fulfilled if capacity allows and the first two priorities have already been met

	request. • Requests received outside Business Hours and Extended hours will have a twelve hour Response Time • GRANTEE will stage _____ (#) vehicles in different locations of the region to minimize Response Time and match demand.	
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Task #5	Task/Milestone Description	Deliverables
5.	Outreach efforts to publicize and promote available On-Demand WAV services to disability communities	Completed outreach efforts and well-informed disability communities
A.	Preliminary AFA Outreach and Marketing Preliminary AFA outreach will consist of meetings with other specialized transportation providers that may be interested in becoming an Access Provider, and presentations at the City of San Diego's Accessibility Advisory Board and the MTS Accessible Services Advisory Committee.	Within two (#) weeks of the Notice to Proceed: • Preliminary AFA outreach and marketing will begin
B.	Development and Deployment of Marketing Outreach with in-house Marketing Team GRANTEE and its marketing team will develop a marketing campaign and related materials to publicize and promote GRANTEE's WAV services to disability communities in low-income and minority areas and populations with limited English proficiency. GRANTEE's Operations Plan will detail the complete outreach and marketing strategy. Outreach activities will include fliers (direct market mailing and partner distribution), community presentations, stakeholder meetings, GRANTEE and partner agency website postings, partner referrals (e.g., 211 San Diego), program workshops, and social media. GRANTEE will also advertise and market the service through its call center and website referral program.	Within eight (#) weeks of following the Notice to Proceed: • A complete outreach strategy will be implemented • All marketing materials will be finalized and utilized to advertise the service • GRANTEE will conduct the following activities under a 90-day marketing campaign to publicize and promote the GRANTEE's On-Demand WAV services: ○ Produce a photoshoot/video shoot that will be published on the GRANTEE's website and advertised using social media and paid media. ○ Develop a press release to announce the service to local media. ○ Once AFA service begins, conduct targeted outreach and follow-ups, and provide a high-level report of press release pickup, coverage, and media conversations. Outreach and marketing of AFA service will continue throughout the grant term.
C.	Adjustments to Outreach Activities The effectiveness of outreach activities will be monitored and adjusted by GRANTEE based on the response/demand of the target population. GRANTEE will ensure that: • Its On-Demand WAV services are	GRANTEE's flexible outreach strategy will ensure the services are publicized and promoted to disability communities throughout the San Diego region. The Outreach strategy will include targeting low-income and minority populations.

	effectively publicized and promoted to disability communities • It markets and promotes public awareness of its On-Demand WAV services in both low-income and minority areas as well as populations with limited English proficiency • Its services are made available to individuals who do not have a smartphone or internet or need additional assistance in requesting the service	The OTG service model is built with individuals without smart phones and internet service in mind.
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Task #6	Task/Milestone Description	Deliverables
6.	Monitoring program	Completed reports and monitoring checklist, tracking performance measures
A.	Adjustments to On-Demand WAV Service GRANTEE will review its Response Times and On-Demand WAV presence and availability and deploy strategies to ensure reasonableness and consistency with performance measures outlined in the Operations Plan and to ensure that Response Times are comparable to what a non-WAV on-demand requestor would receive from a Transportation Network Company (TNC). • Every month, GRANTEE's Service Analyst will monitor and review Response Times and On-Demand WAV presence and availability to ensure reasonableness and consistency with performance measures outlined in the Operations Plan • GRANTEE will deploy strategies that improve its Response Times or On-Demand WAV presence and availability as described in the Operations Plan	• Monthly report that describes Response Times and On-Demand WAV presence and availability of GRANTEE and its Access Providers. • Every month, GRANTEE will monitor Response Times exceeding one hour and review the information with the relevant Access Provider(s) to address delays due to driver actions or vehicle availability. • GRANTEE will deploy strategies to improve Response Times, including but not limited to: ○ Assisting Access Providers with identifying the most time-effective route to take ○ Contracting with new vendors to provide WAV service ○ Seeking new technologies used by transit operators or other specialized transportation providers to improve service
B.	Compliance Monitoring of Vehicles GRANTEE's Safety & Compliance Coordinator will review the preventative and routine vehicle maintenance performed by Access Providers to ensure consistency with industry standards, inspection requirements mandated by the CPUC, and other procedures outlined in the Operations Plan. GRANTEE will maintain the weekly vehicle observations, initial vehicle inspections, and annual inspections as described in the Operations Plan.	GRANTEE will provide a quarterly report outlining the findings of GRANTEE's review of preventative and routine vehicle maintenance. The report will also include any issues reported to GRANTEE by an Access Provider and any complaints received by GRANTEE or an Access Provider regarding AFA service. GRANTEE will deploy strategies to improve routine vehicle maintenance and inspections as described in the Operations Plan. These strategies will include: • Incorporating feedback from the certified mechanic during annual vehicle

		inspections • Providing training resources to Access Providers, including California Association for Coordinated Transportation (CalACT) and Community Transportation Association of America (CTAA) maintenance workshops.
C.	Compliance Monitoring of Drivers and Other CPUC Safety Requirements GRANTEE will review Access Provider files for all drivers who provide AFA service to ensure compliance with the safety requirements mandated by the CPUC: • Background checks • Driver training • Controlled substance and alcohol testing GRANTEE will deploy strategies to ensure compliance with the safety requirements mandated by the CPUC, including random requests for Access Providers to provide documentation for their drivers.	GRANTEE will deploy strategies to ensure its Access Providers comply with the safety requirements mandated by the CPUC, including maintaining records for insurance requirements, vehicle inspections, controlled substance and alcohol testing, driver training, and ongoing weekly vehicle observations. GRANTEE will require its Access Providers to retrain and certify any driver that fails to meet the safety requirements mandated by the CPUC before the driver is permitted to provide AFA service. GRANTEE will provide a quarterly report that includes the data compiled during the previous three-month period, including whether any complaints were filed against an Access Provider or its drivers.
D.	Quarterly Reports GRANTEE will track all required service data and meet all necessary quarterly reporting deadlines.	Every quarter and as described in the AGREEMENT, GRANTEE will provide to SANDAG: • CPUC Quarterly Data Report • SANDAG Quarterly Status Report
E.	Project Budget and Schedule Monitoring	GRANTEE will monitor its monthly spending to ensure alignment with budgeted expenses. The project schedule will be monitored to ensure tasks are being completed on time and the project is completed by the grant termination date.