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## Header 1

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 1109820

Procurement Type: Central Master Agreement

Vendor ID: 000000172976

Legal Name: RLS & ASSOCIATES INC

Alias/DBA:

Total Bid: \$223,097.37

Response Date: 10/13/2022

Response Time: 11:18

Responded By User ID: rsaries

First Name: Robbie

Last Name: Saries

Email: rlsasc@rlsandassoc.com

Phone: 937-299-5007

SO Doc Code: CRFQ

SO Dept: 0810

SO Doc ID: DMT2300000008

Published Date: 10/7/22

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Status: Closed

Solicitation Description: Coordination Plan for Public Transit Human Services

Total of Header Attachments: 1

Total of All Attachments: 1



Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

**State of West Virginia  
 Solicitation Response**

**Proc Folder:** 1109820  
**Solicitation Description:** Coordination Plan for Public Transit Human Services  
**Proc Type:** Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2022-10-13 13:30	SR 0810 ESR10132200000001878	1

**VENDOR**  
 000000172976  
 RLS & ASSOCIATES INC

**Solicitation Number:** CRFQ 0810 DMT2300000008  
**Total Bid:** 223097.3699999999953433871269 **Response Date:** 2022-10-13 **Response Time:** 11:18:55  
**Comments:**

**FOR INFORMATION CONTACT THE BUYER**  
 David H Pauline  
 304-558-0067  
 david.h.pauline@wv.gov

**Vendor Signature X** **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Coordination Plan				223097.37

Comm Code	Manufacturer	Specification	Model #
94131504			

**Commodity Line Comments:**

**Extended Description:**

Coordination Plan for Public Transit Human Services



# Request for Quote: Coordinated Plan for Public Transit Human Services

October 13, 2022

Prepared for the State of West Virginia, Public Transit Division



Submitted by: RLS & Associates, Inc.



## Moving Public Transportation Into the Future

October 12, 2022

David Pauline  
Department of Administration, Purchasing Division  
2019 Washington Street East  
Charleston, WV 25305

RE: Coordination Plan for Public Transit Human Services CRFQ 0810 DMT23\*8

Dear Mr. Pauline:

RLS & Associates, Inc. (RLS) is pleased to submit to the West Virginia Department of Transportation, Division of Public Transit (WVDPT) its proposal to update coordination plans that meet the requirements of the Federal Transit Administration's (FTA) Section 5310 grant program for 10 West Virginia planning and development regions; to assist FTA Section 5311 and 5307 subrecipients in their efforts to coordinate to the maximum extent feasible; to assist Metropolitan Planning Organizations with coordination efforts, if requested; and to provide technical assistance in the area of coordinated transportation to local entities and the WVDPT.

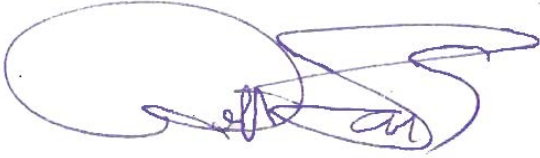
RLS has assisted State Departments of Transportation and regional and local communities with this specific type of work effort for more than two decades and considers it a privilege to have this opportunity to again work with WVDPT and its subrecipients. Coordinated Transportation planning is an opportunity to bring subrecipients and other organizations together to address the unmet needs and gaps in access to transportation for work, medical appointments, shopping, wellness, and all other activities. RLS appreciates the opportunity to assist WVDPT and its Section 5310, 5311, and 5307 subrecipients as well as other private, inter-city and human service agencies to enhance and adapt services to meet unmet service needs, increase ridership, and identify current and future capital and operational needs.

Many of the RLS team members were involved with the original development of West Virginia's coordinated human services-public transportation plans and subsequent updates. Past experience developing the plans will create efficiencies in the planning and outreach efforts. As an enhancement, RLS has added new team members to this proposed approach to ensure that fresh perspectives are included as well as to provide the depth of availability from experienced staff that will enable RLS to meet all project deliverable deadlines in a top-quality manner.

RLS is a woman-owned, certified DBE in the State of West Virginia. The primary focus of RLS since its inception has been assisting rural and small, urban communities with public and human services transportation. The proposed project team's experience and credentials are more fully described within the proposal.

As President of RLS & Associates, Inc., I am the individual authorized to negotiate this offer. You may contact me by telephone at (937) 299-5007, email at [rlsasc@rlsandassoc.com](mailto:rlsasc@rlsandassoc.com) or mail at 3131 South Dixie Highway, Suite 545, Dayton, Ohio 45439.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Robbie L. Sarles", is written over a large, faint, circular watermark or stamp.

Robbie L. Sarles, President  
RLS & Associates, Inc.



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## I. KEY STAFF

RLS & Associates, Inc. (RLS) prides itself on an experienced and professional staff that is proficient in a wide variety of disciplines, poising RLS to quickly and effectively respond to its clients’ needs. It is this combination of staff and a tried and proven system of project management and customer service that places RLS ahead of many of its competitors. RLS has put together a team for the West Virginia Coordinated Transportation Plan Updates that continues RLS’ history of success; individual team members are presented below along with their areas of expertise. Table 1 provides a matrix to summarize relevant areas of expertise by team member. The paragraphs that follow offer additional clarification.

**Table 1: Areas of Expertise by Proposed Team Member**

RLS Key Project Team Member	Project Area of Responsibility	Area of Expertise Relevant to the Project										
		Local and Regional Coordinated Transportation Planning	Public Outreach & Involvement	FAST Act	Inter-city Bus	Americans with Disabilities Act	FTA Section 5310	(former) FTA Section 5316	CARES Act	Human Services Transportation	FTA Section 5311, 5307	Mobility Management Planning
Robbie Sarles	Principal-in-Charge	√	√	√	√	√	√	√	√	√	√	√
Laura Brown	Co-Manager/Lead Planner	√	√	√		√	√	√	√	√	√	√
Christy Campoll	Co-Manager/Lead Planner	√	√	√	√	√	√	√	√	√	√	√
Megan Matheny	Lead Planner	√	√	√		√	√	√	√	√	√	√
Kelly Shawn	Planner	√	√	√	√	√	√	√	√	√	√	
Zach Kincade	GIS/Stakeholder Outreach	√	√	√			√	√		√	√	√
Bethany Renner	Research/ Public Outreach	√	√	√			√	√		√	√	
Robin Lovins	Research		√	√								
JJ Kunkle	Editor/Quality Assurance		√									

RLS is prepared to dedicate the necessary staff and time to the project to ensure that all work is conducted responsively and responsibly. Because of the diverse expertise of the RLS staff, and their close proximity to West Virginia, we are confident that we can address all needs and requests presented by the DPT or its subrecipients in a timely and cost-efficient manner with excellent quality.

Ms. Robbie Sarles will be responsible for project oversight, quality assurance, adherence to the timeline and budget, and client satisfaction. She will be available to meet with the DPT to discuss project status, whenever required or requested. Ms. Sarles will be dedicated at a level of five percent availability to perform project work.

Ms. Laura Brown and Ms. Christy Campoll will serve as Co-Project Managers and will be coordinating the public outreach activities and schedule of Human Service Coordination Plans and Updates, reviewing the opportunities for and actual level of local input at each step in the planning process for completeness, and compliance with FTA, FAST Act, and DPT requirements. Ms. Brown and Ms. Campoll will also be the primary leads in preparing the Executive Summary. Ms. Campoll will be the RLS primary point of contact for the DPT Project Manager to communicate status updates, provide and discuss deliverables, and address questions that may arise throughout the planning process.

In addition, RLS will assign Lead Planners for each of the regions. Ms. Campoll will lead five regions; Ms. Matheny will lead two regions, and Ms. Brown will lead three regions. In addition, Ms. Renner,

Mr. Shawn, and Ms. Lovins will provide support for research and public/stakeholder outreach; Mr. Zach Kincade, RLS' GIS technician, will provide support to the Lead Planners in each task and provide GIS expertise pertaining to creative, appropriate, and successful project outcomes. Finally, Ms. Kunkle will also serve as the Quality Assurance Editor.

The Lead Planner will facilitate each of the regional meetings, guiding local stakeholders through development of the needs assessment and prioritized coordinated transportation strategies. In this capacity, the Lead Planners will assist local stakeholders to identify goals and gaps in service by county and by region, and in the identification of best practices in local coordination activities. They will also be available for progress meetings and presentations to the DPT and West Virginia Transportation Coordinating Council, upon request of the DPT.

On-going technical assistance and support will be available from the entire team, as needed in both supportive and advisory roles in the development and review of the plan updates, including the development of goals, objectives, and strategies for meeting identified transportation needs and service gaps. The cross-training that exists within the RLS team will ensure that WV DPT has access to the appropriate and most qualified individual for each task.

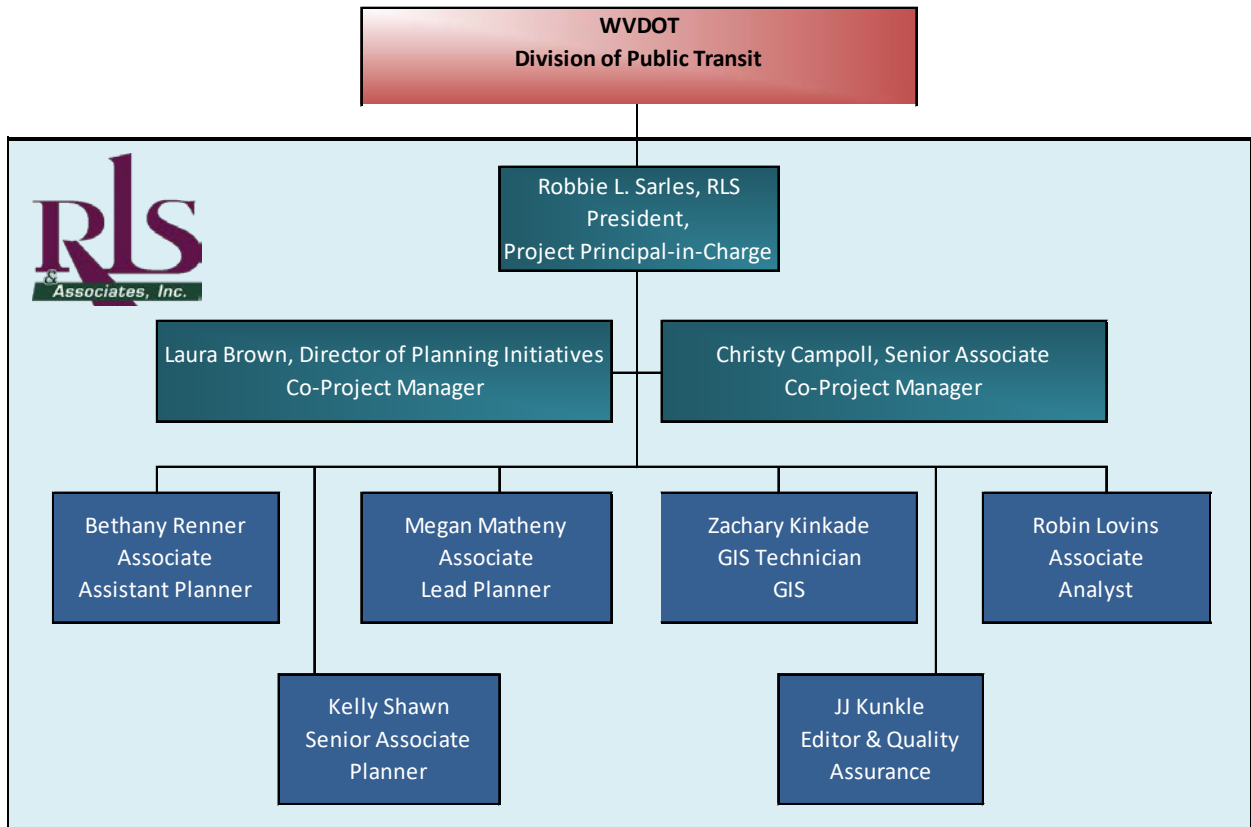
All team members have the expertise and time commitment required to make this plan a priority. Table 2 illustrates each team member's level of availability and, in preparation for the required scope of work, RLS has also projected the specific tasks on which each RLS team member will focus his or her efforts.

**Table 2: Level of Availability and Staff by Task**

<b>RLS Project Team Member</b>	<b>Availability Devoted to the Project</b>
Robbie Sarles	5%
Laura Brown	30%
Christy Campoll	30%
Megan Matheny	30%
Kelly Shawn	10%
Zach Kincade	25%
Bethany Renner	30%
Robin Lovins	20%
JJ Kunkle	20%

Table 3 provides a proposed project organizational chart for the RLS team.

**Table3: RLS Project Team Organizational Chart**



### STAFF QUALIFICATIONS

RLS is aware that a well-organized, clearly defined project management plan is critical to conducting the proposed work effort in an efficient, cost-effective manner. As such, RLS has assembled a project team made up of individuals that offer the depth, creativity, and experience necessary to meet project needs. The following is a brief description of the RLS Team’s experience and qualifications relevant to the proposed scope of work. Staff professional biographies are provided subsequent to the project team organizational chart. Complete resumes are provided after the RLS firm qualifications overview.

#### **Robbie L. Sarles, Principle-In-Charge**

For over 37 years, Ms. Sarles has worked in the public transportation field in both the public and private sectors in progressively responsible positions, culminating in the founding of RLS & Associates, Inc. in 1987. For much of that time, she has provided transportation management consulting services to public transit systems, paratransit systems, government agencies, and the private sector, working directly with senior level DOT staff, legislators, local elected officials to discuss

complex issues. Ms. Sarles has personally developed dozens of transit development and service plans and conducted hundreds of compliance reviews, both general and topic-specific for organizations and projects of all sizes, all over the country. Ms. Sarles' recent projects have included technical assistance to the New River Transit Authority, in Beckley, WV; the Trumbull County, Ohio Coordination Plan; the TCRP F-25 national research project, Improving the Safety, Health, and Productivity of Transit Operators Through Adequate Restroom Access; and Mobility Ohio, a project that will radically change how human service transportation is provided and funded in Ohio. Ms. Sarles has built a well-respected reputation for developing sound, practical solutions that are both realistic and implementable.

As RLS President, Ms. Sarles is the Principal-in-Charge of all RLS projects and, as such, is responsible for the projects from proposal inception and development to contract award and completion of the work. In the initial proposal phase, Ms. Sarles works closely with the assigned project manager, reviewing and approving all budgets and staffing assignments, and providing input into the proposal scopes of work. As projects are awarded, Ms. Sarles continues to work closely with the project manager, monitoring expenditures and the overall progress of the work to ensure that the clients' goals are met or exceeded. In addition to her Principal-in-Charge role, Ms. Sarles also serves as the project manager for several projects.

Ms. Sarles is the Principal-in-Charge for several State DOT technical assistance engagements, including those for the Indiana, Ohio, Massachusetts, New Hampshire, Tennessee, and Wisconsin Departments of Transportation as well as contracts for specified technical assistance for Georgia, Illinois, Nevada, and Oregon. Ms. Sarles has also provided technical assistance and training for several other Departments of Transportation including California, West Virginia, Alabama, New York, Michigan, Tennessee, and Virginia. Additionally, Ms. Sarles has conducted dozens of transportation development plans, compliance and/or management performance reviews, needs assessments, and marketing plans directly for a large number of transit systems. She is familiar with all aspects of public transportation services, including operations, management, personnel, budgets, administration, financial management, planning, recordkeeping, and service monitoring. Ms. Sarles received a Master's of Science in Civil Engineering and a Master's of City and Regional Planning from the Ohio State University in 1981. Her Bachelor of Science was received from Western Kentucky University.

#### **Laura Brown, Director of Planning Initiatives**

Ms. Brown is the proposed Co-Project Manager for this project. She brings a diverse background of over 20 years of transit planning experience supplemented with financial management experience. Ms. Brown currently directs RLS' Division of Planning Initiatives and in the past 15 years has managed, and/or contributed to several high-profile projects, with a focus on State, regional, and local coordinated transportation planning efforts. Ms. Brown is an experienced and highly regarded project manager, evidenced by these current and past successfully completed projects: Statewide and Regional Coordinated Transportation Plan Updates for West Virginia, Tennessee; Indiana, and New Hampshire; the KYOVA TMA Coordinated Transportation Plan and Updates; Regional

Coordinated Public Transit-Human Services Transportation Plan for Chicago Regional Transit Authority (RTA); Tennessee Department of Transportation Strategic Plan for Office of Mobility and Accessible Transportation; Coordinated Plan Update for Johnson City, TN; Coordinated Public Transit Human Services Transportation Plan Update for the Indianapolis region; Stark County/SARTA (Ohio) Area Regional Transportation Authority Coordinated Plan Update; Lake County, IL Paratransit Market Research Study; and Gloversville Transportation Plan for analysis of existing fixed route, intercity, and human services transportation productivity and development of recommendations to expand services and streamline the organizational structure.

For this project, Ms. Brown will be the Co-Project Manager for preparing and updating regional Coordinated Public Transit Human Services Transportation Plans and ensuring that all aspects of the plans are compliant with FTA regulations and meet the requirements set forth by the FAST Act regulations and the West Virginia DPT. Ms. Brown will also be available to provide technical assistance to the Division and local/regional coordination partners, as appropriate.

### **Christy Campoll, Senior Associate**

Ms. Campoll is the proposed Co-Project Manager for this project. A former transit manager, and transportation vice president, Ms. Campoll managed a successful rural, demand response transit system in central Indiana. As a strong project manager, Ms. Campoll is experienced in overall grants and transit management and operations. Ms. Campoll's responsibilities for RLS include providing input and support for local, regional, and statewide coordination plans, service evaluations, transit development plans, and comprehensive operational assessments.

Ms. Campoll's projects have included local, regional, and statewide coordination plans, service evaluations, transit development plans, comprehensive operational assessments, literature reviews, policy research, and compliance monitoring. One of her current roles is serving as Planner/Researcher for Mobility Ohio, a statewide initiative to align the elements of policy, funding, planning, and technology into a coordinated and enhanced mobility platform among state agencies funding human service transportation, including the implementation of pilot projects in a four-county region of southeast Ohio.

As Co-Project Manager for this project, Ms. Campoll will work with Ms. Brown to prepare updated coordination plans that fully comply with FTA requirements. Additionally, Ms. Campoll will offer technical assistance when needed to the Division and local/regional coordination partners. Ms. Campoll will be the primary point of contact for the Division to discuss the plan approach and deliverables. She will be supported by Ms. Brown in this function to ensure that the Division always has access to one of the Project Managers.

### **Megan Matheny, Associate**

Ms. Matheny is a seasoned director with over 12 years of experience in the public transportation industry. She has a proven track record addressing program efficiencies through analysis and revision

of organizational practices and procedures including, the introduction of innovative technology solutions and service delivery alternatives. Ms. Matheny brings the ability to effectively manage federal, state and local grants, operations, contracts, and a diverse range of projects and personnel within budget. An example is the implementation of a microtransit service through RideMICRO, a pilot program introducing on-demand service to un and underserved areas in the three counties. Ms. Matheny conducted research, secured grants for support, and managed technology enhancement projects. Her specialty is creating and executing planning initiatives and programs with an ability to adapt and deliver under changing environments. Ms. Matheny also bring a strong sense of organizational mission and aptitude to lead a team in meeting established goals and objectives. Ms. Matheny will be the lead on a portion of the regional Coordinated Plans.

#### **Kelly Shawn, Senior Associate**

Mr. Kelly Shawn is an experienced trainer, facilitator, and project manager, having worked with dozens of diverse community and tribal transit systems during his career. His experience with Medicaid, privately contracted, and intercity transportation services add to his impressive background and professional understanding of the transportation industry. Mr. Shawn's background includes solid experience in technical assistance, coordination, transit operations, and training, which when combined with his strong knowledge and background in rural and tribal transit, make him a versatile and effective project manager.

#### **Bethany Renner, Associate**

Ms. Bethany Renner works from the Dayton, OH Headquarters, having joined RLS & Associates, Inc. after years of work in charitable giving, community outreach, and project management. Bethany is a seasoned event manager, having coordinated events and outreach initiatives for a marketing firm, a public charter school, and an environmental advocacy organization. Since joining RLS, Ms. Renner provides compliance assessments for Title VI of the Civil Rights Act for Section 5311 systems, and conducts Section 5310 compliance assessments. Ms. Renner also supported development of three rural regional Coordinated Public Transit-Human Services Transportation Plans for Tennessee DOT.

#### **Zach Kincade, GIS Technician/Associate**

Mr. Kincade will provide GIS technical support in addition to research and public/stakeholder outreach. Mr. Kincade is an experienced project manager and lead analyst for survey analysis and supervises on-off ridership counts as part of service evaluations and transit development plans. Mr. Kincade is proficient in Microsoft Access and uses this database management application to organize RLS projects. In addition, Mr. Kincade provides technical support to RLS senior staff in the conduct of service evaluations and transit development plans, comprehensive operational analyses, coordinated human service and public transit plans, including public involvement activities and map development using ArcGIS to represent pockets of targeted populations in a specific study.

A sampling of Mr. Kincade's projects includes Project Manager, Greater Dayton RTA Performance Evaluations; Lead Supervisor, Jackson Area Transportation Authority, passenger survey; Project Manager, Greater Dayton RTA Title VI Analysis Update; Project Manager, Hancock, Hardin, Wyandot, and Putnam Community Action Commission Community Needs Assessment; Lead researcher, Greater Dayton RTA Title VI Study; Data Collection Administrator, Toledo Area RTA Title VI update; major contributor to the Lextran Title VI Study and Greater Dayton RTA U-Pass Feasibility Study; Project Manager, complete on-off count for Bloomington Transit; and Data Collection Manager for a ridership assessment/rider survey for Stark Area Regional Transit Authority (SARTA) in Canton, OH.

Mr. Kincade will be conducting all GIS-related tasks and providing survey assistance.

**Robin Lovins, Associate**

Ms. Lovins comes to RLS with over 22 years of experience as an Administrative Assistant in an office environment. Extensive office experience dealing with a diversity of professionals, clients and co-workers. An experienced Office Manager, Ms. Lovins is highly skilled in scheduling trainings, managing databases, webinar moderation, and has assumed major responsibilities with data management for RLS' RTAP projects, including the scheduling and serving as moderator of RLS virtual training modules.

# II. FORMS

# Forms

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Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

State of West Virginia  
 Centralized Request for Quote

<b>Proc Folder:</b> 1109820			<b>Reason for Modification:</b>
<b>Doc Description:</b> Coordination Plan for Public Transit Human Services			
<b>Proc Type:</b> Central Master Agreement			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2022-09-29	2022-10-13 13:30	CRFQ 0810 DMT2300000008	1

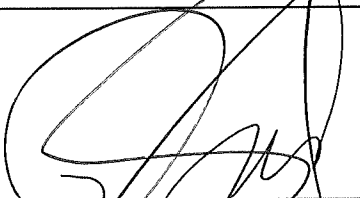
**BID RECEIVING LOCATION**

BID CLERK  
 DEPARTMENT OF ADMINISTRATION  
 PURCHASING DIVISION  
 2019 WASHINGTON ST E  
 CHARLESTON WV 25305  
 US

**VENDOR**

**Vendor Customer Code:** 172976  
**Vendor Name :** RLS & Associates, Inc.  
**Address :** 3131 S. Dixie Hwy, Suite 545  
**Street :**  
**City :** Dayton  
**State :** OH **Country :** USA **Zip :** 45439  
**Principal Contact :** Robbie Sarles  
**Vendor Contact Phone:** 937-299-5007 **Extension:**

**FOR INFORMATION CONTACT THE BUYER**  
 David H Pauline  
 304-558-0067  
 david.h.pauline@wv.gov

**Vendor Signature X**  **FEIN#** 31-1287821 **DATE** 10/3/2022

All offers subject to all terms and conditions contained in this solicitation

**DESIGNATED CONTACT:** Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Robbie Sarles, President

(Address) 3131 S. Dixie Hwy, Suite 545, Dayton, OH 45439

(Phone Number) / (Fax Number) 937-299-5007

(email address) rlsasc@rlsandassoc.com

**CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through WVOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

RLS & Associates, Inc.

(Company)

(Signature of Authorized Representative)

Robbie Sarles, President 10/3/2022

(Printed Name and Title of Authorized Representative) (Date)

937-299-5007

(Phone Number) (Fax Number)

rlsasc@rlsandassoc.com

(Email Address)

REQUEST FOR QUOTATION  
**Coordination Plan**

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8.2 The following remedies shall be available to Agency upon default.

8.2.8 Immediate cancellation of the Contract.

8.2.9 Immediate cancellation of one or more release orders issued under this Contract.

8.2.10 Any other remedies available in law or equity.

**9 MISCELLANEOUS:**

**9.1 No Substitutions:** Vendor shall supply only Contract Items submitted in response to the Solicitation unless a contract modification is approved in accordance with the provisions contained in this Contract.

**9.2 Vendor Supply:** Vendor must carry sufficient inventory of the Contract Items being offered to fulfill its obligations under this Contract. By signing its bid, Vendor certifies that it can supply the Contract Items contained in its bid response.

**9.3 Reports:** Vendor shall provide quarterly reports and annual summaries to the Agency showing the Agency's items purchased, quantities of items purchased, and total dollar value of the items purchased. Vendor shall also provide reports, upon request, showing the items purchased during the term of this Contract, the quantity purchased for each of those items, and the total value of purchases for each of those items. Failure to supply such reports may be grounds for cancellation of this Contract.

**9.4 Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

**Contract Manager:** Robbie Sarles  
**Telephone Number:** 937-299-5007  
**Fax Number:** \_\_\_\_\_  
**Email Address:** rlsasc@rlsandassoc.com

REQUEST FOR QUOTATION  
Coordination Plan

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**BID FORM #1**  
**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING**  
**DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The Primary Participant (applicant for an FTA grant or cooperative agreement, or potential contractor for a major third party contract),  
RLS & Associates, Inc. (COMPANY NAME) certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

If the primary participant (applicant for an FTA grant, or cooperative agreement, or potential third party contractor) is unable to certify to any of the statements in this certification, the participant shall attach an explanation to this certification.)

THE PRIMARY PARTICIPANT (APPLICANT FOR AN FTA GRANT OR COOPERATIVE AGREEMENT, OR POTENTIAL CONTRACTOR FOR A MAJOR THIRD PARTY CONTRACT),  
RLS & Associates, Inc., CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

  
\_\_\_\_\_  
Signature and Title of Authorized Official

President

REQUEST FOR QUOTATION  
Coordination Plan

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**BID FORM #2**  
**CERTIFICATION OF RESTRICTIONS ON LOBBYING**

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

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

2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions. [as amended by "Government Wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96). Note: Language in paragraph (2) herein has been modified in accordance with Section 10 of the Lobbying Disclosure Act of 1995 (P.L. 104-65, to be codified at 2 U.S.C. 1601, et seq.)]

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

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. [Note: Pursuant to 31 U.S.C. § 1352(c)(1)-(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such expenditure or failure.]

The Vendor, RLS & Associates, Inc., certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Vendor understands and agrees that the provisions of 31 U.S.C. § 3801, et seq., apply to this certification and disclosure, if any.

10/3/2022

Date

  
Authorized Signature

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFQ DMT23\*08**

**Instructions:** Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

**Acknowledgment:** I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

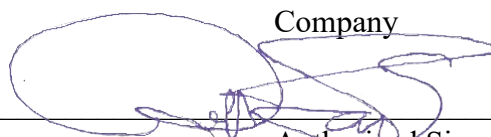
**Addendum Numbers Received:**

(Check the box next to each addendum received)

- |                                     |                |                          |                 |
|-------------------------------------|----------------|--------------------------|-----------------|
| <input checked="" type="checkbox"/> | Addendum No. 1 | <input type="checkbox"/> | Addendum No. 6  |
| <input type="checkbox"/>            | Addendum No. 2 | <input type="checkbox"/> | Addendum No. 7  |
| <input type="checkbox"/>            | Addendum No. 3 | <input type="checkbox"/> | Addendum No. 8  |
| <input type="checkbox"/>            | Addendum No. 4 | <input type="checkbox"/> | Addendum No. 9  |
| <input type="checkbox"/>            | Addendum No. 5 | <input type="checkbox"/> | Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

RLS & Associates, Inc.

\_\_\_\_\_  
Company  
  
\_\_\_\_\_  
Authorized Signature

10/12/2022

\_\_\_\_\_  
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

# Cost

### III. COST PROPOSAL & PRICING PAGE

Enclosed in this document is the cost proposal on Exhibit A Pricing Page that corresponds to the technical scope of work presented in the RFQ. The cost proposal as outlined on the following page presents the projected costs associated with each task. Associated expenses are also included.

Our proposed Grand Total Bid to complete the project is \$223,097.37.

#### Exhibit A Pricing Page Coordination Plans

Task	Description	Unit of Measure	Unit Price	# of Units	Extended Price
3.2.1	Develop Coordination Plans for 10 of the State's Planning and Development Regions	Cost of 1 Regional Plan / Report	\$13,960.39	10	\$139,603.88
3.2.2	Prepare Report and Make a Presentation as Directed by the Division	Presentation	\$3,697.40	1	\$3,697.40
3.2.3	Conduct Public Outreach Meetings / Activities in 10 Regions One Intial Meeting	One Outreach Meeting / Advertisement (ex. Radio, Newspaper , Web)	\$3,430.11	11	\$37,731.24
3.2.4	Conduct Public Outreach Meetings / Activities on 11 Regions, Follow-Up Meeting	One Followup Meeting / Advertisement (ex. Radion, Newspaper, Web)	\$1,710.43	11	\$18,814.78
3.2.5	50 Copies of the Regional Report (5 Copies of Each Report for the 10 Regions)	One Copy of A Report	\$28.90	50	\$1,444.79
3.3.5	Produce an Executive Summary of the 10 Regional Reports	Executive Summary	\$4,709.46	1	\$4,709.46
3.3.6	50 Copies of the Executive Summary	One Copy of Executive Summary	\$15.51	50	\$775.35
3.3.7	Technical Assistance to Regional Coordination Efforts	1 Hour	\$121.30	50	\$6,064.78
3.3.8	Technical Assisatance to MPO Coordination Project and / or Activities	Cost Per 1 hour	\$121.30	50	\$6,064.78
3.4	Initial Meeting and Progress Meetings (3 Meetings) with the Division of Public Transit	Cost Per one Meeting	\$1,396.97	3	\$4,190.90
	<b>Grand Total Bid</b>				<b>\$223,097.37</b>

#### IV. RLS EXPERIENCE AND TECHNICAL QUALIFICATIONS

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RLS specializes and works **exclusively in the transit industry**, providing consulting assistance to small, medium, and large public transit systems, Federal and State departments of transportation, government agencies, and paratransit operators. This woman-owned business enterprise was established in September 1987 and incorporated in 1990 in the State of Ohio and has grown to be a highly respected and sought-after consulting firm in the transit industry

today. Since its inception, RLS' mission has been to **“assist the transit community in identifying, facing, and meeting current and future challenges in an affordable, practical, and high-quality manner while maintaining the highest standard of integrity and professionalism.”** Within this mission, RLS has concentrated on improving public transportation system operations and administration through the use of sound financial management practices, the responsible use of capital resources, and quality customer service, believing that these are the core areas where the greatest contributions can be made and where the talents and resources of the firm can provide the greatest benefit. As a result, the RLS professional staff conducts projects across the country in many areas including:

- ◆ Compliance/Management Performance Reviews
- ◆ Transit Service Operations, Design, and Evaluation
- ◆ Financial Management and Cost Allocation
- ◆ Human Service Coordination, Mobility Management, and Paratransit Service Planning, Development, and Implementation
- ◆ Civil Rights—ADA, DBE, EEO, Title VI, and LEP
- ◆ Drug & Alcohol Regulations
- ◆ Effective Customer Service
- ◆ Governing Board Training and Assistance
- ◆ On-going Technical Assistance and Training to Meet the Specific Needs of State DOTs and Transit Systems
- ◆ Performance Measures and Monitoring and Risk Management
- ◆ Procurement and Third Party Contracting
- ◆ Program and Policy Development and Review
- ◆ Regulatory Compliance
- ◆ Rural Transit Assistance Program (RTAP) Management and Operations
- ◆ Safety Management Systems
- ◆ Strategic Planning
- ◆ Surveys and Data Collection
- ◆ Transit Asset Management
- ◆ Transit Technology and Facility Design



## WORK EXPERIENCE WITH THE FEDERAL TRANSIT ADMINISTRATION'S (FTA) GRANT PROGRAMS AND TRANSPORTATION COORDINATION PROJECTS

The following project summaries are examples of more than three years of work experience with the Federal Transit Administration's (FTA) grant programs and transportation coordination plans. The following summaries also demonstrate working experience with more than two other state departments of transportation in assisting them in complying with FTA's coordination requirements.

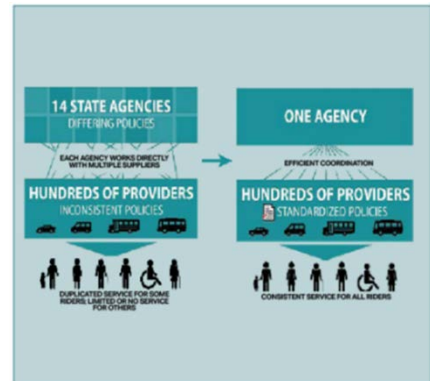
### **Mobility Ohio**

#### **Ohio Department of Transportation**

RLS is assisting the Ohio Department of Transportation (ODOT) as it leads a statewide consortium of state agencies in launching a streamlined, regional structure for human services transportation coordination (HSTC) in the year 2020 to optimize service provision.

The mobility transformation vision is of an enhanced mobility platform that aligns the elements of policies, funding, planning, and technology. The platform is grounded in extensive research that has uncovered new opportunities for productive inter-agency relationships resulting in the potential for limitless transportation options for Ohioans. Aspects of the inter-agency relationships

include cost-sharing strategies for administrative functions including insurance, driver standards, and background checks, vehicle standards, maintenance, software, ride-sharing, and more.



Timeframe: 2017 – Ongoing

Contact: Chuck Dyer, Administrator

Address: 1980 West Broad St., Mailstop 3110

City/State/Zip: Columbus, OH 43223

Phone: (614) 466-3718

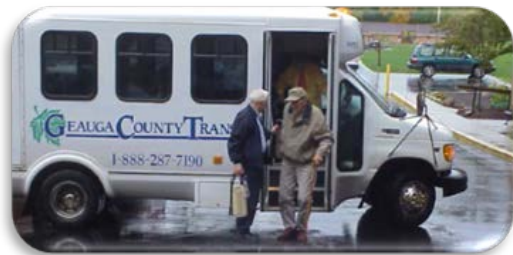
Email: [Chuck.Dyer@dot.ohio.gov](mailto:Chuck.Dyer@dot.ohio.gov)

Satisfactorily completed on time

### **Statewide and Regional Coordinated Public Transit-Human Services Coordinated Plans**

#### **Ohio Department of Transportation**

The Ohio Department of Transportation contracted with RLS to conduct this two-part project which includes: 1) the development of public transit regions for all of Ohio, and 2) developing and piloting the regionally developed coordinated plans for identified regions, to become the framework for the remaining regions. The framework will standardize the structure and content of these plans, facilitating regional and statewide coordination efforts. Project tasks include the following:



Part 1:

- 1) Human Service Transportation Agency Inventory and Regional Mapping Demonstration
- 2) Review of Regulations and Policies Affecting Statewide Coordination
- 3) Stakeholder and Public Outreach
- 4) Development of a Regional Coordination Steering Committee
- 5) Analysis of Findings and Recommended Regions
- 6) Presentation of Findings

Part 2:

- 1) Implement the Regional Framework
- 2) Create a Regionally Coordinated Plan and Template
- 3) Develop a Guide for the Creation and Implementation of a Regional Coordinated Plan
- 4) Recommendations for Regional Use of Technology

As part of the Statewide and Regional Coordination project underway in Ohio, RLS is providing technical assistance for an initiative in Ohio to review and restructure the way human service transportation dollars are managed within the state and increase the coordination between existing human services, public transit, and all transportation providers. RLS is helping to facilitate the work of fourteen state agencies in this project to standardize the fragmented delivery of human service transportation, including Medicaid-sponsored transportation, in established regions throughout the state.

Timeframe: 2016 – 2018

Contact: Chuck Dyer, Administrator

Address: 1980 West Broad St., Mailstop 3110

City/State/Zip: Columbus, OH 43223

Phone: (614) 466-3718

Email: [Chuck.Dyer@dot.ohio.gov](mailto:Chuck.Dyer@dot.ohio.gov)

Satisfactorily Completed on Time.

### **Mobility and Accessible Transportation Strategic Plan Development**

#### **Tennessee Department of Transportation (TDOT)**

The Tennessee Accessible Transportation and Mobility Act of 2020 opens doors to sustainable expansions and improvements in accessible transportation for communities and individuals throughout Tennessee. Tennessee Department of Transportation (TDOT) is poised to make the intentions of the Act a reality through the new Office of Accessible Transportation and a statewide mobility management program. The RLS team is assisting TDOT through this exciting transition. The scope of work includes RLS working with TDOT and its working group partners to create a mission statement, develop a 5-Year Strategic Mobility Plan, provide technical assistance through establishing inter-agency partnership agreements and comprehensive goals and objectives, and create annual reports for the new Office of Accessible Transportation.

The RLS team completed the Mobility Strategic Plan in 2022. The needs assessment and inventory processes involved a public survey, a series of regional focus groups, a transportation provider survey, statewide demographic analysis, inventory of existing transportation resources and providers, and working group meetings. Currently, RLS provides guidance and assistance to TDOT and the working group to implementation the plan's strategies.

Timeframe: 2020 – 2022

Contact: Jeannette Bloomfield

Address: James K. Polk Building, Suite 1800, 505 Deaderick Street

City/State/Zip: Nashville, TN 37243

Phone: (615) 741-3828

Email: [emily.ducach@tn.gov](mailto:emily.ducach@tn.gov)

Satisfactorily completed on time.

**Coordinated Public Transit-Human Services Transportation Plans**  
**Tennessee Department of Transportation (TDOT)**

RLS provided technical assistance to TDOT and local transportation stakeholders to lead the effort to complete coordinated public transit-human services transportation plans (CPT-HSTPs) for three multi-county regions in South Central, Southeast, and Southwest Tennessee. Each region included 8 to 12 counties. RLS conducted a planning process that identified potential Section 5310 grant requests and prioritized those projects with input from local stakeholders, including older adults and individuals with disabilities. Each region's CPT-HSTP contained: an assessment of available services that identifies current transportation providers (public, private, and nonprofit); an assessment of transportation needs for individuals with disabilities and seniors; strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery; and priorities for implementation based on resources, time, and feasibility for implementing specific strategies and/or activities identified. As part of the planning process, RLS also created a website where the public could access current status of the plan and learn about upcoming activities.

Timeframe: 2022 – On-going

Contact: Jeannette Bloomfield

Address: James K. Polk Building, Suite 1800, 505 Deaderick Street

City/State/Zip: Nashville, TN 37243

Phone: (615) 741-3828

Email: [emily.ducach@tn.gov](mailto:emily.ducach@tn.gov)

Current Project.

### **Indiana Regional Coordination Plans and Updates**

#### **Indiana Department of Transportation (INDOT)**

RLS updated the 11 multi-county Public Transit-Human Service Transportation Coordinated Plans for rural areas of Indiana, as well as the Coordinated Plan for the Central Indiana region, including the Indianapolis Urbanized Area. The updates included a statewide transportation needs survey; demographic analysis; inventories of all regions' public and human service transportation providers; one or more public and stakeholder input meetings in each region; and, the development of goals, strategies, action steps, budgets, and performance measures to address unmet transportation needs.



Timeframe: 2007-2008, 2011-2012, 2016-2017, 2020 – 2021

Contact: Todd Jennings

Address: 100 North Senate Ave, Room N901

City/State/Zip: Indianapolis, IN 46204

Phone: (317) 232-1483

Email: [TJennings@indot.in.gov](mailto:TJennings@indot.in.gov)

Satisfactorily completed on time.

### **Statewide Coordination of Community Transportation Services and On-Call Technical Assistance**

#### **New Hampshire Department of Transportation**

RLS worked with the New Hampshire Department of Transportation (NHDOT) Bureau of Rail and Transit to revise and rewrite a Statewide Coordination of Community Transportation Services Plan for New Hampshire. The State of New Hampshire developed its original plan, the 2006 Statewide Coordination of Community Services Plan, to implement statewide coordination of human service and community transportation. A resulting Executive Order created a Statewide Coordinating Council (SCC) that represents diverse groups in the transportation field. Members of the SCC represent state agencies, providers, consumers, planners and advocates. Significant portions of the 2006 statewide plan were implemented, including the formation of the SCC and nine Regional Coordination Councils (RCC), development of regional coordination plans, and implementation of new services and coordination efforts at the regional level using funding committed by the NHDOT. Other elements of the statewide plan were not implemented due to current fiscal and policy environments. RLS was hired in 2016 to work with the SCC and RCC to develop a new statewide coordination plan and evaluate and recommend a strategy for the State to further implement the plan. The Scope of Work involved an assessment of existing conditions; suggestions to improve and enhance transportation coordination; and stakeholder feedback.

Timeframe: 2016 – Ongoing

Contact: Fred Butler, Public Transportation Administrator

Address: 7 Hazen Dr., PO Box 483

City/State/Zip: Concord, NH 03302

Phone: (603) 271-2565

Email: [frederick.butler@dot.nh.gov](mailto:frederick.butler@dot.nh.gov)

Satisfactorily completed on time.

### **Human Service Transportation Regionalization Effects Study**

#### **Pennsylvania Department of Transportation**

The 2009 Human Service Transportation Coordination Study called for consideration of adopting a regional strategy, in part, for the Commonwealth. The report recognized the unique nature of each individual county system, but concluded, based on a six-county case study area, that savings and efficiencies in both administration and operations would be achieved. The report cites that an additional \$0.6 million in efficiency, representing an additional 3% in cost reductions, could be achieved through administrative consolidation and shifts to other modes (fixed-route and mileage reimbursement). Other contributing factors in these projected costs savings included some improved efficiency in the performance of call-takers and schedulers; increases in efficiency in passenger accounting and report (due to elimination of duplication). In 2017, RLS & Associates, Inc. was hired to examine whether or not this regionalization is workable in other portions of the state. Foremost among the items to be determined:

- ◆ Has the regionalization demonstration project generated cost savings?
- ◆ Has regionalization resulted in the administrative efficiencies cited in the human services transportation study?
- ◆ Has trip-making increased?
- ◆ Have the operational efficiencies associated with regionalization been realized?
- ◆ Are their unique characteristics about the original six-county study area that hinder or promote expansion of this concept to other areas?

Based on the financial analysis, the RLS team then analyzed all factors and determined what elements were instrumental in the success of the program and whether these elements could be transferred to other regions in Pennsylvania.

Timeframe: 2017 – 2019

Contact: Emily Adams

Address: Commonwealth Keystone Building, 400 North Street, 8th Floor

City/State/Zip: Harrisburg, PA 17120

Phone: (717) 787-8197

Email: [emadams@pa.gov](mailto:emadams@pa.gov)

Satisfactorily completed on time

### **South Carolina Intercity Bus Study**

#### **South Carolina Department of Transportation (SCDOT)**

RLS is reviewing the 2012 SCDOT Intercity Bus Study, and updating it taking into consideration Federal funding that was made available to Greyhound Lines and Southeastern Stages during the past four years. SCDOT/OPT followed the recommendations of the study and implemented a ICB program

that has utilized 100% of the 15% ICB set aside, which has resulted in spending approximately \$11 million on Section 5311(f) funds to purchase 20 over-the-road coaches for these two carriers. The study will also determine any gaps in ICB service across the State and evaluate if the current level of service is sufficient to meet the level of demand. If gaps exist, the study will determine the contributing factors and address if these factors can be addressed through the ICB program or are beyond the scope of the program. The level of investment will be determined to meet any lack of ICB coverage across the state.

Timeframe: 2017 – 2020

Contact: Curtis Sims

Address: 955 Park St, Room 201 PO Box 191

City/State/Zip: Columbia, SC 29202

Phone: (803) 737-0071

Email: [simsc@scdot.org](mailto:simsc@scdot.org)

Satisfactorily completed on time

### **LOCAL AND REGIONAL COORDINATION AND MOBILITY MANAGEMENT PLANNING FOR SECTION 5311, 5307, AND 5310 RECIPIENTS**

#### **Coordinated Public Transit-Human Services Transportation Plan**

##### **Johnson City Metropolitan Planning Organization**

RLS updated the Coordinated Public Transit-Human Services Transportation Plan for the Johnson City Urbanized area. Ultimately, the plan analyzed community transportation needs, inventoried the existing transportation services, and prioritized strategies for the urbanized area. The planning process and final document satisfied the Fixing America's Surface Transportation (FAST) Act requirements. Information for the plan was collected through comprehensive community outreach efforts and input from agencies and organizations that serve individuals with disabilities, older adults, people with low incomes, and the general public. The focus was on the Urbanized Area, and needs or gaps in services in the immediately surrounding communities was a secondary focus. A robust public input process targeted potential transit users to gain their insight into transportation needs and desires. A detailed report presented data to inform local stakeholders about gaps in access to services. RLS guided stakeholders through a prioritization process for future strategies and activities to meet the community's unmet transportation needs. All goals were fiscally responsible and work toward advancing coordinated services through a process that is realistic for the local community. RLS was joined in this effort by subconsultant LSC Transportation Consultants LLC.

Timeframe: 2021 – 2022

Contact: Mary Butler

Address: 137 W. Market Street

City/State/Zip: Johnson City, TN 37601

Phone: (423) 434-6277

Email: [marybutler@jcmppo.org](mailto:marybutler@jcmppo.org)

Satisfactorily completed on time

### **Section 5310 Program Administration Assistance**

#### **KYOVA Interstate Planning Commission**

KYOVA, along with the Tri-State Transit Authority (TTA), is responsible for the administration of the Section 5310 Program for the Transportation Management Area (TMA). RLS was hired to assist with the administration of the program by updating the applications for vehicles, technology, and mobility management. This project was an extension of the Coordinated Public Transit-Human Services Transportation Plan (HSTP) that RLS completed for the TMA. RLS focused on the development of a simplified application that would attract eligible applicants from all three states to apply for funds that support the goals identified in the HSTP. Aspects of the plan that were improved included strengthening the language about non-U.S. DOT funding that could be used as local matching funds for Section 5310. The plan also clarified potential mobility manager roles and responsibilities as well as opportunities for capital costs of contracting.

Timeframe: 2018 – 2021

Contact: Saleem Salameh, Technical Study Director / Deputy Executive Director

Address: 400 Third Ave

City/State/Zip: Huntington, WV 25712

Phone: (304) 523-7434

Email: [ssalameh@kyovaipc.org](mailto:ssalameh@kyovaipc.org)

Satisfactorily completed on time

### **Human Services Transportation Coordination Plan**

#### **Central Midlands Council of Governments**

The purpose of this project was to create a comprehensive strategy for the delivery of coordinated public and human service transportation services with the Central Midlands region. Plan development centered around significant stakeholder and public engagement through a variety of input gathering strategies. The planning process and final document satisfied the requirements of South Carolina Department of Transportation and comply with the Fixing America's Surface Transportation (FAST) Act.

Information for the Coordination Plan was collected by conducting comprehensive community outreach efforts and soliciting input from the agencies and organizations that serve individuals with disabilities, older adults, people with low incomes, and the general public. The RLS team conducted a detailed analysis of existing transportation providers and an assessment of temporal and spatial gaps in service, overlaid with a demographic and economic analysis of the geographical region. The team also prepared a detailed transportation funding analysis to document existing financing sources and an estimation of funding needs. Finally, the RLS team conducted a cost per ride analysis for human service agency transportation to reveal the true cost of current operations compared to potential cost and service efficiencies that could be achieved through coordination.

The RLS team also developed a reasonable range of strategies for transportation coordination in the Central Midlands region, service enhancements, and funding arrangements in cooperation with stakeholders and the public through a thoughtfully crafted planning and engagement process.

Drawing on the RLS team’s rich experience in public and human service transportation coordination plan development, the plan included several comparisons to coordination and service delivery in peer regions in order to provide CMCOG with realistic examples of success that could be modified and/or replicated for the Central Midlands region.

RLS was joined on this project by ForeSight Communication LLC. ForeSight Communication provided project outreach assistance and support with organizing focus group and public meetings.

Timeframe: 2019 – 2020

Contact: Reginald Simmons

Address: 236 Stoneridge Drive

City/State/Zip: Columbia, SC 29210

Phone: (803) 744-5133

Email: [rsimmons@centralmidlands.org](mailto:rsimmons@centralmidlands.org)

Satisfactorily completed on time

### **Coordinated Public Transit-Human Service Agency Transportation Plan Update**

#### **Regional Transportation Authority of Chicago**

The Chicago area Regional Transportation Authority is a co-designated recipient of the Section 5310 Program, and it shares that designation with the Illinois Department of Transportation (IDOT). The RTA is responsible for awards including eligible operating, mobility management, capital improvement, and associated administrative expenses. The RTA Program of Projects includes support for operations, mobility management, and administrative expenses.

The planning process included an assessment of existing transportation resources and the gaps or unmet needs that exist. RLS conducted a series of public and stakeholder focus groups, a public survey, and presented to the Project Advisory Committee (PAC) (made up of key stakeholder organizations) throughout the planning process. RLS also conducted a thorough analysis of existing transportation services to estimate temporal and spatial gaps in service across public, private, and human service agency options. Based on the assessment, the plan identified regional goals and strategies that specifically address coordinated transportation solutions for the identified needs. All goals and strategies were prioritized with input from PAC, and an implementation plan was developed and adopted by the RTA.

Timeframe: 2020

Contact: Heather Mullins

Address: 175 West Jackson Blvd

City/State/Zip: Chicago, IL 60604

Phone: (312) 913-3244



Email: [mullinsh@rtachicago.org](mailto:mullinsh@rtachicago.org)

Satisfactorily completed on time

### **Sunset Empire Transportation District (SETD) Coordinated Plan**

#### **Sunset Empire Transportation District (SETD)**

RLS & Associates, Inc. updated Sunset Empire Transportation District's (SETD) Coordinated Human Services Transportation Plan. The plan update's purpose was to identify the transportation needs of individuals with disabilities, older adults, and people with low incomes in Clatsop County, Oregon; provide strategies for meeting these needs; prioritize the strategies for funding and implementation; and, designing a multi-year implementation plan. The update to the Coordinated Plan built upon the existing successful arrangements currently place in Clatsop County and nearby areas, including the NW Connector transit agency alliance and SETD's partnerships with human service agencies serving clients with disabilities. This project involved several adaptations due to the COVID-19 pandemic. RLS conducted telephonic interviews with 11 community stakeholders and conducted three virtual input opportunities for community leaders, SETD riders, and the public: a project development workshop to identify potential coordinated transportation strategies, a goal and strategy refinement session, and a presentation of the draft plan to the SETD board of directors and transportation advisory committee.

Timeframe: 2020

Contact: Jeff Hazen

Address: 900 Marine Drive

City/State/Zip: Astoria, OR 97103

Phone: (503) 861-5399

Email: [jeff@ridethebus.org](mailto:jeff@ridethebus.org)

Satisfactorily completed on time

### **Human Services/Public Transit Coordinated Transportation Plan & Survey**

#### **Stark Area Regional Transit Authority (SARTA)**

RLS & Associates, Inc. along with CJI Research Corporation will help the Stark Area Regional Transit Authority (SARTA) design and conduct an onboard Transportation Needs survey and update the Human Services/Public Transit Coordinated Transportation Plan. Ultimately, this project will result in an analysis of community transportation needs and an updated coordinated public transit-human services transportation plan for the SARTA service area. The planning process and final document will satisfy the requirements of the Ohio Department of Transportation and comply with the Fixing America's Surface Transportation (FAST) Act.

Satisfactorily completed on time

Timeframe: 2018 – 2019

Contact: Latrice Virola

Address: 1600 Gateway Blvd. SE

City/State/Zip: Canton, OH 44707

Phone: (330) 477-2782

Email: [lvirola@sartaonline.com](mailto:lvirola@sartaonline.com)

### **Coordinated Transportation Plan Update**

#### **Hancock Hardin Wyandot Putnam Community Action Commission, Ohio**

RLS developed the Coordinated Public Transit-Human Services Transportation Plan Update building on past efforts and revisiting the initial evaluation of county and local community characteristics, including a stakeholder assessment and inventory of existing transportation services in each county, updating both of these items as required. Further, RLS conducted a Comprehensive Needs Assessment (CNA). The purpose of the CNA was to conduct a demographic analysis, surveys of both the Low-Moderate Income population and social service agencies, research on current trends in economic and political factors affecting the Low-Moderate Income (LMI) population, and conduct an analysis of existing studies done by other community organizations, and ultimately, identification of gaps in services provided to the LMI population in Hancock, Hardin, Wyandot, and Putnam Counties.

Timeframe: 2017

Contact: Erin Rodabaugh-Gallegos

Address: 122 Jefferson St., PO Box 179

City/State/Zip: Findlay, OH 45839

Phone: (419) 423-3755

Email: [erodabaughgallegos@hwpcac.com](mailto:erodabaughgallegos@hwpcac.com)

Satisfactorily Completed on Time.

### **Yankton Transit Coordinated Public Transit-Human Services Transportation Plan**

#### **Yankton Transit (Section 5311 Recipient)**

The Coordinated Public Transit-Human Services Transportation Plan replaces a previous incomplete plan and includes all aspects required of a Coordination Plan. The work plan included an assessment of all human service and transportation providers within the city and adjacent communities, and identifies gaps in service by determining needs of persons with disabilities, older adults, and low income persons. Through public surveys and stakeholder interviews, RLS determined strategies for coordination, system structure and methods of creating greater efficiencies. Extensive outreach efforts and demographic analysis were the basis for a detailed transportation needs assessment. Outreach efforts included public surveys, stakeholder interviews, local public meetings and workshops to gain community input. The plan will serve as a tool for educating and informing Yankton Transit stakeholders and leaders about the transportation needs and resources of the City and neighboring communities. And, by identifying these needs and resources, the plan provided a guide for the City to successfully address these needs in the future. Finally, the project resulted in strategies, ranked by priority, for applications to the Federal Transit Administration (FTA) for MAP-21 project funds.

Timeframe: July 2013 – December 2013

Contact: Ron Baumgart

Address: 901 East 7<sup>th</sup> Street

City/State/Zip: Yankton, SD 57078

Phone: (605) 945-2360

Email: [ron.rct@midconetwork.com](mailto:ron.rct@midconetwork.com)

Satisfactorily Completed on Time.

**Randolph/Montgomery Counties Community Connectivity Plan (CCP)**  
**Regional Coordinated Area Transportation System (RCATS)**

RLS & Associates, Inc. (RLS) is developing a Community Connectivity Plan (CCP) for the Regional Coordinated Area Transportation System (RCATS). An issue that will be important to address within the five-year plan is to increase the transit system capacity to reach more people and destinations throughout the region in the most efficient and effective way. There is an immediate need now to serve additional people. The current and projected regional mobility needs and changes are analyzed and addressed in the conclusions and recommendations. The Final Plan will include recommended strategies to address the goal of increased ridership, a 5-Year Capital and Operating Plan, and recommended performance measures. This plan is an update to the 2011 Plan previously conducted by RLS.

Timeframe: 2017 – 2018

Contact: Roger King, Transportation Director

Address: 347-B West Salisbury Street

City/State/Zip: Asheboro, NC 27203

Phone: (336) 629-7433

Email: [rcats@triad.rr.com](mailto:rcats@triad.rr.com)

Satisfactorily completed on time

**RELEVANT EXPERIENCE WITH WEST VIRGINIA DIVISION OF PUBLIC TRANSIT**

**Coordinated Public Transit-Human Services Transportation Plan Updates**  
**West Virginia Department of Transportation**

The West Virginia Department of Transportation, Division of Public Transit secured the services of RLS to update Coordinated Public Transit-Human Services Transportation Plans for 11 multi-county regions across the state. The plans meet requirements of the Federal Transit Administration's (FTA) Section 5310 grant program for the State's 11 planning and development regions which are to: assist FTA Section 5311 and 5307 recipients to coordinate to the maximum extent feasible; to assist Metropolitan Planning Organizations with coordination efforts; and to provide technical assistance to organizations in the area of coordination; and document and prioritize over a specific period all potential Section 5310 projects. The planning process involved extensive public outreach efforts, statewide. It also involved multiple local public and stakeholder meetings and public surveys in each region to gain an assessment of current unmet transportation needs and gaps in services, especially for older adults, individuals with disabilities, and people with low incomes, but also for the general public. In addition, RLS conducted an in-depth analysis of existing public, private,



and human service agency transportation resources. All identified needs/gaps in transportation and existing transportation resources were summarized in a draft report. Next, local stakeholders identified coordinated transportation planning priorities to be implemented over the next four years. RLS documented the goals, priorities, and strategies into a final, locally developed plan. All plans were adopted at the local level.

Highlights from this statewide study included:

- ◆ Multi-county/regional coordination in rural and small urban areas;
- ◆ Basic computation of the actual fully allocated cost per trip for each participating human service agency, senior program, and public transit provider;
- ◆ Development of a range of coordinated transportation strategies including but not limited to the following:
  - Public-human service agency trip sharing;
  - Joint use of vehicles;
  - Joint procurement;
  - Bulk fuel purchasing agreements;
  - Coordinated trips with local universities and major employers;
  - Regional/multi-county mobility management programs;
  - Carpools/Vanpools;
  - Taxi-voucher programs;
  - Coordinated training programs;
  - Centralized call centers and scheduling centers;
  - Coordination with private sector providers (i.e., voucher programs).

Timeframe: 2010-2012, 2014-2015, and 2018-2021

Contact: William C. "Bill" Robinson, Executive Director

Address: 1900 Kanawha Blvd., Building 5, Room 906

City/State/Zip: Charleston, WV 25305

Phone: (304) 558-0428

Email: [Bill.C.Robinson@wv.gov](mailto:Bill.C.Robinson@wv.gov)

Satisfactorily Completed on Time.

### **Bluefield Area Transit Route Planning**

#### **West Virginia Department of Transportation**

RLS conducted an evaluation of Bluefield Area Transit's deviated fixed routes as the agency constructed a new passenger facility in downtown Bluefield, WV. The move to the new facility required that some of the systems' routes be altered. RLS conducted a productivity evaluation of routes serving Bluefield based on on/off counts, a customer survey, and stakeholder interviews to inform the redesign of the Bluefield-based route network. Bluefield Area Transit is a Section 5311-funded rural transit system serving Mercer and McDowell Counties, West Virginia. West Virginia DOT contracted with RLS to provide this planning study to the transit agency.

Timeframe: 2021

Contact: William C. "Bill" Robinson, Executive Director

Address: 1900 Kanawha Blvd., Building 5, Room 906

City/State/Zip: Charleston, WV 25305

Phone: (304) 558-0428

Email: [Bill.C.Robinson@wv.gov](mailto:Bill.C.Robinson@wv.gov)

Satisfactorily Completed on Time.

### **Tri-River Transit Transition Assistance**

#### **West Virginia Department of Transportation (WVDOT)**

RLS & Associates, Inc. provided technical assistance to Tri-River Transit for the regional coordination of services now provided separately by Wayne Xpress and Tri-River Transit. The DOT requested this assistance to ensure the cost effective and efficient transition of service and expansion of available service within the three-county region. RLS coordinated with the DPT, Tri-River Transit, and Wayne Xpress to document the existing transportation services provided by Wayne Xpress and develop a list of tasks to be completed for the transition of services to Tri-River. Next, RLS worked directly with Tri-River Transit on-site to develop a transition plan and schedule for the transition of services. RLS continued to participate in meetings as needed, for example, Board Meetings for Tri-River and Wayne Xpress, meetings with the Secretary of State, Aging Services, etc. to prepare for the coordination and transition of services. Finally, RLS developed new and/or updated policies and an incremental and comprehensive service budget; assessed staff needs and assisted with completing the new hire process, including the development of job descriptions; coordinated with Aging Services for the transfer of vehicles, including the conduct of a vehicle inventory and inspections; prepared media releases for Wayne Xpress, Tri-River, and the DPT; participated in meetings and assist in the renegotiation of contracts for Medicaid, Developmental Disabilities, and Autism contract services; and other activities and tasks, as needed and/or directed by the DPT.

Timeframe: 2016

Contact: Bill Robinson

Address: 1900 Kanawha Blvd., Building 5, Room 906

City/State/Zip: Charleston, WV 25305

Phone: (304) 558-0428

Email: [Bill.C.Robinson@wv.gov](mailto:Bill.C.Robinson@wv.gov)

Satisfactorily Completed on Time.

### **Development of a Coordination Toolkit and Coordination Plan Template**

#### **West Virginia Department of Transportation (WVDOT)**

RLS & Associates, Inc. developed "It's Time to Coordinate," a user friendly guide to coordination and compilation of best practices for the West Virginia DOT/Division of Public Transit. The toolkit was not developed to duplicate or present existing information in a new way, rather the Toolkit's sections on "Frequently Asked Questions" and "Getting Started" together with a list of websites and reference materials were compiled to present the best of information available on transportation coordination that has been developed over the past thirty years in such a way that transportation systems, planning agencies, human service organizations and virtually anyone with an interest in coordination can use the Toolkit as a guide to implement transportation coordination.

In addition, RLS developed instructions and a template for a Coordinated Public Transit-Human Services Transportation Plan. This document, along with several accompanying forms and tables which have been provided, will assist communities in meeting the SAFETEA-LU requirements for a locally developed coordination plan that is now a condition of funding under the Federal Transit Administration's Elderly Individuals and Individuals with Disabilities (Section 5310), Job Access and Reverse Commute (JARC) (Section 5316), and New Freedom Initiative (Section 5317) grant programs. A template was also developed to assist communities with providing periodic updates of their plans.

Timeframe: 2006

Contact: Bill Robinson, WVDOT/DPT

Address: 1900 Kanawha Blvd., Building 5, Room 906

City/State/Zip: Charleston, WV 25305

Phone: (304) 558-0428

Email: [Bill.C.Robinson@wv.gov](mailto:Bill.C.Robinson@wv.gov)

Satisfactorily Completed on Time.

## V. PROJECT UNDERSTANDING, APPROACH, AND SCOPE

### UNDERSTANDING

RLS understands that the West Virginia Department of Transportation (WVDOT), Division of Public Transit (WVDPT) has initiated this work effort to update coordination plans that meet the requirements of the FAST Act, and Federal Transit Administration's (FTA) Section 5310 grant program. This will be accomplished by conducting extensive planning efforts for 10 of West Virginia's planning and development regions. The goal of each plan is to identify the transportation needs of individuals with disabilities, older adults, and people with low incomes, provide strategies for meeting these needs, and prioritize transportation services for funding and implementation. In addition, the successful proposer will be expected to assist FTA Sections 5311 and 5307 recipients to coordinate to the maximum extent feasible; to assist Metropolitan Planning Organizations (MPOs) with coordination efforts, as requested; and to provide technical assistance to organizations in the area of coordination, including but not limited to the WVDOT/DPT and the West Virginia Transportation Coordinating Council (TCC). The ultimate project goal is to encourage and facilitate the coordination of transportation services to the maximum extent practicable and ensure compliance of locally developed public transit human services coordination plans with the requirements developed by the Federal transit Administration. All plans will be compliant with requirements of MAP-21, the FAST Act, the Infrastructure Investment and Jobs Act (IIJA), and any subsequent reauthorizations of the Federal Transit Program. The proposed approach below will satisfy those requirements.

### APPROACH

The tasks included in the project approach are primarily focused on the development of coordination plans for 10 of the State's 11 Planning and Development (P&D) Regions. If selected for this project, RLS will coordinate the steps involved in each plan with the WVDPT project manager, and, in areas near or including Metropolitan Planning Organizations (MPOs), RLS will also coordinate schedules and activities with the plans and schedules of the respective MPOs. Each of the regional planning efforts will consist of two public and stakeholder meetings as well as stakeholder surveys and interviews. Draft and final coordinated plan updates will be developed for each region and summarized in an Executive Summary. RLS will also prepare a report and presentation as directed by the Division for each year of the contract on the plan, coordination activities, and any other information pertinent to advancing coordination activities in West Virginia. RLS' approach is more fully described in the following Scope of Work.

### SCOPE OF WORK

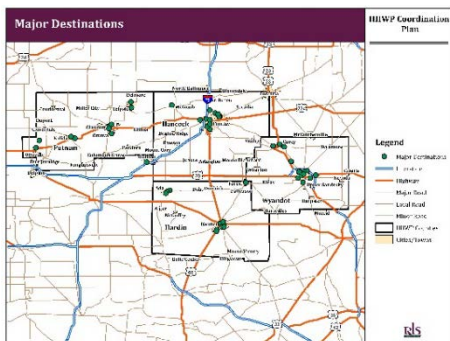
**Task A. Develop Coordination Plan Updates for 10 Planning and Development (P&D) Regions (Corresponds to Pricing Page, 3.2.1).** RLS will conduct planning efforts and update existing coordinated plans for 10 P&D regions. Planning efforts will include two meetings in each region—

one initial meeting will be the in-depth discussion about unmet transportation needs and potential goals and strategies to address those needs and one follow-up meeting to prioritize the identified strategies—stakeholder interviews and on-line survey to conduct a thorough assessment and analysis of existing transportation services; demographics analysis, and documentation of identified needs and prioritized strategies to meet those needs. Meetings will involve participation from older adults, individuals with disabilities, people with low incomes, and the general public. Draft plans will be submitted to the WVDPT and distributed to regional stakeholders for review and input. Final plans will be provided to each P&D region for approval and adoption by the appropriate entity. RLS will provide sample processes for approval and adoption of the final plans and for future plan updates. Each of the following subtasks describes the major steps required for completion of the plan update.

**Subtask A.1. Assessment of Transportation Needs and Existing Transportation Services and Coordination (Corresponds to Pricing Page, 3.2.3).** The RLS proposes to conduct two on-line surveys to assess 1) regional transportation needs, and 2) to collect updated data from transportation providers and key stakeholder organizations.

**Subtask A.1.2. On-line Survey (Corresponds to Pricing Page, 3.2.3).** With WVDPT’s input, RLS will prepare a general **public transportation needs survey** specifically for West Virginia and its subrecipients. Surveys will be distributed on-line and in printed paper formats. Employing a combination of the following strategies will make survey distribution in rural areas most effective:

- ◆ Advertising on social media (i.e., Facebook) and in newspapers and newsletters.
- ◆ Making printed, paper-surveys available to local stakeholders upon request.
- ◆ Placing a link to the on-line survey on agency and local government websites, in organizational or church/faith-based organization newsletters, and in utility bills.
- ◆ Distributing the survey link by email to consumers, students, peer agencies, and/or staff of stakeholders.
- ◆ Each of the above noted approaches to distributing the survey will be included in each plan update. RLS will begin distribution of the survey during the stakeholder workshops (Task A.2).
- ◆ Given approval, RLS would include a small incentive for completing the survey, such as a raffle entry.



**Subtask A.1.3. Assessment of Existing Transportation Services and Coordination (Corresponds to Pricing Page, 3.2.1).** Next, the RLS team will create an on-line survey and distribute it to existing public, private, and human service transportation providers to update the operational profile of their services. RLS will collect detailed data on a variety of topics, including but not necessarily limited to: inventory of the existing vehicle fleet for all identified services; vehicle use information, operating hours, miles, and passenger trips

(pre- and post-COVID); operating and capital expenses and revenues—by funding source and program; support services, such as maintenance and dispatching/scheduling; organizational structures of the services; passenger trip origins and destinations (or the major trip



origins/destinations); and scheduling and dispatching procedures. RLS will follow-up with providers to clarify survey responses and/or collect additional data.

Maps of the service areas for various transportation providers will be overlaid on the **employment/job centers**. Maps will be supported by tables that identify the passenger eligibility requirements and hours/days of operation for the service providers. These maps and tables will identify the **spatial and temporal gaps** for analysis between existing transportation resources and employment/job centers.

**Subtask A.2. Assessment of Transportation Needs**

**(Corresponds to Pricing Page, 3.2.2).** RLS will analyze the information compiled through the previous subtasks into a summary of unmet transportation needs and gaps in services for individuals with disabilities and older adults.

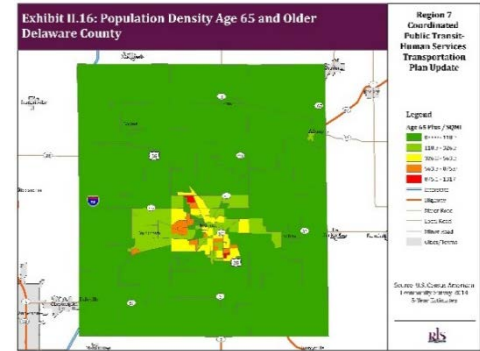
**Subtask A.3. Conduct One Initial and One Following Public Outreach Meeting in All 11 Regions**

**(Corresponds to Pricing Page, 3.2.3 and 3.2.4).** Three two-person teams led by experienced RLS senior team members will facilitate and document a total of two public outreach meetings per region. Key stakeholders to be invited from each county include, but are not limited to representatives from State agencies that use State or Federal funds to support transportation; individuals with disabilities; older adults; local directors and program managers from agencies that serve older adults and/or individuals with disabilities; WVDPT representatives; public, private, and non-profit transportation programs; school districts; health care; and local government representatives. Provided below are possible public outreach methods to draw awareness of the meetings:

- ◆ E-Fliers
  - Distributed by local community organizations to their email lists and/or social media accounts
  - Distributed by local media groups to their subscribers via email and/or social media accounts
  - Shared as a Facebook ad
- ◆ Fliers
  - Placed in high traffic locations (locations may vary with the season)
  - Included in newspapers
- ◆ Vocal Announcements
  - Shared on the radio
  - Given by community organizations to their members
  - Announced at City Council and City Planning Commission meetings

Discussions at the meeting will include topics about the identified spatial and temporal gaps in services, opportunities, and priorities for addressing the identified gaps through coordinated transportation. Furthermore, the stakeholders will be asked to share their concerns about the challenges to coordinating services. Challenges may range from funding limitation to local agency policy or insurance restrictions. RLS will research the challenges and provide resources for peer communities that have also overcome similar challenges. All issues will be discussed during the second round of meetings. A summary of these meetings will be included in the draft and final plans.

**Subtask A.4. Demographic Analysis (Corresponds with Pricing Page, 3.2.1).** The demographic and socio-economic variables related to transit demand will be compiled and their densities computed for each county, census tract, and/or block group. The data will be displayed using graphs, tables, and maps that will have accompanying descriptions to understand the profiles of each county as well as the State as a whole. The data will be compiled from the most current census data, including the American Community Survey. Variables will include:



- ◆ Persons 65 and over.
- ◆ Individuals with disabilities.
- ◆ Zero vehicles households.
- ◆ Race.
- ◆ Households below the poverty level.

Working cooperatively with existing transportation service providers, a sample of completed trips will be collected for purposes of identifying major trip generators served by all the local public, private, and non-profit transportation providers, even if those destinations are outside of the provider service areas.

It is crucial to complete an accurate listing and maps of major trip origins and destinations for participating transportation providers. Common destinations, such as major employers, veteran’s services locations, military installations, and medical facilities will also be included in the analysis even if they are not currently served by the participating agencies.

At the conclusion of the public involvement process, RLS will prepare and present a draft report for the WVDPT. The report will identify needs that could be addressed through Mobility Management strategies and strategies that are developed based on resources from multiple program sources. Examples of Mobility Management strategies include, but are not limited to, hiring or designating a Mobility Manger or implementing service changes such as shared trips, changes in service area boundaries, shared grant or program management, coordinated or consolidated scheduling, or shared maintenance. Challenges with inter-agency coordination will be addressed.

**Subtask A.5. Develop an Implementation Plan (Corresponds with Pricing Page, 3.2.1).**

Realizing that coordination can offer better resource management strategies to improve the performance of diverse individual transportation services, as well as overall mobility throughout the State, a complete range of potential and realistic solutions to gaps in services, unmet needs, and major challenges identified in the previous subtasks will be

2016-2017 Need/Gap	2016-2017 Priority Level	Corresponding Goal (Chapter V)
Lack of transportation is one of the most common challenges for the Community Mental Health to serve its consumers.	High	#1, #4, #6
Parke County needs public transportation services for the general public.	High	#1, #4
The Amish community needs transportation options. Currently, individuals transport the Amish, but the fee for a ride is high.	Moderate	#1, #2
Vermillion County may need more transportation, but the geography and lack of trip generators makes it difficult to provide affordable and productive service.	Moderate to Low	#1
Burnett Manor is an apartment complex in Parke County. It is likely that WEIDC and the complex could coordinate efforts to improve transportation options there. But, to date, there has been no response from Manor staff or residents when WEIDC attempts to assess trip demand.	Moderate to Low	#3, #5

explored for feasibility and effectiveness. The strategies will include a description of the identified transportation gaps and needs that are addressed; the service improvement opportunities, by provider; prioritization and feasibility of implementation; responsibility for implementation; potential costs and funding resources; suggested implementation timeframe; maps of potential projects/improvements; and, performance measures. Strategies will include both general transportation goals and strategies to address specific transportation needs such as extending evening service hours. Also, RLS will provide a summary table to match each identified goal with its corresponding need that it will address and the level of priority should receive. The implementation timeframe may be different from the priority level where funding limitations or other preliminary steps are required before implementation can occur.

**Subtask A.6. Finalization of the Plan (Corresponds with Pricing Page, 3.2.1).** Once all tasks, goals, and objectives have been met and agreed upon by the WVDPT, RLS will finalize the overall written plan that addresses structures for current and projected needs and includes performance measures. The plan will be provided in a format that can be used for future funding, planning coordination, and implementation efforts. RLS will develop a standard adoption and approval form with instructions for use. Securing commitment from a diverse group of state, Federal, and local programs and funding options for coordinated transportation is not only critical but essential to the future and success of transportation in West Virginia and throughout the United States. The formal adoption and approval process will be the important final step marking the end of the planning process and the beginning of implementation. Organizations that adopt the plan will also agree to actively participate in implementation of coordinated transportation strategies.

**Task A Deliverables:** Twenty meetings for 10 regions (including MPOs that are located within P&D regions; all meeting materials including fliers, agendas, etc.; demographic and gap analyses; draft and final implementation plans.

**Task B. Produce 11 Regional Reports (Corresponds to Pricing Page, 3.2.5).** After completion of Task A and the formal adoption and approval process has been completed, RLS will produce five copies of each regional report, for a total of 50 copies, each with a full-color cover.

**Task B Deliverables:** Five (5) copies of each regional report, total of fifty copies, each with a full-color cover.

**Task C. Executive Summary (Corresponds to Pricing Page, 3.3.5).** RLS will develop an Executive Summary that includes at a minimum, the recommended projects and goals for each of the 10 regions and the MPO areas within the P&D regions. The Executive Summary cover will be produced in full color. Thirty (30) copies of the Executive Summary will be provided to the Division.

**Task C Deliverables:** Fifty copies of the Executive Summary with full-color cover.

**Task D. Prepare a Report and Make Presentation as Directed by the Division (Corresponds to Pricing Page, 3.2.2).** Following completion of the 10 regional updates, RLS will prepare a report that includes recommendations, an assessment of the progress of coordination in each region, and identified best coordination practices by region. This report will be presented to the WVDPT and other organizations as directed by the Division.

**Task D Deliverables:** Report and PowerPoint for the WVDPT and other parties as directed.

**Task E. Provide Technical Assistance to Regional Coordination Efforts (Corresponds to Pricing Page, 3.3.7).** RLS will, at WVDPT's request, provide coordination assistance to P&D regions or transit providers. Activities included in this assistance might consist of assisting in the development of a local transportation coordinating committee, assisting with and attending an initial coordination meeting, facilitating discussions about ride-sharing or cost allocation, recommending coordinated transportation service changes or new modes of service, etc. Assistance will potentially be conducted via e-mail, telephone, or video conference. In addition, up to three (3) on-site meetings per region will be included in the assistance.

**Task E Deliverables:** Technical assistance.

**Task F. Provide Technical Assistance to the Division of Public Transit (WVDPT) or Metropolitan Planning Organization (MPO) Coordination Activity; Serve as Resource to Local Agencies (Corresponds to Pricing Page, 3.3.8).** RLS will, at WVDPT's request, provide coordination assistance to the WVDPT, WVTCC, and or as part of an MPO coordination activity. RLS will also provide technical assistance to local agencies in the update of a coordination plan during the interim period.

**Task F Deliverables:** Technical assistance.

**Task G. WVDPT Meetings and Monthly Progress Reports (Corresponds with Pricing Page, 3.42).** Following Notice to Proceed, RLS will participate in the project kick-off meeting at the WVDPT headquarters located in Building 5, Room 650, 1900 Kanawha Boulevard, E., in Charleston, WV. In addition, RLS will attend a minimum of two additional progress meetings (three meetings total) at WVDPT offices; dates for all meetings are to be set by the mutual agreement of the WVDPT and RLS. RLS understands that these meetings can also be combined with other local meetings, e.g., a WVDPT workshop, training, or conference. For the duration of the contract, RLS will provide monthly progress reports to the WVDPT by the 15<sup>th</sup> of each month describing, at minimum, the principal project activities performed the preceding month.

**Task G Deliverables:** Attendance at the kick-off meeting and two progress meetings; monthly written reports.

All task materials developed by RLS for this project will be provided to the WVDPT in PDF format

## VI. PROJECT TIMELINE

The proposed project timeline delineates the time and level of work effort to complete the activities as described. Each activity in the timeline can be negotiated to meet WVDPT’s schedule, workload, or deadlines as set by the Federal Transit Administration, the state of West Virginia, or other entities. We propose to complete all tasks within one-year of notice to proceed. Due to RLS’ location in close proximity to West Virginia and the depth of experience and knowledge of the RLS team, many of the tasks encompassed in this project will be completed simultaneously.

**Table 3: Project Timeline**

No.	Scope of Work Activities	NTP	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
3.4	Kick Off Meeting	#	X											
3.2.1	Develop 10 Regional Public Transit Human Service Plans/Updates		[Green bar spanning Months 1-10]											
3.2.3	Conduct Public Outreach Meetings/Activities in 10 Regions, Initial Meeting						[Green bar spanning Months 5-6]							
3.2.4	Conduct Public Outreach Meetings/Activities in 10 regions, Follow-up Meetings									[Green bar spanning Months 8-9]				
3.2.5	Produce 10 Regional Reports											[Green bar spanning Months 10-11]		
3.3.5	Produce an Executive Summary of the 10 Regional Reports												[Green bar spanning Months 11-12]	
3.3.6	50 Copies of the Executive Summary													[Green bar in Month 12]
3.2.2	Prepare Report and Make Presentation as Directed to the Division		[Green bar spanning Months 1-12]											
3.3.7	TA to Two Regional Coordination Efforts		[Green bar spanning Months 1-12]											
3.3.8	TA to Division or MPO Coordination Project and Activity		[Green bar spanning Months 1-12]											
3.4	Progress Meetings (3 Meetings) & Monthly Progress Reports		*	*	X *	*	*	*	*	X *	*	*	*	* X

- This symbol designates the tentative date for the presentation to the DPT
- \* This symbol designates the monthly status or progress reports submitted to the DPT
- X This symbol designates a tentative meeting date with DPT



Ms. Robbie Sarles is the Founder and President of RLS & Associates, Inc. (RLS), a transit consulting firm in Dayton, Ohio specializing in the provision of technical assistance to rural and urban transit systems, Federal agencies, and State DOTs. With over 40 years of experience in transit operations, management, and training, she is a national expert for FTA's D&A Testing Regulations and a highly regarded and sought after trainer on a variety of topics, including local, regional, and Statewide coordination, D&A Regulations and Reasonable Suspicion Training, Civil Rights, ADA, diversity, and workplace harassment. Ms. Sarles was the primary author of coordinated transportation handbooks for Ohio, Minnesota, and West Virginia and currently leads Mobility Ohio, a vision to align the elements of policies, funding, planning, and technology into Statewide coordinated transportation, a project that has attracted FTA leadership's attention. She is currently leading the testing of this alignment vision in two Ohio pilot areas. Finally, Ms. Sarles is the Project Manager for the FTA Comprehensive Oversight Review and Technical Assistance Program (CORTAP).

## ROBBIE L. SARLES

*President*

### EDUCATION

- ◆ M.S., Transportation Engineering, The Ohio State University
- ◆ M.S., City and Regional Planning, The Ohio State University
- ◆ B.S., Geography and Psychology, Western Kentucky University

### YEARS OF TRANSPORTATION EXPERIENCE

40

### AFFILIATIONS

- ◆ CTAA Member & Instructor
- ◆ DATIA Member
- ◆ NRTAP Instructor

### PUBLICATIONS

- ◆ "Prescription/Over-the-Counter Medications Toolkit," FTA 2002; updated 2011
- ◆ "It's Time to Coordinate" Coordination Toolkit, West Virginia Department of Transportation, 2006
- ◆ "Minnesota Coordination Study and Toolkit," Minnesota Department of Transportation, 2005
- ◆ "Implementation Guidelines for Drug and Alcohol Regulations in Mass Transit," FTA 4/94; 2001
- ◆ "A Handbook for Coordinating Transportation Services," Ohio Department of Transportation, October 1991; rev. October 1997
- ◆ "A Guide for Implementing Coordinated Transportation Systems," Ohio Department of Transportation; October 1997

### PROFESSIONAL EXPERIENCE

**President, RLS & Associates, Inc., 1987 — Present** – Ms. Sarles is highly regarded in the transit industry for her development of sound, practical solutions that are both realistic and implementable. During her career, she has conducted hundreds of projects in the areas of service analysis, route and schedule design, transit plan development, regulatory compliance, mobility management, marketing, human service coordination, maintenance recordkeeping, drug and alcohol testing programs, Americans with Disabilities Act regulatory compliance, Title VI, safety and risk management, innovative services, and all aspects of operations. She has personally developed dozens of feasibility plans and customer surveys, coordination plans, and transit development and service plans to both implement new and enhance and expand existing transit service. Recently, she was the Project Manager and lead for the CTAA E-Learning project to develop an on-line module to assist mobility managers in being more effective in facilitating meetings among community partners and negotiating differences that arise.

In addition to overseeing RLS' 19 Drug and Alcohol technical assistance and training contracts, 12 on-call assistance contracts, and RLS' many compliance and planning contracts.

Currently, Ms. Sarles is the Project Manager as well as a Lead Reviewer, and Subject Matter Expert for the FTA Comprehensive Oversight Review and Technical Assistance Program (CORTAP), FTA's systematic oversight program to ensure State DOT and transit system compliance with Federal transit program regulations. This is in addition to overseeing compliance monitoring projects in Oregon, Tennessee, New Jersey, North Carolina, Illinois, and Wisconsin and Drug and Alcohol Compliance Review and Training projects in Alaska, Nevada, Indiana, North Carolina, Oregon, West Virginia, Georgia, and New York, she conducts training across the country on a wide variety of topics including Drug and Alcohol, Title VI, Performance Measurements, Customer Service, and many, many more.

Finally, Ms. Sarles is directing Mobility Ohio for the Ohio DOT, a project with significant importance and potential impact for not only the state, but nationally, regarding how human service transportation is funded and provided. The project is in the implementation phase, where project successes to date will be carried forth in a policy alignment initiative that will be realized through the development of necessary policy, tools, technical assistance and procedures to meet the needs of agencies, service providers, drivers, customers and ODOT. The goal is to improve the quality and safety of human service transportation services within Ohio to create a simpler, level playing field for service providers while reducing the administrative burden on state agencies.

PROFESSIONAL EXPERIENCE (Continued)

**Transportation Management Services, Inc., a Division of Multisystems; Manager, Support Services, June 1986 — Sept. 1987**—Ms. Sarles supervised and assisted TMSI managers in the performance of specific systems analysis, i.e., maintenance, scheduling, marketing, customer relations, service development, operations analysis, training, accounting, and NTD reporting. She also served as project director on other projects. Completed projects included:

- ◆ Assisted in the initiation of the Specialized Transportation Assistance for Richmond (STAR) service for the Greater Richmond Transit Company.
- ◆ Initiation, operations, and supervision of all aspects of the Tysons Shuttle (Fairfax County, Virginia) commuter service, Reston Internal Bus Service, Arlington Community Services Board specialized transportation program, Rocky Mount Transit System, and special needs transportation for the Northern Virginia Training Center.
- ◆ Assisted in the completion of an evaluation of the Indianapolis Public Transportation Corporation's OPEN DOOR service for handicapped residents of Marion County including the preparation of an alternatives analysis and development of recommendations.
- ◆ Developed an operations plan for the expansion of the Fairfax County (VA) specialized transportation service from 53 vehicles to 120 vehicles.
- ◆ Assisted in the completion of the Wisconsin statewide transit maintenance study where the maintenance programs of all 19-transit systems in the state were evaluated.
- ◆ Assisted in an operational analysis of the O-Bahn Busway in Adelaide, South Australia.
- ◆ Assisted in the design of a wage and work conditions plan for a new consolidated transportation system in Waterloo, Iowa.
- ◆ Assisted in the design of a system map and customer information aids for the Montgomery County (MD) Ride-On System.
- ◆ Conducted a system management study of the City Bus Service of Springfield, Ohio; Transit Development Plans for the Janesville Transit System, Beloit Transit System, La Crosse Municipal Transit Utility and the Nash and Edgecombe Counties coordinated transportation system, and management performance review for the Polk County Transportation Authority in Tryon, NC and the Anson County Transportation Authority in Wadesboro, NC.

**National Transit Services, Inc.; Director, East Coast Consulting Services, June 1983 — May 1986**

Project Director of all East Coast consulting efforts. Responsible for support services to NTS consulting clients and management properties in the areas of service analysis, service planning, route and schedule design, marketing/public information programs, preparation of written documents, and oral presentations.

**Central Ohio Transit Authority; Senior Service Analyst, December 1980 — May 1983**

Initiated and supervised a series of comprehensive transit corridor studies to determine transit demand, route productivity and service developments.



Ms. Laura Brown has a diverse background of transit planning and financial management and analysis experience as well as a solid history of experience with rural and urban transit systems planning. An experienced Project Manager, Ms. Brown is RLS' Director of Planning Initiatives, with a concentrated focus in Human Service and Paratransit Planning. In this regard, Ms. Brown has directed dozens of high profile projects across the country resulting in the development of State, regional, and locally developed coordinated transportation plans, short and long range transportation plans, service evaluations, service assessments, and public outreach activities, including passenger on/off counts and surveys. Ms. Brown has completed National Environmental Policy Act Training and Categorical Exclusions Training.

## LAURA BROWN

*Chief of Business Development/Director of Planning Initiatives*

### EDUCATION

- M.P.A., Masters of Public Administration, Wright State University, 2000
- B.A., Sociology, The Ohio State University, 1995

### YEARS OF TRANSPORTATION EXPERIENCE

20

### PUBLICATIONS

- CTAA Transit Fare Pass Toolkit
- FTA Prescription and Over-the-Counter Toolkit
- NCHRP Task 20-65, Task 65: Best Practices for State DOTs to Meet Bus Fleet Replacement and Expansion Needs
- NCHRP Task 20-65, Task 66: State and Local Use of Administrative Resources Provided by the Federal Transit Administration
- NCHRP Task 20-65, Task 79: Program Management Insights for the Section 5310 Program

### PROFESSIONAL EXPERIENCE

**Chief of Business Development/Director of Planning Initiatives, RLS & Associates, Inc. 2000-2004; 2007 to Present** – Ms. Brown's forte is in consensus building and the development of implementable plans with practical solutions at the local, regional and Statewide levels. A few examples include:

- Project Manager/Lead Planner, Chicago RTA Regional Coordinated Transportation Plan Update. (2021)
- Project Manager/Lead Planner, Maine DHHS Transportation Program Evaluation (2020)
- Planner, Central Indiana Section 5311/5307 Funding Allocation Study. (2019)
- Project Manager/Lead Planner, Tennessee DOT Office of Mobility and Accessible Transportation Strategic Plan (2020-2022)
- Planner, Concord and Kannapolis Transit Consolidation Study (2022)
- Project Manager/Lead Planner, Vermont Route 30 Transit Feasibility Study.
- Project Manager/Lead Planner, Johnson City Coordinated Plan.
- Project Manager, Wausau, Wisconsin/Metro Ride Transportation Development Plan (2021-2022)
- Project Manager, Bangor Community Connector Regional Transit Structural Analysis. (2021)
- Project Manager/Lead Planner, Regional Coordinated Transportation Plans for Southwest, Southcentral, and Southeast TN HRAs.
- Project Manager/Lead Planner, Utah Transit Authority Specialized Transportation Implementation Plan. (2019-2020)
- Project Manager and major contributor to 11 Regional West Virginia Regional Coordination Plans (2019).
- Project Manager and lead planner for the Central Midlands Council of Governments Coordinated Human Services Transportation Plan (2019).
- Lead Researcher, Ohio Mobility Transformation, Ohio DOT
- Project Manager and lead planner for the KYOVA Interstate Planning Commission (KYOVA) Coordinated Public Transit-Human Services Transportation Plan for the Transportation Management Area (TMA) that includes the West Virginia counties of Cabell, Wayne, and the urbanized portion of Putnam County; the urbanized portion of Lawrence County, Ohio; and Boyd and Greenup Counties, Kentucky (2019).
- Project Manager, Statewide Coordinated Transportation Plan in Nevada (2018-2019). Ms. Brown led the overall development of this statewide plan as well as providing on-site public outreach through public meetings and interviews.
- Project Manager, Rock Hill, SC Transit Implementation Plan.
- Project Manager for the Miami Valley Regional Planning Commission Public Transit-Human Services Coordinated Plan Update (2018/19).



PROFESSIONAL EXPERIENCE (Continued)

- Project Manager, New Hampshire DOT Statewide Coordination Plan (2017). Ms. Brown directed the efforts to update the original 2006 Coordination Plan that was only partially implemented. Working closely with the New Hampshire Department of Transportation Bureau of Rail and Transit and the Statewide Coordinating Council, Ms. Brown provided strategies for continuing and expanding services under the current funding shortages, as well as provide demographic updates and re-visit unmet needs and gaps in services.
- Project Manager for the Gwinnett County Transit (GCT) Plan Task to evaluate Human Services Transportation coordination opportunities that would create efficiencies for the GCT paratransit program (2018).
- Project Manager and major contributor for the Indiana Statewide Coordinated Public Transit-Human Services Transportation Plan and MAP-21 updates under the direction of the Indiana Department of Transportation, Office of Transit (INDOT). The planning process included individual county and regional plans, and the Indianapolis Regional (8 County) Coordinated Public Transit Human Services Transportation Plan. Each plan consisted of a comprehensive community outreach process, including a community survey and several focus groups, alternatives analysis, organizational and service strategy goal development, and implementation plan. Updated plans comply with MAP-21 legislation (2017).
- Lead researcher on the Ohio Statewide and Regional Coordination – Establishment of Regions and Coordination Plan Framework. Ms. Brown worked with ODOT staff to develop Coordination Regions in the state. Regions we developed using quantitative data from ODOT, U.S. Census, and other state and local organizations. Ms. Brown also helped develop a coordination template and toolkit that is being used by local agencies to create a locally coordinated transportation plan (2016).
- Project Manager for the Randolph/Montgomery Cos, NC, Community Connectivity Plan. Evaluating current services and developing new services (fixed routes and demand response) and organizational structure recommendations for the local area and region (2019).
- Project Manager for the Valparaiso Route Study, Valparaiso, IN, and lead researcher for the Wichita Transit Paratransit Assessment.
- Lead reviewer for the New Jersey Title VI reviews, conducting a review of each plan's required components and preparing detailed findings and recommendations.
- Project Manager for the Gloversville Regional Transportation Plan—analysis of existing fixed route, intercity, and human services transportation productivity and development of recommendations to expand services and streamline the organizational structure.
- Project Manager and lead consultant for the Union County, Ohio and Yankton, SD, respectively, MAP-21 Coordinated Public Transportation-Human Services Plan, and lead consultant for the Matanuska-Susitna Borough (MSB), AK Transit Plan.
- Project Manager and co-Mobility Manager for Kodiak, Alaska.
- Ms. Brown was a lead researcher for two national research projects for the National Cooperative for Highway Research Program. The first project was to gather and analyze data from all 50 State Departments of Transportation regarding state practices for the continued replacement of Section 5310, 5311, and 5311(f) purchased vehicles. The second project involved the study of State DOT administration practices of FTA funded programs (Sections 5310, 5311, and 5311(f)).
- Lead contributor for the Interior Alaska Transit Corridor Project.
- Project Manager and lead contributor to the Fairbanks North Star Borough Mobility Management Plan.
- Project Manager for the Sitka, Alaska 5-Year Plan for Coordination of Human Services Transportation Needs and Services.
- Project Manager and major contributor for the update of the 2008-2014 Coordinated Human Services Transportation Plan for the Municipality of Anchorage (MOA).
- Project Manager for the North Central Wisconsin Workforce Development Board and Stevens Point Transit expansion plan.
- Project Manager for Transportation Development Plans (TDPs) in Niles, MI and Newark, OH.
- Project Manager for the Seminole Nation of Oklahoma (SNO) transit plan,
- Project Manager for the Erie County (Ohio) Board of Developmental Disabilities feasibility study.
- Project Manager for the Lowcountry Regional Transportation Authority (LRTA) expansion study.
- Project Manager for the Toledo Area RTA Title VI and Environmental Justice Survey, and Analysis.
- Project Manager for the Ann Arbor Transportation Authority Paratransit Service Model and countywide needs assessment.

**Northrop Grumman Information Technology, Defense Group**  
**Comptroller/Program Control Analyst, October 2004 – April 2007**



Ms. Christy Campoll is an experienced Project Manager as well as Lead Planner and Researcher for RLS' planning team; reviewer for the RLS compliance team; and a former transit manager and transportation vice president for a rural, demand response public transit system in central Indiana. In this latter role, she was directly responsible for the system's demonstrable growth and improved cost-efficiency. As an RLS Senior Associate, she provides leadership and support on projects to improve mobility through innovative and experimental approaches to longstanding challenges of interagency coordination and transit service delivery. Her projects have included local, regional, and statewide coordination plans, service evaluations, transit development plans, and comprehensive operational assessments, in which her strengths in grants management, transit service delivery, research, public policy, and compliance monitoring are an invaluable resource.

**CHRISTINA R. CAMPOLL**

*Senior Associate*

EDUCATION

- ◆ Master of Public Affairs, Indiana University – Bloomington, December 2006
- ◆ Bachelor of Arts, Indiana University – Bloomington, August 2001
- ◆ Doctoral Coursework in Organizational Studies, Wright State University – Dayton, OH (2020—Ongoing)

YEARS OF TRANSPORTATION EXPERIENCE

11

PROFESSIONAL EXPERIENCE

**Senior Associate, RLS & Associates, Inc. – January 2018 to Present** – Some of Ms. Campoll's current and recent project roles include:

- ◆ Planner/Researcher for the Mobility Ohio project, to align the elements of policy, funding, planning, and technology into a coordinated and enhanced mobility platform among state agencies funding human service transportation, including the implementation of pilot initiatives in a nine-county region of southeast Ohio (2018-Ongoing)
- ◆ Project Manager, Potomac Valley Transit Authority (PVRTA) Service Evaluation and Facility Expansion Study (2022-Ongoing), to evaluate transit service effectiveness and recommend facility improvements for a five-county transit system in West Virginia
- ◆ Project Manager, Geauga, OH County Transit Development Plan, to develop alternatives for organizational structure and transit service (2022-Ongoing)
- ◆ Project Manager, Preble County, OH and Marion County, OH Transit Feasibility Studies, analyzing and recommending alternatives for start-up public transit systems in two rural Ohio counties (2021-2022)
- Deputy Project Manager, "Bus of the Future" Operator Compartment Redesign, a FTA-funded research project to address problematic aspects of current bus operator compartments and interrelated aspects of bus design (2020-Ongoing)
- ◆ Lead Researcher, Lapeer County, MI Transportation Needs Assessment (2021-2022), conducting a needs assessment for senior and public transportation options
- ◆ Project Manager, IndyGo Section 5307 Consultant Services, providing oversight program start-up and technical assistance for a large urban bus system incorporating four new suburban FTA funding subrecipients (2021-Ongoing)
- ◆ Project Manager for the Indianapolis Metropolitan Planning Organization Sections 5307/5311 Allocation Analysis, to recommend an approach to funding suballocation and organizational structure among six transit providers (2020-21)
- ◆ Project Manager for 11 Indiana Regional Coordination Plan Updates and 5 Indiana MPO Coordination Plan Updates (2020-2022)
- ◆ Project Manager for the Sunset Empire Transportation District (Clatsop County, OR) Coordinated Plan (2020)
- ◆ Co-Project Manager for 11 West Virginia Regional Coordination Plan Updates (2018-19)
- ◆ Lead Planner for the Plainfield/Guilford Township, IN Transit Plan (2019-20) and the Northern Johnson County, IN Transit Plan (2021) to develop the suburban communities' transit expansion plans
- ◆ Assistant reviewer for the Oregon DOT and North Carolina DOT compliance

PROFESSIONAL EXPERIENCE (Continued)

review and technical assistance projects (2018-19)

- ◆ Co-Project Manager for the Monroe County, IN Route Optimization Study, a service analysis effort to redesign a rural fixed route (2018-19)
- ◆ Lead Planner for the Tiffin, OH transit expansion project (2018-19)
- ◆ Researcher for the Colorado Association of Transit Agencies Non-Emergency Medical Transportation (NEMT) Study, examining the impact of recent NEMT legislation on public transit systems (2019)
- ◆ Researcher for the rabbitransit Regionalization Effectiveness Study, conducting an evaluation of regionalized transit services (2018)
- ◆ Project Manager, Hancock Co., IN Transportation Needs Survey (2018)
- ◆ Project Manager, Kokomo-Howard County, IN Coordinated Plan (2018)
- ◆ Community input support, including conducting public meetings, stakeholder interviews, and surveys, for multiple projects including the Tennessee Office of Mobility and Accessibility Strategic Plan (2020-21), Central Midlands Council of Governments Coordinated Plan (Columbia, SC—2019), Stark Area Regional Transportation Authority Coordinated Transportation Plan Update (Stark County, OH—2018-19), Nevada Coordinated Transportation Plan Updates (2018), and the Miami Valley Regional Planning Commission Human Services Coordinated Transportation Plan Update (Dayton, OH—2018-19)

**Janus Developmental Services****Vice President of Transportation, June 2015—December 2017**

- ◆ Hired as Director of Transportation; promoted to Vice President in January 2017
- ◆ Lead transportation department of human services agency
- ◆ Implement operational changes to demand-responsive public transportation program resulting in increase in annual ridership from 50,579 (2015) to 66,208 (2017), representing a 31% increase in ridership with only 12% increase in costs
- ◆ Launch and manage non-emergency medical transportation program serving patients of Riverview Health providing over 12,000 trips per year
- ◆ Report program activities to funders, elected officials and external stakeholders
- ◆ Supervise two managers, five schedule/dispatch staff and 29 drivers
- ◆ Manage departmental budget of \$1.9 million
- ◆ Collaborate with other agency departments and community organizations on new transportation services

**Miller Transportation****Scheduled Service Manager, September 2013—April 2015**

- ◆ Manage intercity bus, commuter express bus and suburban circulator transportation services of private motorcoach company
- ◆ Develop and implement procedure for reconciliation of ticket sales by agents in two states
- ◆ Develop and implement policies and procedures for scheduled bus service operations
- ◆ Coordinate scheduling and dispatch of drivers and vehicles for scheduled bus service
- ◆ Train and supervise bus drivers in scheduled service operation
- ◆ Resolve service issues in cooperation with drivers, bus terminal agents, mechanical staff and management
- ◆ Assist clients (transit agencies and nonprofit organizations) in development of transportation services

**Central Indiana Regional Transportation Authority****Mobility Manager & Program Liaison, June 2010—September 2013**

- ◆ Engage transit providers in Central Indiana region in coordination of services
- ◆ Develop grant proposals to fund public transit programs with budgets of up to \$1.2 million
- ◆ Develop and manage commuter express bus and reverse commute circulator services
- ◆ Manage web development vendor in creation of online transportation resource directory
- ◆ Promote reverse commute transportation services to employers and service agencies
- ◆ Manage agency compliance with USDOT requirements for recipients of federal funding
- ◆ Serve on project selection committees for USDOT grant awards
- ◆ Coordinate online agency communication including website and social media
- ◆ Assist Central Indiana residents in identifying public transit options
- ◆ Assist Executive Director in transportation policy advocacy activities
- ◆ Evaluate transportation programs and recommend strategies to Executive Director and Board of Directors



Ms. Matheny is a seasoned director with over 12 years of experience in the public transportation industry. She has a proven track record addressing program efficiencies through analysis and revision of organizational practices and procedures including, the introduction of innovative technology solutions and service delivery alternatives. Ms. Matheny brings the ability to effectively manage federal, state and local grants, operations, contracts, and a diverse range of projects and personnel within budget. An example is the implementation of a microtransit service through RideMICRO, a pilot program introducing on-demand service to un and underserved areas in the three counties. Ms. Matheny conducted research, secured grants for support, and managed technology enhancement projects. Her specialty is creating and executing planning initiatives and programs with an ability to adapt and deliver under changing environments. Ms. Matheny also bring a strong sense of organizational mission and aptitude to lead a team in meeting established goals and objectives.

**MEGAN MATHENY**

*Associate*

EDUCATION

- ◆ Master of Public Administration (Concentration in Non-profit Management), University of North Carolina Wilmington, 2012
- ◆ Bachelor of Arts in Political Science, University of Tennessee, Knoxville, 2007

LICENSES AND CERTIFICATIONS

- ◆ Previous, Board of Directors for North Carolina Public Transportation Association
- ◆ Previous, Board of Directors for disAbility Resource Center

YEARS OF TRANSPORTATION EXPERIENCE

12

PROFESSIONAL EXPERIENCE

**Associate, RLS & Associates, Inc., May 2022 — Present**

Past and current projects include:

- ◆ Ohio DOT, Geauga County Transit Development Plan
- ◆ Tennessee DOT OMAT Mobility Management Toolkit
- ◆ Marble Valley Rural Fixed Route Plan, Vermont

**Deputy Director, Cape Fear Public Transportation Authority, 2017 – 2022**

Wave Transit is the public transportation provider for the Cape Fear region offering fixed-route bus, UNCW Seahawk Shuttle, Port City Trolley, and ADA accessible van services and performing 1.3 million passenger trips annually in 2019.

- ◆ Responsible for administering the Federal Transportation Administration’s (FTA) public transit program for the Wilmington urbanized area.
- ◆ Manages the organization’s Civil Rights Programs and serves as the Americans with Disabilities Act (ADA) compliance officer
- ◆ Plans, directs and oversees daily operations under fixed route bus, ADA paratransit, vehicle maintenance and facility maintenance departments
- ◆ Works with management contractor and vendors to ensure sufficient goods and services are available to maintain fleet of rolling stock to FTA state of good repair standards
- ◆ Develops and implements department goals, objectives, procedures and service standards
- ◆ Maintains departmental standards for safety and ensures adherence with policies, guidance, regulations and schedules
- ◆ Prepares short and long-range planning functions in accordance with adopted plans
- ◆ Manages the Making Waves Foundation, an independent 501(c)3, established by the Authority
- ◆ Responsible for direct and indirect oversight of 130 personnel members
- ◆ Works with key staff to identify and resolve problems

**Director of Planning and Development, Cape Fear Public Transportation Authority, 2014 – 2017**

- ◆ Management and oversight of short-range planning initiatives resulting in operational efficiencies within the transportation service network
- ◆ Manages the Making Waves Foundation, an independent 501(c)3, established by the Authority in 2011
- ◆ Securement and effective management of federal and state grants to ensure services provided within adopted budget
- ◆ Responsible for contract oversight with the University of North Carolina Wilmington for transportation services administered under the UNCW Sea-

PROFESSIONAL EXPERIENCE (Continued)

hawk Shuttle Program

- ◆ Creation and implementation of capital improvement plans resulting in standard operating procedure with city and state agencies for enhancement of passenger amenities at transit stops

**Paratransit Manager, Cape Fear Public Transportation Authority, 2011 – 2014**

- ◆ Administration of ADA complementary transportation services under the organization's Paratransit Department in accordance with federal regulations
- ◆ Responsible for management of contracts with county jurisdictions and community non-profits for performance of 500,000 annual non-emergency medical and other transportation services
- ◆ Direct management of a 27-member team and a fleet of 24 vehicles



Mr. Kelly Shawn's 36 years of experience in the transportation industry, including eighteen years with the Community Transportation Association of America (CTAA), have provided him with a diverse background in operations, planning, and safety. An experienced planner, trainer, facilitator, and project manager, Mr. Shawn has worked with dozens of diverse community and tribal transit systems during his career, developing local, regional, coordinated, and transit development plans to meet the unique needs and characteristics of each individual study area. His experience with transit asset management, coordinated human service transportation, Medicaid and non-emergency medical transportation (NEMT), privately contracted, and intercity transportation services add to his impressive background and professional understanding of the transportation industry.

He is currently considered one of the leading experts in FTA's Transit Asset Management program and Tier II Agency Safety Plans, FTA's Safety Management Systems (SMS), and is a Certified Safety and Security Officer.

## KELLY SHAWN

Senior Associate

### EDUCATION

- ◆ Bachelors of Science, Business Administration, Lynchburg College, Lynchburg, VA

### YEARS OF TRANSPORTATION EXPERIENCE

36

### AFFILIATIONS

- ◆ Certified Community Transit Manager (CCTM) & Master Trainer – CTAA
- ◆ Professional Dispatch and Scheduling (PDS) & Certified Trainer – CTAA
- ◆ Passenger Service and Safety (PASS) & Certified Master Trainer – CTAA
- ◆ ICS-100 – Introduction to Incident Command Structure - FEMA
- ◆ HSR For Social and Behavioral – City University of New York (CUNY)

### PUBLICATIONS

- ◆ North Carolina DOT Training Toolkit
- ◆ American Indian Transportation Issues and Best Practices, RTAP, Technical Assistance Brief, 1994 (revised 2005)
- ◆ Transportation in Indian Country: Getting Started, CTAP Brief, 1995
- ◆ Assisting Passengers Traveling with Service Animals, Project ACTION report, 1997
- ◆ Pocket Guide to ADA for Fixed Route Drivers, Easter Seals, Project Action, 2004
- ◆ TCRP Synthesis 71, Paratransit Managers Skills, Qualifications and Needs, 2006
- ◆ TCRP A-33, 2011
- ◆ TCRP A-36, 2012
- ◆ TCRP A-37, 2012
- ◆ NCHRP 20-59 (32) A Transportation Guide for All Hazards Emergency Evacuation, 2012
- ◆ NCHRP 20-65 (77) Lessons Learned and Impacts to Date of State DOT Implementation of New FTA Asset Management and Public Transportation Agency Safety Requirements, 2017

### PROFESSIONAL EXPERIENCE

**Senior Associate, RLS & Associates, Inc., September 2013 — Present** Mr. Shawn is responsible for project management on planning, safety and security, asset management and compliance projects across the country. RLS clients include FTA, State Departments of Transportation, County Governments, urban and rural transit systems. As the contract manager on safety and planning projects, Mr. Shawn is an experienced, nationally recognized trainer and lead reviewer with extensive expertise in urban, rural, and tribal transit through his work for RLS and the Community Transportation Association of America (CTAA).

Mr. Shawn is assisting with development of the Johnson City, TN Coordinated Transportation Plan, development of NCDOT's Risk Based Subrecipient Assessment Program, and an Ohio DOT Whitepaper on the Impacts of Vehicle Shortages on Public Transit. He was Project Manager for the Wichita Transit Authority Paratransit Service Evaluation; the Wayne County, West Virginia Service Evaluation and TDP; the Yankton Transit, South Dakota, Coordinated Transportation Plan Update; the Wichita Safety and Security Assessment, Wichita Mobility Management Project; Fairbanks North Star Borough Security Consulting project; and, the National RTAP Project for the Sullivan County, New Hampshire service expansion evaluation and plan.

Mr. Shawn is RLS' staff expert and Subject Matter Expert for Safety Management Systems, Transit Asset Management, Operations, Tribal Transit and FTA Compliance. Mr. Shawn is Project Manager on many of RLS' planning, safety, and maintenance projects while also providing training for National RTAP, CTAA, MAP, and many State DOTs and Associations. He was a lead reviewer conducting compliance reviews for the Oregon DOT, North Carolina DOT and Tennessee DOT. Mr. Shawn has completed the Community Transportation Association's Certified Safety and Security Officer training and developed a program to train Accountable Executives and Safety Officers across the state of North Carolina and is a master trainer for four CTAA certification courses.

Further, Mr. Shawn has provided training on SMS and PTASP for the Illinois DOT, Indiana DOT, Delmarva Community Transit, Alabama DOT, North Carolina DOT, New Hampshire DOT, VTrans, Maine DOT, Kentucky Public Transit Association, Wisconsin DOT, and Minnesota DOT. He has also provided TAM training to CalACT, National RTAP, West Virginia DOT, Kentucky Public Transit Association, Tri-State Transit Conference, Oregon DOT, and Indiana DOT. Mr. Shawn has also conducted many frontline operator trainings including, staff concerns and challenges, driver fatigue, dispatch training, customer service, emergency preparedness, and transit's roles in disasters.

PROFESSIONAL EXPERIENCE (Continued)

Recently he has worked with state DOTs to provide Safety Management Systems (SMS) training in five states and develop Public Transportation Agency Safety Plans (PTASP) to more than 25 small urban systems. Mr. Shawn has worked with North Carolina DOT to conduct Safety and Security Compliance Reviews for 10 small urban and rural subrecipients. He is also developing a new compliance review for safety to be combined with grants management compliance reviews.

In addition, he has worked with state DOTs to develop Transit Asset Management Plans by implementing new data collection methods, developing statewide State of Good Repair (SGR) benchmarks, performance measures and decision making tools used by states and transit systems for forecasting asset replacement or rehabilitation. Currently, Mr. Shawn is working with the states of Indiana, Nevada, New Hampshire, Oregon, North Carolina, Tennessee, and West Virginia to develop TAM plans and provide training to grantees. He has developed National TAM products like decision making tools and webinars sponsored by National RTAP and has been on several TAM training panels with FTA and state program managers. He was also the Project Manager and Lead Researcher for the NCHRP 20-65, Task 77 Research Study, *Lessons Learned and Impacts to Date of State DOT Implementation of New Federal Transit Asset Management and Public Transportation Agency Safety Requirements*.

**Assistant Director of Technical Assistance Programs, Community Transportation Association of America, 1998 — September 2013**

Mr. Shawn provided on-site technical assistance to urban, rural and tribal communities and human service agencies nationwide assisting in the development of coordinated accessible transit and facility service plans for over 50 projects. He also worked with Federal agencies on transit solutions for economic development, employment transportation, and general public transit; and developed and provided training to transit professionals, state transit associations and national audiences on Federal regulations, transit management, driver training and customer service. Mr. Shawn was part of the local, state and Federal team that developed transportation solutions for persons with disabilities and displaced residents in the aftermath of Hurricanes Katrina and Rita.

**Contract Manager, Metro Access of Maryland, 1996 — 1998**

Mr. Shawn managed a \$2 million paratransit provider contract for Washington Metropolitan Area Transit Authority, working with WMATA and contractor staff to achieve performance standards and the highest level of customer service for persons with disabilities to meet ADA compliance. He also managed a Medicaid Transportation contract with Prince Georges County, MD and private pay transportation services, which provided over 200,000 trips annually.

**Information Specialist, Community Transportation Association of America, 1993 — 1996**

Mr. Shawn was responsible for providing transit resources, technical assistance and peer assistance and worked with transit professionals across the country to develop policies and procedures related to the Americans With Disabilities Act and Drug and Alcohol Testing.

**Manager of Operations, American Coach Lines, Inc., 1987 — 1993**

**General Manager Ground Transportation, Washington Flyer, 1986 — 1987**



Ms. Bethany Renner works from the Dayton, OH Headquarters, having joined RLS & Associates, Inc. after years of work in charitable giving, community outreach, event operations, and project management. Ms. Renner is an Associate supporting state subrecipients with technical assistance, coordinated plans and feasibility studies, along with compliance related reviews for 5310 programs and Title VI Programs. She has supported projects for multiple state Department's of Transportation including: Illinois, Indiana, Ohio, Georgia and Tennessee. Ms. Renner is also a staff resource at the agency operation level Her initial assignment was as an Associate for the Illinois Department of Transportation (IDOT), where she provided IDOT staff and subrecipient support, processing invoices, and responding to requests for technical assistance.

**BETHANY RENNER**

*Associate*

EDUCATION

- ◆ Masters of Public Administration: Nonprofit and Community Leadership, University of Dayton, 2014
- ◆ B.S. Early Childhood Education, Pre-Kindergarten Special Needs, University of Dayton, 2012

YEARS OF TRANSPORTATION EXPERIENCE

1

AFFILIATIONS

- ◆ Dayton YMCA Childcare Services Branch, Board Member
- ◆ Women's Leadership Collaborative of Greater Dayton, Cohort Member

PROFESSIONAL EXPERIENCE

**Associate, RLS & Associates, Inc., January 2021 — Present** – Past and current projects include:

*Planning*

- ◆ For the INDOT regional coordination plan updates, utilized survey data to create charts related to the public's access and thoughts on public transit and analyzed data for the regional needs assessments.
- ◆ For the Lapeer County, MI Feasibility Study, gathered community input from the County's townships, and encouraged participation in the public participation meetings and on-line survey.
- ◆ For the Preble County, OH Feasibility Study, conducted interviews with community stakeholders to understand the needs of community members and impact and needs of the human service agencies in the County.
- ◆ As part of short-range planning assistance and completion of a comprehensive report to the BCRTA, collected and analyzed survey data from peer transportation agencies to create wage and salary analysis for BCRTA; conducted interviews of BCRTA staff; and conducted peer transit system research, among other assignments.
- ◆ Supported the efforts related to the Tennessee Department of Transportation's Human Services Transportation Plan for the Southwest Region of the state. Created a service provider inventory and researched and gathered information from stakeholders.

*Technical Assistance*

- ◆ Provide technical assistance, compliance review support, data and BlackCat system management and funding application review for IDOT.
- ◆ Conducted Title VI Plan reviews and technical assistance for the Georgia Department of Transportation (GDOT).
- ◆ Supported the development of a Facility Construction Funding Application for the Ohio DOT utilizing best practices and regulations.

*Compliance*

- ◆ Created materials and enhanced the process for the review of Section 5310 Program and Pandemic-Related Funding for the Indiana Department of Transportation and the Ohio Department of Transportation.
- ◆ Co-lead Section 5310 Program Reviews and provided technical assistance to subrecipients for INDOT.
- ◆ Co-led 5310 Technical Assistance Review and On-site vehicle inspections for the Ohio Department of Transportation.
- ◆ Researched and contributed to the update of the State Management Plan and Rural Transit Manual for the Ohio DOT.

**Event Manager, One10 LLC, September 2018 – January 2021**

**Director of School Development, Dayton Early College Academy (DECA), Janu-**





Ms. Lovins comes to RLS with over 23 years of experience as an Administrative Assistant in an office environment. Extensive office experience dealing with a diversity of professionals, clients and co-workers.

An experienced Office Manager, Ms. Lovins is highly skilled in scheduling trainings, managing databases, webinar moderation, and has assumed major responsibilities with data management for RLS' RTAP projects, including the scheduling and serving as moderator of RLS virtual training modules.

In addition to her RTAP experience, Ms. Lovins is an Associate working in the areas of drug and alcohol compliance, 5310 compliance, and state DOT assistance. She also assists with the production for RLS proposals and client products and helps with development of RTAP newsletters for New Hampshire, Minnesota, and Wisconsin.

## ROBIN LOVINS

*Associate*

### EDUCATION

- ◆ Associate of Applied Science, Sinclair Community College

### LICENSES AND CERTIFICATIONS

- ◆ ABA Certified Paralegal Program Graduate – With Honors
- ◆ Certified Notary Public, Ohio

### YEARS OF TRANSPORTATION EXPERIENCE

3

### AFFILIATIONS

- ◆ Member of the Cambridge "Who's Who of Executive Professionals"

### PROFESSIONAL EXPERIENCE

**Associate, RLS & Associates, Inc., March 2020 — Present** – Past and current projects include:

- ◆ Assisted with salary study for Butler County Regional Transit Authority.
- ◆ Prepared compensation and benefits study report for New Hampshire Department of Transportation.
- ◆ Assists with 5310 technical assistance reviews for Ohio and Indiana.
- ◆ Assisted with the Lapeer County, Michigan, and Vermont Route 30 feasibility studies.
- ◆ Assists with the Marion County, Ohio and Preble County, Ohio feasibility studies.
- ◆ Conducts drug and alcohol technical assistance reviews for West Virginia, New York, and Ohio.
- ◆ Conducts drug and alcohol random testing analysis for Ohio and North Carolina.
- ◆ Assists in development of training presentations and conducts Quality Assurance reviews for all webinar and in-person training materials.
- ◆ Provides Database management for all RLS RTAP contracts using "Training Trackers."
- ◆ Served as moderator for RTAP training webinars for New Hampshire, Massachusetts, Indiana, Wisconsin, Tennessee, and Ohio.
- ◆ Maintains/updates RTAP websites for New Hampshire, Indiana, and Wisconsin.
- ◆ Assisted with the Mobility Ohio project to establish statewide database of transit providers.
- ◆ Assisted with compiling survey data for Indiana 2020 HHWP Community Needs Assessment.
- ◆ Assisted with stakeholders interviews for the Chicago RTA Human Service Agency Transportation Plan project.
- ◆ Served as the temporary, interim mobility manager coordinator for Ohio DOT Mobility Management program.
- ◆ Assisted with Tennessee DOT focus groups for Mobility and Accessible Transportation.
- ◆ Assisted Illinois DOT with review of rural and urban DOAP applications.
- ◆ Assisted with bus ridership project for Bluefield Area Transit.
- ◆ For RLS' RTAP contracts, writes newsletter articles for the Minnesota and New Hampshire RTAP projects; scheduled trainings, tracked training participation, created certificates, processed scholarship applications and provided technical assistance as needed for New Hampshire RTAP, MaRTAP, Wisconsin RTAP, and OTAP.

PROFESSIONAL EXPERIENCE (Continued)

**Administrative Assistant/Secretary, Dayton Public Schools, August 2019 – March 2020**

**Legal Administrative Assistant/Assistant Office Manager, Holzfaster, Cecil, McKnight & Mues, June 2016 – August 2019**

**Legal Assistant, Cordell and Cordell, August 2015 – May 2016**

**Administrative Assistant, Helen Wallace, LLC , August 2014 – July 2015**

**Administrative Assistant, Rogers & Greenberg, L.L.P., June 1999 – January 2014**



Mr. Kincade is highly experienced with map development using ArcGIS and an experienced project manager for RLS’ data collection efforts for on/off passenger counts, passenger surveys and outreach efforts for transit and coordination plans and Title VI Program updates and analysis. Along with his knowledge of ArcGIS, Mr. Kincade also works with U.S. Census data to analyze and write demographic information on study areas.

In addition to his project responsibilities, Mr. Kincade is the RLS Office Manager and oversees all aspects of RLS’ administrative and business operating practices, including State registrations, prequalifications, invoices, contracts, and DBE certifications. He is also the production supervisor for all RLS proposals and client products and helps with development of RTAP newsletters. Finally, Mr. Kincade is the RLS Web Manager and was responsible for the coordination and oversight of the RLS website update.

**ZACH KINCADE**

*Chief of Administration/Office Manager*

EDUCATION

- ◆ B.S., Geography (Minor in Urban Affairs), Wright State University
- ◆ Public and Social Services Transportation Certificate, Wright State University
- ◆ National Environmental Policy Act Training, 2009
- ◆ Categorical Exclusions Training, 2009

LICENSES AND CERTIFICATIONS

- ◆ Ohio Notary Public , Commission Expires August 31, 2026

YEARS OF TRANSPORTATION EXPERIENCE

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PROFESSIONAL EXPERIENCE

**Chief of Administration/Office Manager, RLS & Associates, Inc., June 2007 — Present.** Past and current projects include:

- ◆ Task Lead, Ohio Department of Transportation, Transportation Investment Generating Economic Recovery (TIGER) grant for scheduling dispatch software for Ohio rural transit systems. Mr. Kincade was responsible for managing the implementation of Ecolane software at 12 rural transit systems in Ohio. —2019
- ◆ Project Manager on the Butler County RTA Salary Study & Job Description Review. Also provided recommendations on organizational structure. — 2022
- ◆ Project Manager, Greater Dayton RTA Performance Evaluations, worked with RTA operations to evaluate drivers, ambassadors, and customer service staff performance levels. Mr. Kincade conducted evaluations and coordinated other RLS staff in conducting regular evaluations on a monthly basis. —2018
- ◆ Major contributor to Indiana’s Intercity Bus Analysis. Mr. Kincade created demographic and service area maps for the entire state and analyzed survey data. —2022
- ◆ RLS Project Manager, GoCary Passenger Count. Mr. Kincade developed the on/off count methodology for counting all passengers for the GoCary bus system. He was also the lead supervisor the team who counted the number of boardings and alightings at each stop. —2018
- ◆ Lead Supervisor and major contributor to the Stark Area Regional Transportation Authority (SARTA) Human Services/Public Transit Coordinated Transportation Plan and Survey. Mr. Kincade supervised the team who undertook the on-board passenger survey. He also created demographic, route, and survey maps. —2019
- ◆ Project Manager, Greater Dayton RTA Title VI Analysis Update, oversaw data collection, survey distribution and analysis, mapping, demographic analysis, policy and procedure development, final report production. — 2019
- ◆ Project Manager, Hancock, Hardin, Wyandot, and Putnam Community Action Commission Community Needs Assessment, analyzed survey and community needs for low to moderate income families. —2016
- ◆ Major contributor to the City of Groversville Regional Transportation Study. Mr. Kincade developed demographic maps and charts, researched major trip generators, and geocoded provider trips. —2019
- ◆ Lead inspector, Ohio Department of Transportation Buy America Pre-Delivery Bus Inspections. Inspect LTV, LTN, MMV, and MV1’s purchased off the Ohio Statewide Vehicle Contract. —2018
- ◆ Project Manager, Indiana Department of Transportation, Office of Transit Annual Report. —2021