



## **Final Project Management Plan (PMP)**

# **The San Luis Obispo County Travel Management Coordination Center (TMCC) Project**

**Prepared for:**

**Federal Transit Administration (FTA)  
U.S. Department of Transportation**

**Prepared by:**

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# San Luis Obispo County Travel Management Coordination Center (TMCC)

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# **1 PROJECT OVERVIEW**

## **1.1 Background**

In July 2015, the Federal Transit Administration (FTA) announced five nationally awarded Mobility Services for All Americans (MSAA) Deployment Planning cooperative agreements for projects that showcase promising technologies and practices that improve travel planning and coordination for people who need specialized transportation within the Human Service Transportation (HST) environment.

FTA MSAA Deployment Planning cooperative agreements were awarded to selected local and regional organizations, including United Cerebral Palsy of San Luis Obispo County/Ride-On Transportation, to plan coordinated mobility services. Funded projects use intelligent transportation systems to coordinate deployment of on-demand public transportation systems, such as paratransit, for people with mobility issues. These program funds will help provide vital services for veterans, seniors, people with disabilities, and others who rely on community transportation providers to access everyday needs such as employment, medical care, and groceries.

### **1.1.1 United Cerebral Palsy of San Luis Obispo County/Ride-On Transportation, CA - San Luis Obispo County Travel Management Coordination Center (TMCC) Project**

The San Luis Obispo County MSAA Travel Management Coordination Center (TMCC) project will serve the citizens and visitors of San Luis Obispo County, California. Located along the central California coast, San Luis Obispo County is a thriving economic community that is home to 276,443 (2012 US Census estimated) residents, as well as medical centers, clinics, California Polytechnic State University (Cal Poly), post-secondary educational locations, employment centers, recreational, shopping, and other quality of life needs. The county covers a total of 3,299 urban and rural square miles that includes seven municipalities, including the county seat and largest city, San Luis Obispo. The county also includes three small urbanized areas: San Luis Obispo, Paso Robles-Atascadero, and Arroyo Grande-Grover Beach.

In addition, the San Luis Obispo region's community transportation partners provide services for many of the county's neediest citizens. The public and human service transportation partners provide mobility for many of the estimated 44,783 senior citizens and 37,872 persons living below the poverty level. According to the San Luis Obispo Council of Governments' (SLOCOG) 2007 Coordinated Human Service – Public Transportation Plan, the county's community transportation providers accounted for over "882,000 passenger trips annually, with 89 percent of these provided by 9 public transit operators, and just 11 percent provided by the 23 responding human service providers. Applying just the operations costs presented, the public transit cost of a one-way trip is \$10.45, while the human services agencies was \$2.45 in reported costs." Note, the region's coordinated human service transportation plan is currently undergoing revision

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through SLOCOG. The MSAA project award is being reflected in the plan. The regional coordination plan's discussion, information, and appropriate recommendations will be incorporated into the MSAA project.

Given the demographic background of the region, the San Luis Obispo County Travel Management Coordination Center (TMCC) project will focus on designing an interoperable, replicable, and scalable mobile technology system with the goal of coordinating paratransit and other specialized transportation passenger trips among partnering community transportation agencies and sharing this service information in real-time with the public. The focus of the San Luis Obispo County TMCC project aligns with the mission, goals, and objectives of the overall federal MSAA initiative through improving personal mobility and the coordination of HST. The San Luis Obispo County TMCC project's lead agency is Ride-On Transportation (known as Ride-On), a division of United Cerebral Palsy of San Luis Obispo County, a non-profit community partnership agency. Ride-On also serves as San Luis Obispo County's SLOCOG-designated Consolidated Transportation Services Agency (CTSA) and local Transportation Management Association (TMA), providing multiple community and human service transportation services and options throughout the county. The project features a public, human service, and private transportation partnership between Ride-On and immediate community mobility core project partners, including the San Luis Obispo Regional Transit Authority (RTA), Community Health Centers, SLO Regional Rideshare, SLO Safe Rides, Yellow Cab and regional taxi providers, and partnering human service agencies. The TMCC project will also include additional advisory partners or stakeholders from the United States Department of Transportation/Federal Transit Administration (FTA) – and its designees, SLO Council of Governments (SLOCOG, serving as the Metropolitan Planning Organization and ITS Architecture coordinator), City of San Luis Obispo (SLO Transit – fixed route), Cal Poly State University, California Department of Transportation (CalTrans), CenCal Health - Medi-Cal (California Medicaid), the United States Department of Veterans Affairs, USDOT/Federal Highway Administration (FHWA), local municipalities, Amtrak, RouteMatch Software, business and technology partners, and others as appropriate.

### **1.1.2 TMCC Project - Partners:**

The TMCC project will benefit and enhance the mobility and access to transportation information and services for all persons in San Luis Obispo County, California. For many years, across the county there has existed a coordinated transportation partnership between public, private, and non-profit transportation providers along with supporting county and municipal agencies to seek coordinated transportation options for citizens and guests.

The TMCC project features a lead agency (Ride-On), local project partners, advisory stakeholder partners, and a “key” 3rd party contractor. All partners involved in this project will meet at least quarterly and be known as the TMCC Advisory Committee (TMCCAC). The following is an overview of the project's lead agency, local partners, and stakeholders.

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### 1.1.2.1 TMCC Project - Lead Agency: Ride-On

Leading the San Luis Obispo County TMCC project will be United Cerebral Palsy/Ride-On Transportation (dba Ride-On; <http://www.ride-on.org/>) of San Luis Obispo. Started in 1993 by its parent organization, United Cerebral Palsy of San Luis Obispo, Ride-On is a non-profit organization dedicated to improving transportation services in San Luis Obispo County. Ride-On serves as the county's State of California-enabled and SLOCOG-designated Consolidated Transportation Service Agency (CTSA) which serves as the county's lead coordinated transportation agency and directly provides transportation services throughout the county.

### 1.1.2.2 TMCC Project - Local Project Partners:

As part of this MSAA project, Ride-On will partner with the following community mobility agency partners.

- **San Luis Obispo Regional Transit Authority (RTA).** RTA provides regional public transit services and complementary Americans with Disabilities Act (ADA) Paratransit services throughout San Luis Obispo County. RTA utilizes five (5) fixed routes to service the county and operates Monday-Sunday. To receive RTA ADA Paratransit services (known as Runabout), passengers must complete a doctor-approved application package stating that they are unable to ride fixed route to document their eligibility. Runabout-eligible riders can schedule rides for any purpose up to one week in advance and pay a zone-based fare. RTA is a key partner in the project. (<http://www.RTA.org/>), and will serve as the FTA grantee for this project.
- **Community Health Centers (CHC).** The CHC is federally funded network of health clinics that serve the County of San Luis Obispo. The CHC offers transportation assistance to patients who do not have a car and cannot use public transportation. (<http://www.communityhealthcenters.org/en/san-luis-obispo-casa-st.html>)
- **San Luis Obispo Council of Governments (SLOCOG).** SLOCOG serves as the Metropolitan Planning Organization and the regional ITS Architecture coordinator. SLOCOG also oversees the regional coordinated transportation planning process, CTSA management, and also provides FTA Section 5310 and 5311 funding recommendations to CalTrans.
- **San Luis Obispo (SLO) Regional Rideshare.** SLO Regional Rideshare is the official Mobility Management Agency for San Luis Obispo County and provides transportation information and referral to individuals through their 511 telephone service. SLO Regional Rideshare supports commuter, employer, student, and senior transportation options. SLO Regional Rideshare coordinates carpool and vanpool options throughout the county and urban area. (<http://www.rideshare.org/NewHome.aspx>).
- **Taxi Providers.** Ride-On will include the county's regional private transportation providers, such as Yellow Cab, as a participant in the MSAA project in developing the TMCC.

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- **Shuttle Service Providers: SLO Safe Ride, Smart Shuttle.** SLO Safe Ride and Smart Shuttle are private regional transportation providers operating in San Luis Obispo County.
- **Community Human Service Agencies.** There are a number of small community human service agencies in San Luis Obispo County. At the commencement of the project, Ride-On will contact all agencies that provide client transportation with their own vehicles to participate in the project.

### **1.1.2.3 TMCC Project - Other Advisory Project Partners:**

The TMCC project will also include additional advisory project partners from the United States Department of Transportation/Federal Transit Administration (FTA) – and its designees, SLO Transit, Cal Poly, 211 resource program, CalTrans, CenCal Health (Medi-Cal), the United States Department of Veterans Affairs, USDOT/Federal Highway Administration (FHWA), local municipalities, Amtrak, and others organizations as appropriate. These partners will provide input into the project through the Project Partner meetings and other ongoing communication initiatives.

### **3rd Party Project Contractor:**

Ride-On and RTA both leverage RouteMatch Software’s Intelligent Transportation Systems (ITS) technologies (computer aided dispatch and mobile data terminals) to manage their paratransit services. Other local partners do not currently utilize ITS for their paratransit data and resource management; relying on spreadsheets for this effort. Given the existing technology partnership between Ride-On, RTA, and RouteMatch Software, the TMCC partners plan to leverage this relationship to benefit the TMCC project. Given the ongoing partnership, Ride-On and TMCCAC project partners consider RouteMatch Software a "key party" who is essential to participate in the project and to serve as our staff “contractor” in assisting the project team to develop all required deliverables for the project.

### **1.1.3 San Luis Obispo MSAA TMCC – The Project**

Through the detailed mobility partnership that exists in San Luis Obispo County, Ride-On and community transportation partners have requested FTA MSAA funding and technical assistance to enable them to further coordinate their paratransit services through ITS. This effort will be accomplished by designing the TMCC through the systems engineering and institutional planning processes. Given that only Ride-On and RTA utilize custom off-the-shelf ITS for paratransit operations at this time, the agency partners will leverage their existing technology partner, RouteMatch Software, as a “key” 3rd party contractor and partner in the process to conduct the necessary systems engineering and planning tasks associated with the project.



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### **1.1.4 Current ITS System and Applications for Human Service Transportation (HST) Coordination:**

Ride-On and RTA have invested in transit ITS technologies to support the enhancement of customer service and to improve the efficiency and effectiveness of their operations. Ride-On and RTA leverage RouteMatch Software's Demand™ paratransit scheduling software and mobile data terminals/tablets. The RTA utilizes Connexionz software to manage their fixed route services. Other partners including CHC, SLO Regional Rideshare, SLOCOG, SLO Safe Rides, Yellow Taxi, and the VA utilize Personal Computers and software such as MS Excel, privately built dispatching systems (Yellow Cab), mobile applications (SLO Safe Rides), and paper for customer scheduling and data management. The proposed TMCC project will enable Ride-On and RTA to leverage their existing relationship with RouteMatch to research and address all issues in seeking to build an interoperable, scalable, and sustainable TMCC system that will benefit all providers in the region.

#### **1.1.4.1 Expected Project Outcomes**

The expected outcomes for the project will be (1) an opportunity for all transportation partners to explore institutional barriers and seek a common solution leveraging ITS to electronically link each other's databases and services in real-time while providing immediate information to customers; (2) the creation of a detailed set of system design documents on how to build, fund, and sustain the TMCC; (3) receive planning guidance on how to address any observed institutional coordination barriers; (4) demonstration of a Common Fleet Information Platform; and (5) provide all deliverables to FTA as requested in a timely manner.

## **1.2 Problem Statement and Opportunities**

The TMCC will provide the local transportation partners with the greater ability to meet additional customer same day paratransit ride requests and to provide customers with real-time access to paratransit services. Throughout the county, most transportation providers require between next day and one week in advance notice to schedule paratransit trips due to a lack of resources and agency policies. The TMCC project will enable transportation providers with the opportunity to communicate and monitor fleet assets in real-time with one another, provide for rapid scheduling of the eligible customer's mobility needs through a bidding process, notify the selected transportation provider, and communicate electronically and/or through automated trip confirmation call backs to customers. These opportunities will enable the TMCC to meet its focus of designing an interoperable, replicable, and scalable mobile technology system with the goal of coordinating paratransit and other specialized transportation passenger trips among partnering community transportation agencies and sharing this service information in real-time with the public.

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### 1.3 Project Description

The TMCC project seeks to enhance personal mobility through the design and demonstration of a Common Fleet Information Platform through the TMCC's real-time Ride Coordination System (RCS) for San Luis Obispo County. The TMCC's RCS will focus on providing real-time coordination information for all partnering agencies while enabling immediate information and mobility opportunities for customers through mobile communication.

### 1.4 Project Tasks and Deliverables

The following are major tasks, subtasks, and associated deliverables for each phase of the project. Note, underlined text (i.e. "Deliverable") signifies an FTA required project Deliverable per the 2014 FTA MSAA "Notice for Request for Proposals."

#### 1.4.1 Task 1.0 – Initial Project Management

- Subtasks.
  - 1.1 - The project team will receive award announcement from FTA.
  - 1.2 - Enter and set up reporting data in FTA TEAM/TRAMS (RTA/Ride-On).
  - 1.3 - Contract with RouteMatch Software ("key partner").

#### 1.4.2 Task 2.0 - Detailed Project Plan & Schedule (Deliverable 1)

- Subtasks:
  - 2.1 - Detailed Project Plan & Schedule – Create & Submit to FTA.
  - 2.2 - Receive FTA Feedback on Project Plan & Schedule.
  - 2.3 - Revise Project Plan & Schedule as needed.
  - 2.4 - MSAA project "Officially" commences with FTA approval of the Project Plan & Schedule (per FTA kick-off webinar on 10/26/15).
- Deliverable: Create a Detailed Project Plan and Schedule.

#### 1.4.3 Task 3.0 - TMCC Concept of Operations (Deliverable 2)

- Subtasks:
  - 3.1 - Hold "kick-off" Project Partner meeting – invite Advisory Project Partners.
  - 3.2 - Explore baseline conditions and review existing resources. Leverage regional reports/information either in process of or completed, including revised regional coordinated transportation plan.
  - 3.3 - Identify major project tasks.
  - 3.4 - Determine the roles and functions of the TMCC.
  - 3.5 - Hold public input forum for the project.
  - 3.6 - Identify user needs.
  - 3.7 - Document shortcomings in current transportation delivery area.
  - 3.8 - Describe operational policies and constraints. Identify where the policies and constraints differ – particularly as it relates to advance scheduling of passenger trips – among providers.

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- 3.9 - Address Regional ITS Architecture. Review and document the regional transit ITS architecture in development of the TMCC. The final TMCC recommended system should be incorporated into the regional ITS architecture.
- 3.10 - Complete written narrative for Concept of Operations (ConOps). Include a set of desired outcomes against which each partner agency can measure success/failure.
- 3.11 - Draft ConOps. Submit to FTA for review and feedback.
- 3.12 - Draft ConOps. Receive FTA Feedback.
- 3.13 - Draft ConOps. Revise as needed.
- 3.14 - Provide final ConOps to FTA.
- Deliverable: Create the TMCC Concept of Operations.

### 1.4.4 Task 4.0 - TMCC System Requirements (Deliverable 3)

- Subtasks:
  - 4.1 - Determine operational functions for the TMCC.
  - 4.2 - Determine performance requirements of the TMCC.
  - 4.3 - Ensure conformability with ITS Architecture.
  - 4.4 - Research and incorporate standards (where feasible).
  - 4.5 - Revisit and update the Concept of Operations (as needed).
  - 4.6 - Complete System Requirements Draft Deliverable.
  - 4.7 - Hold Project Partner meeting to review the Draft System Requirements.
    - 4.7.1 – Validate System Requirements using the following methods.
      - 4.7.1.1 - Elicit requirements from stakeholders.
      - 4.7.1.2 - Analyze the requirements.
      - 4.7.1.3 - Document the requirements.
      - 4.7.1.4 - Validate the requirements. Validation ensures that the requirements are necessary, verifiable (testable), attainable and clear
  - 4.8 - Draft System Requirements. Submit to FTA for review and feedback.
  - 4.9 - Draft System Requirements. Receive FTA Feedback.
  - 4.10 - Draft System Requirements. Revise as needed.
  - 4.11 - Provide final System Requirements to FTA.
- Deliverable: Complete System Requirements.

### 1.4.5 Task 5.0 - High Level System Design (Deliverable 4)

- Subtasks:
  - 5.1 - Explore and evaluate TMCC delivery options and their alternatives.
  - 5.2 - Identify each alternative's strengths & weaknesses.
  - 5.3 - Identify and evaluate compatibility and interface issues among elements.

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- 5.4 - Identify technical & operational feasibility and budget constraints, including on-going annual operational cost estimates for each partner agency. Develop a set of metrics to permit each agency to evaluate performance against desired outcomes.
- 5.5 - Ensure conformability with ITS Architecture.
- 5.6 - Complete Deliverable #4, MSAA System Design Report.
- 5.7 - Hold TMCCAC meeting to review/agree on System Design.
- 5.8 - Hold public forum to update the public on the project. Allow feedback into the TMCC system selection process.
- 5.9 - Seek acceptance of MSAA System Design Report from each partner agency policy board.
- 5.10 - Draft High Level System Design report. Submit to FTA for review and feedback.
- 5.11 - Draft High Level System Design report. Receive FTA Feedback.
- 5.12 - Draft High Level System Design report. Revise as needed.
- 5.13 - Submit final High Level System Design report to FTA.
- Deliverable: Complete High Level System Design.

### 1.4.6 Task 6.0 - TMCC Phased Implementation Plan (Deliverable 5)

- Subtasks:
  - 6.1 - Develop a task and timeline plan for implementing the TMCC
    - 6.1.1 - Include necessary detail, including milestones, specific task & roles.
  - 6.2 - Prepare Deliverable #5, TMCC Phasing Implementation Plan.
  - 6.3 - Draft TMCC Phasing Implementation Plan. Submit to FTA for review and feedback.
  - 6.4 - Draft TMCC Phasing Implementation Plan. Receive FTA Feedback.
  - 6.5 - Draft TMCC Phasing Implementation Plan. Revise as needed.
  - 6.6 - Submit final TMCC Phasing Implementation Plan to FTA.
- Deliverable: Complete Deliverable #5, TMCC Phasing Implementation Plan.

### 1.4.7 Task 7.0 - Common Fleet Information Platform (Deliverable 6)

- Note: this specific element of the overall TMCC project is yet to be defined by the Partners. As the Common Fleet Information Platform is further defined, additional details on its development will be included herein.
- Subtasks:
  - 7.1 - Project Management.
  - 7.2 - Project Professional Services & Integration.
  - 7.3 - Project Prototype & Testing.
  - 7.4 - Project Delivery.
- Deliverable: Prototype and Test a Common Fleet Information Platform.

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### 1.4.8 Task 8.0 - Prepare Draft Final Report & Briefings (Deliverable 7)

- Subtasks:
  - 8.1 - Prepare Pre Kick-off Meeting Briefing – submit to FTA.
  - 8.2 - Prepare Draft Final Report & Other Briefings – submit to FTA.
  - 8.3 - Revise Final Report & Briefings – submit to FTA.
- Deliverables: Briefings, Draft and Final Project Reports to FTA.

### 1.4.9 Task 9.0 - Other Deliverables/Meetings

- Subtasks:
  - 9.1 - Attend Project Kick-Off Meeting in Washington D.C. (webinar – 10/26/2015).
  - 9.2 - Work with Federal Interdisciplinary Technical Assistance (TA) Team.
  - 9.3 - Hold TMCCAC Meetings
  - 9.4 - Hold Public Information Forums (2)
- Deliverables: FTA MSAA kick-off meeting, Work with TA Team, Hold Partner meetings, and public information forums.

### 1.4.10 Task 10.0 - Oversight Review & FTA Monthly Reports

- Subtasks:
  - 10.1 - Oversight Review. The project team will provide daily, weekly, and monthly oversight of the project.
  - 10.2 - Monthly Progress Reports to FTA. The project team will provide monthly progress reports to FTA. The monthly reports shall include the following items:
    - Total budget and remaining budget;
    - Expenditures for the month in focus;
    - Estimated % of work completed;
    - Brief list of activities/deliverables completed that month;
    - Brief list of activities anticipated in the next month;
    - Variances from the current work plan, including planned corrective actions;
    - Brief list of outstanding issues/comments requiring USDOT attention; and
    - Status of each deliverable, including the outline, the draft (or items, version, and the final version).
- Deliverables: Project Oversight/Administration and Monthly Reports to FTA.

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### 1.5 Schedule of Tasks, Milestones, and Deliverables

Tables 1-1 and 1-2 illustrate the project’s schedule of tasks, milestone timeframe, and deliverables.

**Table 1-1. Task/Milestone Timeframe/Deliverable**

<b>Project Task/Milestone Timeframe/Deliverable</b>
<b>Task 1.0 – Initial Project Management</b> (July – January, 2015)
1.1 MSAA Award by FTA.
1.2 Enter and set up reporting data in FTA TEAM/TRAMS (RTA/Ride-On).
1.3 Develop & sign contracts (with FTA, local partners – as needed, and RouteMatch Software).
<b>Task 2.0 - Deliverable #1: Detailed Project Plan &amp; Schedule</b> (November 2015 - January 2016)
2.1 Detailed Project Plan & Schedule – Create & Submit to FTA.
2.2 Receive FTA Feedback on Project Plan & Schedule.
2.3 Revise Project Plan & Schedule as needed.
2.4 MSAA Project “Officially” Commences with FTA Approval of the Project Plan & Schedule.
<b>Task 3.0 - Deliverable #2: TMCC Concept of Operations</b> (January – April 2016)
3.1 Hold "kick-off" Project Partner meeting – invite Advisory Project Partners.
3.2 Explore baseline conditions and review existing resources.
3.3 Identify major tasks.
3.4 Determine the roles and functions of the TMCC.
3.5 Hold public input forum for the project.
3.6 Identify user needs.
3.7 Document shortcomings in current transportation delivery area.
3.8 Describe operational policies and constraints. Identify where the policies and constraints differ among providers.
3.9 Address Regional ITS Architecture.
3.10 Complete written narrative for Concept of Operations (ConOps).
3.11 Draft ConOps. Submit to FTA for review and feedback
3.12 Draft ConOps. Receive FTA Feedback
3.13 Draft ConOps. Revise as needed.
3.14 Provide final ConOps to FTA.
<b>Task 4.0 - Deliverable #3: TMCC System Requirements</b> (May – June 2016)
4.1 Determine operational functions for the TMCC.
4.2 Determine performance requirements of the TMCC.
4.3 Ensure conformability with ITS Architecture.
4.4 Research and incorporate standards (where feasible).
4.5 Revisit and update the Concept of Operations (as needed).
4.6 Complete System Requirements Draft Deliverable.
4.7 Hold Project Partner meeting to review Deliverable #3.
4.8 Draft System Requirements. Submit to FTA for review and feedback.

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<b>Project Task/Milestone Timeframe/Deliverable</b>
4.9 Draft System Requirements. Receive FTA Feedback.
4.10 Draft System Requirements. Revise as needed.
4.11 Provide final System Requirements to FTA.
<b>Task 5.0 - Deliverable #4: High Level System Design (July – August, 2016)</b>
5.1 Explore and evaluate TMCC delivery options and their alternatives.
5.2 Identify each alternative's strengths & weaknesses.
5.3 Identify and evaluate compatibility and interface issues among elements.
5.4 Identify technical & operational feasibility and budget constraints, including on-going annual operational cost estimates for each partner agency.
5.5 Ensure conformability with ITS Architecture.
5.6 Complete Deliverable #4, MSAA System Design Report.
5.7 Hold Project Partner meeting to review/agree on System Design.
5.8 Hold public forum to update the public on the project. Allow feedback into the TMCC system selection process.
5.9 Seek acceptance of MSAA System Design Report from each partner agency policy board.
5.10 Draft High Level System Design report. Submit to FTA for review and feedback.
5.11 Draft High Level System Design report. Receive FTA Feedback.
5.12 Draft High Level System Design report. Revise as needed.
5.13 Submit final High Level System Design Report to FTA.
<b>Task 6.0 - Deliverable #5: TMCC Phased Implementation Plan (September – October 2016)</b>
6.1 Develop a task and timeline plan for implementing the TMCC.
6.1.1 Include necessary detail, including milestones, specific task & roles.
6.2 Prepare Deliverable #5, TMCC Phasing Implementation Plan. Submit to FTA.
6.3 Draft TMCC Phasing Implementation Plan. Submit to FTA for review and feedback
6.4 Draft TMCC Phasing Implementation Plan. Receive FTA Feedback.
6.5 Draft TMCC Phasing Implementation Plan. Revise as needed.
6.6 Submit final TMCC Phasing Implementation Plan to FTA.
<b>Task 7.0 - Deliverable #6: Common Fleet Information Platform (October 2016 – June 2017)</b>
7.1 Project Management.
7.2 Project Professional Services & Integration.
7.3 Project Prototype & Testing.
7.4 Project Delivery.
<b>Task 8.0 - Deliverable #7: Prepare Draft Final Report &amp; Briefings (October 2015 - June 2017)</b>
8.1 Prepare Pre Kick-off Meeting Briefing – submit to FTA. (October 2015)
8.2 Prepare Draft Final Report & Other Briefings – submit to FTA. (May-June 2017)
8.3 Revise Final Report & Briefings – submit to FTA. (May-June 2017)

**San Luis Obispo County Travel Management Coordination Center (TMCC)**

<b>Project Task/Milestone Timeframe/Deliverable</b>
<b>Task 9.0 - Other Deliverables/Meetings</b> (October 2015 – June 2017)
9.1 Attend Project Kick-Off Meeting in Washington D.C. (revised - webinar: 10/26/2015)
9.2 Work with Federal Interdisciplinary Technical Assistance Team.
9.3 Hold TMCCAC Meetings.
9.4 Hold Public Information Forums (2).
<b>Task 10.0 - Oversight Review &amp; FTA Monthly Reports</b> (September 2015 – January 2017)
10.1. Oversight Review. <ul style="list-style-type: none"> <li>• The project team will provide ongoing monitoring and oversight of the project.</li> </ul>
10.2. Monthly Progress Reports to FTA. The project team will provide monthly progress reports to FTA. The monthly reports shall include the following items: <ul style="list-style-type: none"> <li>• Total budget and remaining budget</li> <li>• Expenditures for the month in focus</li> <li>• Estimated % of work completed</li> <li>• Brief list of activities/deliverables completed that month</li> <li>• Brief list of activities anticipated in the next month</li> <li>• Variances from the current work plan, including planned corrective actions</li> <li>• Brief list of outstanding issues/comments requiring USDOT attention</li> <li>• Status of each deliverable, including the outline, the draft and the final version</li> </ul>



## San Luis Obispo County Travel Management Coordination Center (TMCC)

### Table 1-2. Deliverables Schedule

Task	Organization(s) Responsible	Task Completion Deadline
<b>Task 1.0 - Project Management</b>		January 31, 2016
1.1 MSAA Award.	Ride-On	July 2015
1.2 Enter and set up reporting data in FTA TEAM/TRAMS.	Ride-On, SLORTA, FTA	August 2015
1.3 Develop & sign contracts.	Ride-On, FTA, RM	January 2016
<b>Task 2.0 - Deliverable #1: Detailed Project Plan &amp; Schedule</b>		<b>January 31, 2016</b>
2.1 Detailed Project Plan & Schedule – Create & Submit to FTA.	Ride-On, RM	November 30, 2015
2.2 Receive FTA Feedback on Project Plan & Schedule.	FTA	December 2015
2.3 Revise Project Plan & Schedule as needed.	Ride-On	January 8, 2016
2.4 MSAA Project “Officially” Commences with FTA Approval of the Project Plan & Schedule.	FTA	January 2016
<b>Task 3.0 - Deliverable #2: TMCC Concept of Operations</b>		<b>April 29, 2016</b>
3.1 Hold "kick-off" Project Partner meeting.	TMCCAC	January 2016
3.2 Explore baseline conditions and review existing resources.	Ride-On, RM	January 2016
3.3 Identify major tasks.	Ride-On, RM	January-February 2016
3.4 Determine the roles and functions of the TMCC.	Ride-On, RM	January-February 2016
3.5 Hold public input forum for the project.	Ride-On, RM	January-February 2016
3.6 Identify user needs.	Ride-On, RM	January-February 2016
3.7 Document shortcomings in current transportation delivery area.	Ride-On, RM	February 2016
3.8 Describe operational policies and constraints. Identify where the policies and constraints differ among providers.	Ride-On, RM	February 2016
3.9 Address Regional ITS Architecture.	Ride-On, RM	March 2016
3.10 Complete written narrative for Deliverable #2.	Ride-On, RM	March-April 2016
3.11 Draft ConOps. Submit to FTA for review and feedback.	Ride-On, FTA	April 29, 2016
3.12 Draft ConOps. Receive FTA Feedback.	Ride-On, FTA	May 2016
3.13 Draft ConOps. Revise as needed.	Ride-On, RM	May 2016
3.14 Provide final ConOps to FTA.	Ride-On	May 2016
<b>Task 4.0 - Deliverable #3: TMCC System Requirements</b>		<b>June 30, 2016</b>
4.1 Determine operational functions for the TMCC.	Ride-On, RM	May 2016
4.2 Determine performance requirements of the TMCC.	Ride-On, RM	May 2016
4.3 Ensure conformability with ITS Architecture.	Ride-On, RM	May 2016
4.4 Research and incorporate standards (where feasible).	Ride-On, RM	May 2016
4.5 Revisit and update the Concept of Operations (as needed).	Ride-On, RM	May 2016
4.6 Complete System Requirements Draft Deliverable.	Ride-On, RM	June 2016
4.7 Hold TMCCAC meeting to review Deliverable #3.	TMCCAC	June 2016
4.8 Draft System Requirements. Submit to FTA for review and feedback.	Ride-On, FTA	June 2016
4.9 Draft System Requirements. Receive FTA Feedback.	Ride-On, FTA	July 2016

## San Luis Obispo County Travel Management Coordination Center (TMCC)

Task	Organization(s) Responsible	Task Completion Deadline
4.10 Draft System Requirements. Revise as needed	Ride-On, RM	July 2016
4.11 Provide final System Requirements to FTA.	Ride-On	July 2016
<b>Task 5.0 - Deliverable #4: High Level System Design</b>		<b>August 30, 2016</b>
5.1 Explore and evaluate TMCC delivery options and their alternatives.	RM	July 2016
5.2 Identify each alternative's strength & weakness.	RM	July 2016
5.3 Identify and evaluate compatibility and interface issues among elements.	RM	July 2016
5.4 Identify technical & operational feasibility and budget constraints.	RM	July 2016
5.5 Ensure conformability with ITS Architecture.	RM	July 2016
5.6 Complete Deliverable #4, MSAA System Design Report.	Ride-On, RM	July 2016
5.7 Hold TMCCAC meeting to review/agree on System Design.	TMCCAC	July 2016
5.8 Hold public forum to update the public on the project. Allow feedback into the TMCC system selection process.	TMCCAC	July 2016
5.9 Seek acceptance of MSAA System Design Report from each partner agency policy board.	Ride-On, TMCCAC	July 2016
5.10 Draft High Level System Design report. Submit to FTA for review and feedback.	Ride-On, FTA	July 2016
5.11 Draft High Level System Design report. Receive FTA Feedback.	Ride-On, FTA	August 2016
5.12 Draft High Level System Design report. Revise as needed.	Ride-On, RM	August 2016
5.13 Submit final System Design Report to FTA. Revise as needed.	Ride-On	August 2016
<b>Task 6.0 - Deliverable #5: TMCC Phased Implementation Plan*</b>		<b>October 31, 2016</b>
6.1 Develop a task and timeline plan for implementing the TMCC.	Ride-On, RM	September 2016
6.1.1 Include necessary detail, including milestones, specific task & roles.	Ride-On, RM	September 2016
6.2 Complete Deliverable #5, TMCC Phasing Implementation Plan.	Ride-On, RM	October 2016
6.3 Draft TMCC Phasing Implementation Plan. Submit to FTA for review and feedback.	Ride-On, FTA	October 2016
6.4 Draft TMCC Phasing Implementation Plan. Receive FTA Feedback.	Ride-On, FTA	November 2016
6.5 Draft TMCC Phasing Implementation Plan. Revise as needed.	Ride-On, RM	November 2016
6.6 Submit final TMCC Phasing Implementation Plan to FTA.	Ride-On	November 2016
<b>Task 7.0 - Deliverable #6: Common Fleet Information Platform</b>		<b>June 30, 2017</b>
7.1 Project Management.	Ride-On, RM	October 2016 - June 2017
7.2 Project Professional Services & Integration.	RM	March 2017
7.3 Project Prototype & Testing.	RM	April 2017
7.4 Project Delivery.	RM	June 2017
<b>Task 8.0 - Deliverable #7: Prepare Draft Final Report &amp; Briefings – submit to FTA</b>		<b>June 30, 2017</b>
8.1 Prepare Pre Kick-off Meeting Briefing – submit to FTA.	Ride-On, SLRTA	October 2016
8.2 Prepare Draft Final Report & Other Briefings – submit to FTA.	Ride-On, RM	June 2017
8.3 Revise Final Report & Briefings – submit to FTA.	Ride-On, RM	July 2017

## San Luis Obispo County Travel Management Coordination Center (TMCC)

Task	Organization(s) Responsible	Task Completion Deadline
<b>Task 9.0 - Other Deliverables/Meetings</b>		<b>See Below</b>
9.1. Attend Project Kick-Off Meeting in Washington D.C. (Revised: Webinar)	Ride-On, SLORTA, RM	October 26, 2015
9.2 Work with Federal Interdisciplinary Technical Assistance Team.	Ride-On, RM, TMCCAC	Monthly
9.3 TMCCAC Meetings. (see tasks above)	TMCCAC	Quarterly
9.4 Hold Public Information Forums (2).	Ride-On, TMCCAC, Public	February/March and July/August, 2016
<b>Task 10.0 - Oversight Review &amp; FTA Monthly Reports</b>	Ride-On, SLORTA FTA	Daily, Monthly

### 1.6 Budget

The cost for the TMCC project, featuring the real-time Ride Coordination System, is estimated to be \$180,725, including \$141,725 federal and \$39,000 non-federal matching grant sources. The non-federal matching grant source for this project will come from a cash match (\$24,000) from the Ride-On Transportation agency budget and in-kind staff time contribution (\$15,000). The local match sources are in compliance with the elements listed in the 2014 MSAA RFP. All expenses encumbered during the development of this project will be fully documented and in compliance with United States Department of Transportation, Federal Transit Administration as illustrated in Section 3.2.3.

#### 1.6.1 Budget and Cost Estimates by Task:

The project described in this Project Management Plan is based on the resources of two primary partners within the Project Management Team and TMCCAC. Both Ride-On and RouteMatch Software have specific tasks assigned to complete and have different cost rates. The total cost for project management and consulting services (labor and burden) is \$163,725 and all other expenses total \$17,000 for the project. The project's total expenses by category, including hourly and other costs, are listed as Table 1-3. The project's expenses by Task are listed as Table 1-4.

##### 1.6.1.1 Project Management & Consulting Services (Labor and Burden):

- Ride-On: This project includes two (2) primary Ride-On staff to be utilized in the development of this project. Since each staff member has different fully allocated cost rates, the Ride-On project management (labor and burden) rate is averaged at \$75 per hour for this project. These rates include salary, fringe benefits, and other indirect costs. The Ride-On project management and other expenses for the project are listed in Tables 1-3 and 1-4.

## **San Luis Obispo County Travel Management Coordination Center (TMCC)**

- **RouteMatch Software:** As referenced in the original proposal, this project includes four (4) primary RouteMatch staff to be utilized in the development of this project. Since each staff member has different fully allocated cost rates, the RouteMatch consulting services (labor and burden) rate is averaged at \$130 per hour for this project. This rate includes salary, fringe benefits, and other indirect costs. The RouteMatch total other expenses for the project is totaled by task in Tables 1-3 and specific project responsibilities are listed in Table 2-1, Staffing Plan.

### **1.6.1.2 Other Expenses:**

Per the original project proposal, the Other Expenses for this project include travel, copying services, supplies, and Section 508 compliance. The following includes details for each category of Other Expense and are listed in Tables 1-3 and 1-4.

- **Travel Expenses.** The travel and associated per diem expenses for estimated 2-3 primary team members is \$15,000. Costs charged to the project will not exceed each partner's normal travel expense costs.
- **Copying Services.** Estimated costs for this category are \$500 and include the printing of special reports and other items for the TMCC Advisory Committee, stakeholders, public meetings, USDOT, FTA, and all other needs.
- **Supplies.** It is expected that expenses for this category will be \$500 and include the meeting support, binders, staples, and other items.
- **Document Alternative Format – Section 508 Compliance.** As required of the project, all final documents will be prepared in alternative formats compliant with Section 508. It is expected that costs for this category will be \$1,000.

### **1.6.2 Budget by Fiscal Year**

The total budget of the project is \$180,725. The budget breakdown by Federal fiscal year is as follows:

- FY 2015: \$0
- FY 2016: \$104,260
- FY 2017: \$76,465

## San Luis Obispo County Travel Management Coordination Center (TMCC)

### 1.6.3 Budget by Category

Table 1-3 illustrates the budget breakdown by category.

**Table 1-3. Project Budget by Category**

<b>Budget Category</b>	<b>FTA Amount (\$)</b>	<b>Total Amount (\$)</b>
Project Management	\$34,525	\$46,725
Consulting Services	\$93,600	\$117,000
Travel	\$12,000	\$15,000
Copy Services	\$400	\$500
Supplies	\$400	\$500
508 Compliance	\$800	\$1,000
<b>TOTAL</b>	<b>\$141,725</b>	<b>\$180,725</b>

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### 1.6.4 Budget by Task

Table 1-4 illustrates the budget breakdown by task.

**Table 1-4. Project Budget by Task**

Task	Overall Total Hourly Expenses*	Total Other Expenses	Total ALL Expenses
<b>Task 1.0 - Project Management</b>	\$ 2,150	\$ -	\$ 2,150
1.1 MSAA Award.	\$ -		\$ -
1.2 Develop & sign contracts.	\$ 1,400		\$ 1,400
1.3 Enter and set up reporting data in FTA TEAM/TRAMS.	\$ 750		\$ 750
<b><u>Task 2.0 - Deliverable #1: Detailed Project Plan &amp; Schedule</u></b>	<b>\$ 5,460</b>	<b>\$ -</b>	<b>\$ 5,460</b>
2.1 Detailed Project Plan & Schedule – Create & Submit to FTA.	\$ 4,360		\$ 4,360
2.2 Receive FTA Feedback on Project Plan & Schedule.	\$ -		\$ -
2.3 Revise Project Plan & Schedule as needed.	\$ 1,100		\$ 1,100
2.4 MSAA Project “Officially” Commences with FTA Approval of the Project Plan & Schedule.	\$ -		\$ -
<b><u>Task 3.0 - Deliverable #2: TMCC Concept of Operations</u></b>	<b>\$ 48,050</b>	<b>\$ 3,000</b>	<b>\$ 51,050</b>
3.1 Hold "kick-off" technical advisory committee meeting.	\$ 5,950	\$ 3,000	\$ 8,950
3.2 Explore baseline conditions and review existing resources.	\$ 3,575		\$ 3,575
3.3 Identify major tasks	\$ 2,050		\$ 2,050
3.4 Determine the roles and functions of the TMCC	\$ 2,050		\$ 2,050
3.5 Hold public input forum for the project	\$ 6,025		\$ 6,025
3.6 Identify user needs	\$ 5,500		\$ 5,500
3.7 Document shortcomings in current transportation service area	\$ 5,575		\$ 5,575
3.8 Describe operational policies and constraints. Identify where the policies and constraints differ among providers.	\$ 8,175		\$ 8,175
3.9 Address Regional ITS Architecture	\$ 2,975		\$ 2,975

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Task	Overall Total Hourly Expenses*	Total Other Expenses	Total ALL Expenses
3.10 Complete written narrative for Deliverable #2	\$ 2,975		\$ 2,975
3.11 Provide Del. #2 to FTA for Comment. Revise as needed.	\$ 3,200		\$ 3,200
3.12 Draft ConOps. Receive FTA Feedback	\$ -		\$ -
3.13 Draft ConOps. Revise as needed.	\$ -		\$ -
3.14 Provide final ConOps to FTA.	\$ -		\$ -
<b>Task 4.0 - Deliverable #3: TMCC System Requirements</b>	<b>\$ 21,780</b>	<b>\$ 2,000</b>	<b>\$ 23,780</b>
4.1 Determine operational functions for the TMCC.	\$ 6,925		\$ 6,925
4.2 Determine performance requirements of the TMCC.	\$ 4,875		\$ 4,875
4.3 Ensure conformability with ITS Architecture.	\$ 1,975		\$ 1,975
4.4 Research and incorporate standards (where feasible).	\$ 1,900		\$ 1,900
4.5 Revisit and update the Concept of Operations (as needed).	\$ 225		\$ 225
4.6 Complete written element for Deliverable #3.	\$ 3,200		\$ 3,200
4.7 Hold TMCCAC meeting to review Deliverable #3.	\$ 2,680	\$ 2,000	\$ 4,680
4.8 Draft System Requirements. Submit to FTA for review and feedback.	\$ -		\$ -
4.9 Draft System Requirements. Receive FTA Feedback.	\$ -		\$ -
4.10 Draft System Requirements. Revise as needed.	\$ -		\$ -
4.11 Provide final System Requirements to FTA.	\$ -		\$ -
<b>Task 5.0 - Deliverable #4: High Level System Design</b>	<b>\$ 18,620</b>	<b>\$ 1,000</b>	<b>\$ 19,620</b>
5.1 Explore and evaluate TMCC delivery options & alternatives	\$ 2,050		\$ 2,050
5.2 Identify each alternative's strength & weakness	\$ 1,975		\$ 1,975
5.3 Identify and evaluate compatibility & interface issues among elements	\$ 1,450		\$ 1,450
5.4 Identify technical & operational feasibility and budget constraints, including on-going annual operational cost estimates for each partner agency	\$ 4,650		\$ 4,650

## San Luis Obispo County Travel Management Coordination Center (TMCC)

Task	Overall Total Hourly Expenses*	Total Other Expenses	Total ALL Expenses
5.5 Ensure conformability with ITS Architecture.	\$ 1,675		\$ 1,675
5.6 Complete Deliverable #4, MSAA System Design Report	\$ 1,825		\$ 1,825
5.7 Hold TMCCAC meeting to review/agree on System Design	\$ 2,680	\$ 1,000	\$ 3,680
5.8 Hold public forum to update the public on the project	\$ 1,120		\$ 1,120
5.9 Seek policy boards' acceptance of System Design Report	\$ 0		\$ 0
5.10 Draft High Level System Design report. Submit to FTA for review and feedback.	\$ 0		\$ 0
5.11 Draft High Level System Design report. Receive FTA Feedback.	\$ 0		\$ 0
5.12 Draft High Level System Design report. Revise as needed.	\$ 0		\$ 0
5.13 Submit final System Design Report to FTA. Revise as needed.	\$ 1,195		\$ 1,195
<b><u>Task 6.0 - Deliverable #5: TMCC Phased Implementation Plan</u></b>	<b>\$ 2,200</b>	<b>\$ -</b>	<b>\$ 2,200</b>
6.1 Develop a task and timeline plan for implementing the TMCC	\$ -		\$ -
6.1.1 Include detail, including milestones, specific task & roles	\$ 820		\$ 820
6.2 Prepare Deliverable #5, TMCC Phasing Implementation Plan	\$ 1,380		\$ 1,380
6.3 Draft TMCC Phasing Implementation Plan. Submit to FTA for review and feedback	\$ 0		\$ 0
6.4 Draft TMCC Phasing Implementation Plan. Receive FTA Feedback.	\$ 0		\$ 0
6.5 Draft TMCC Phasing Implementation Plan. Revise as needed.	\$ 0		\$ 0
6.6 Submit final TMCC Phasing Implementation Plan to FTA.	\$ 0		\$ 0
<b><u>Task 7.0 - Deliverable #6: Common Fleet Information Platform</u></b>	<b>\$ 40,590</b>	<b>\$ 6,000</b>	<b>\$ 46,590</b>
7.1 Project Management	\$ 7,100		\$ 7,100
7.2 Project Professional Services & Integration	\$ 15,240		\$ 15,240
7.3 Project Prototype & Testing	\$ 7,820	\$ 3,000	\$ 10,820
7.4 Project Delivery	\$ 10,430	\$ 3,000	\$ 13,430



## San Luis Obispo County Travel Management Coordination Center (TMCC)

Task	Overall Total Hourly Expenses*	Total Other Expenses	Total ALL Expenses
<b><u>Task 8.0 - Deliverable #7: Prepare Draft Final Report &amp; Briefings</u></b>	\$ 4,600	\$ 1,000	\$ 5,600
8.1 Prepare Pre Kick-off Meeting Briefing – submit to FTA	\$ 430		\$ 430
8.2 Prepare Draft Final Report & Other Briefings – submit to FTA	\$ 3,350	\$ 1,000	\$ 4,350
8.3 Revise Final Report & Briefings – submit to FTA	\$ 820		\$ 820
<b><u>Task 9.0 - Other Deliverables/Meetings</u></b>	\$ 16,150	\$ 4,000	\$ 20,150
9.1. <u>Attend Project Kick-Off Meeting in Washington D.C.</u>	\$ 6,950	\$ 3,000	\$ 9,950
9.2. <u>Work with Federal Technical Assistance Team</u>	\$ 5,600		\$ 5,600
9.3. TMCCAC Meetings	\$ 3,000	\$ 500	\$ 3,500
9.4. Hold Public information forums (2)	\$ 600	\$ 500	\$ 1,100
<b><u>Task 10.0 - Oversight Review &amp; FTA Monthly Reports</u></b>	\$ 4,125	\$ -	\$ 4,125
	<b>Overall Total Hourly Cost*</b>	<b>Total Other Expenses</b>	<b>Total ALL Expenses</b>
	\$ 163,725	\$ 17,000	\$ 180,725

Note: Underlined Tasks = FTA RFP Required Deliverable.

\* Hourly Costs = Project Management and Consulting expenses

### 1.7 Evolution of the Project Management Plan

To be an effective management and communication tool, the Project Management Plan (PMP) must be a living document that is updated as conditions change. At a minimum, the San Luis Obispo County TMCC/Ride-On project management team will review the PMP quarterly, and as major milestones are achieved. The version changes for the PMP are recorded in Appendix A.

## San Luis Obispo County Travel Management Coordination Center (TMCC)

### 1.8 Reference Materials

The following Reference Materials were used in the development of this Project Management Plan.

- Draft MSAA Project Management Plan Template, Federal Transit Administration, October 2015.
- Statement of Work, San Luis Obispo County Travel Management Coordination Center (TMCC) MSAA Deployment Planning, Ride-On Transportation and San Luis Obispo Regional Transit Authority, August 2015.
- San Luis Obispo County Travel Management Coordination Center (TMCC) Applicant and Proposal Profile, MSAA Deployment Planning Proposal, United Cerebral Palsy of San Luis Obispo County/Ride-On Transportation, July 2014.
- Mobility Service for All Americans Deployment Planning “Notice for Request for Proposals,” Federal Transit Administration, May 2014
- MSAA Project Plan Revised for FTA, Lower Savannah Council of Governments, August 2007.
- Detailed Project Plan, Paducah Area Transit System (PATS) Demonstration of Enhanced Human Service Transportation Models: Phase 1 - System Development and Design, Paducah Area Transit System, August 2007.

## **2 PROJECT ORGANIZATION**

### **2.1 Organizational Structure**

The San Luis Obispo County TMCC project will be overseen by Mark Shaffer, Executive Director, Ride-On Transportation, who will serve as Project Manager and be responsible for all work. The TMCC project will also feature the support services of Ride-On's Jason Portugal, who manages all technology services for the agency. Mr. Shaffer will oversee and coordinate the TMCC project work, including the management of all stakeholders, TMCCAC meetings and committee responsibilities, technical consultants, and carrying out the day-to-day responsibilities of managing the completion of the project's tasks and deliverables on time. Todd Allen, RouteMatch Software, will serve as the lead staff for the technical consulting firm. Ride-On management and the technical consulting team also plans to utilize the FTA staff and interdisciplinary technical assistance team's assistance.

In addition, Ride-On's community transportation partner and MSAA grantee for this project, RTA, has similar experience in managing and implementing ITS technology projects for both paratransit and fixed route operations. The RTA's Executive Director, Geoff Straw, will serve as a lead project contact along with staff support from RTA Grants Manager Omar McPherson. RTA will also provide grant administration oversight.

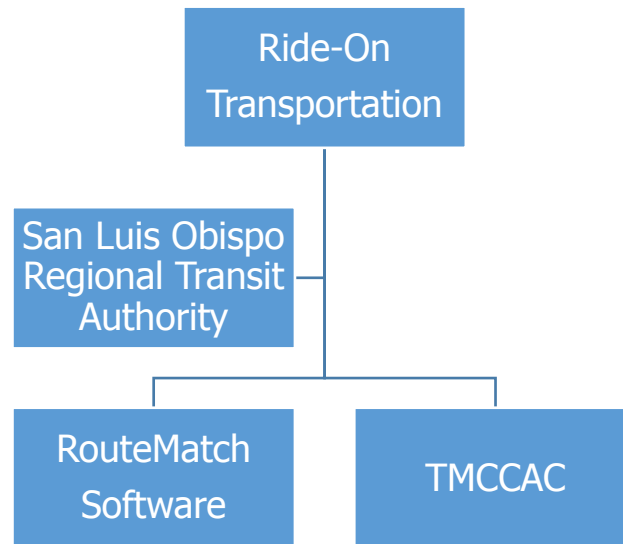
Also, the project's Partners will serve in a project advisory role upon commencement and as key milestones are reached. The TMCCAC will include all members of the project, such as Community Health Centers, SLO Regional Rideshare, SLOCOG, SLO Safe Rides, Yellow Cab, regional shuttle service/taxi providers, and others. To facilitate task completion, the TMCCAC will have the following subcommittee structure to address issues and subjects throughout the project. Ride-On will oversee the administration of the TMCCAC and committees.

#### **TMCCAC Committees:**

- Transportation Providers;
- Human Service Organizations; and
- Technology Solutions.

Figure 2-1 graphically illustrates the local project management organization chart for the San Luis Obispo County TMCC.

Figure 2-1. Local Project Management Organization Chart



## 2.2 Team Roles and Responsibilities

The following are members of the TMCC Project Management Team along with their respective project roles and responsibilities.

- **Ride-On Transportation:** Serves as overall lead agency for the MSAA project, including project management, partner communications, report preparation, consultant management, and day-to-day project oversight.
- **San Luis Obispo Regional Transit Authority (RTA):** Lead Partner, designated MSAA grantee to FTA, project support, and FTA TEAM/TrAMS manager.
- **RouteMatch Software:** Provide staff and technology support under contract to the project.
- **Advisory Role - TMCCAC:**
  - The project's supporting core partners, known as the TMCCAC, will provide regular guidance and advice on its development and deployment. The TMCCAC will include all members of the project, such as Community Health Centers, SLO Regional Rideshare, SLOCOG, SLO Safe Rides, Yellow Cab, regional shuttle service/taxi providers, and others. The TMCCAC will advise the project throughout its life and feature three (3) committees to assist with task completion and address complex issues. The TMCCAC will also seek to assist the development of the TMCC through short and long-term sustainable coordination opportunities.

## San Luis Obispo County Travel Management Coordination Center (TMCC)

### 2.3 Staffing Plan

Table 2-1 illustrates the San Luis Obispo County TMCC project’s staffing plan. This plan identifies the principal tasks and functions in which key staff will be involved in the project.

**Table 2-1. Staffing Plan**

Organization	Name	Position	Project Tasks	Role/Function
<b>Ride-On Transportation</b>	Mark Shaffer	Executive Director	<ul style="list-style-type: none"> <li>Project Management</li> <li>TMCCAC &amp; Partner Communications</li> <li>Report Preparation</li> <li>Consultant management</li> <li>Day-to-day project oversight</li> </ul>	Oversee all project activities.
	Jason Portugal	Technology Coordinator	<ul style="list-style-type: none"> <li>Provide necessary project support</li> <li>Review all deliverables for technical accuracy</li> <li>Provide local technology solution expertise</li> </ul>	Provide project management and support.
<b>San Luis Obispo RTA</b>	Geoff Straw	Executive Director	<ul style="list-style-type: none"> <li>Provide support and expertise with regional transit ITS needs.</li> <li>Overall lead contact for RTA.</li> </ul>	Project management support and lead staff for RTA.
	Omar McPherson	Grants Coordinator	<ul style="list-style-type: none"> <li>Project contact for RTA.</li> <li>MCAA grant administrator for FTA.</li> <li>Enter all items in TEAM/ TrAMS as needed.</li> </ul>	Project contact for RTA and overall grant administrator for FTA.
<b>RouteMatch Software</b>	Todd Allen	Director of Government & Community Relations	<ul style="list-style-type: none"> <li>Serve as lead staff contact for RouteMatch.</li> <li>Provide technical assistance in completing deliverables and support to Ride-On.</li> <li>Participate in all project update and local Partner meetings.</li> </ul>	Lead staff, provide technical assistance, and serve as project advisor.
	Tom Coogan	Vice President	<ul style="list-style-type: none"> <li>Provide executive sponsorship.</li> <li>Provide project expertise and technology solutions.</li> </ul>	Provide executive sponsorship and project support.
	Joe Hewes	Executive Vice President	<ul style="list-style-type: none"> <li>Ensure the provision of an accurate project technology solution.</li> <li>Provide development leadership and scope setting within RouteMatch.</li> </ul>	Provide technology guidance and development support.
	Brandon Fowler	Project Management	<ul style="list-style-type: none"> <li>Project management.</li> <li>Technology training and implementation services.</li> </ul>	Provide project management and training services.

### 3 PROJECT MONITORING AND CONTROL

#### 3.1 Coordination and Communications

While the project involves federal, technical assistance, and local team members, timely and close communication between the FTA project manager, Ride-On project management team, and the FTA's MSAA project independent evaluation team is critical for the project's success. The respective project managers will communicate frequently regarding all aspects of the project via email, phone calls, and meetings.

The following sections describe the proposed mechanisms for communicating and coordinating between the various management partners involved in the project. Meetings may be conducted in person, by conference call, or webinar.

##### 3.1.1 Internal Communications and Meeting Plan (San Luis Obispo County team)

The following is an overview of Ride-On, Project Management Team, and TMCCAC communications and meeting plan.

- **Ride-On:**
  - Communication.
    - Internal Meetings. Hold bi-weekly meetings of project management staff to review project status.
    - Contractor Oversight. Maintain routine communications with RouteMatch Software as needed.
    - Project Management Communication. Maintain regular project discussion with RTA staff.
  - TMCCAC.
    - Routine Updates. Provide e-mail or verbal updates to all TMCCAC partners on a routine 2-4 week basis.
    - Website. Create a project website to provide all Partners with updates and information regarding the project.
  - FTA Monthly Reports and Reimbursement Requests. Provide all necessary information to RTA for inclusion in TEAM or TrAMS for the FTA.
  - Memorandum of Understanding (MOU). Ride-On will lead the development of all MOU's (or inter-agency agreements) as determined throughout the project (i.e. partnership requirements, operational agreements, data sharing, etc.).
- **Project Management Team:**
  - Monthly project status meetings. Hold to ensure task completion and review deliverable completion status. Bi-weekly or other scheduled meetings will be held to discuss project status updates as needed.

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- **TMCCAC:**

- FTA Site Visit – December 15, 2015. Received an overview of the project, provide an update on partner activities, available technology in use by Partners, discussed federal technical assistance, and addressed the January meeting.
- Initial “formal” Project Kick-off meeting – January 2016. This meeting will provide a formal overview of the project, a review of the December 2015 meeting with FTA, and discuss project goals and expectations, specifically the project approach, tasks and deliverables, partner roles and responsibilities, staffing plan, schedule, and budget.
- Quarterly Meetings. The project management staff will provide dedicated quarterly meetings with all TMCCAC, including those as designated as project tasks.
- Committees. The TMCCAC will feature three (3) committees with a focus on addressing specific issues and items related to Transportation Providers; Human Service Organizations; and Technology Solutions.

### 3.1.2 External Communication (with FTA/Technical Assistance Team)

Ride-On and the TMCCAC considers its communication with FTA and the technical assistance team to be critical. The following are brief communication strategies for the Ride-On team with FTA and the technical assistance teams.

- **FTA:**

- Project Updates – Monthly (electronic). Provided through RTA and TEAM/TrAMS, these updates will provide all detailed information updates as required in the project plan.
- Project Updates.
  - FTA Designated Meetings. The Ride-On team will be available to participate in all FTA designated MSAA project meetings.
  - Conference Calls. The Ride-On project team will coordinate any update meetings by conference call with FTA as often as preferred.
- Partner Meetings. FTA will be invited to participate in all Project Partner meetings as scheduled. We will also seek to make available conference call capability as well.
- Requests for information. The Ride-On project team will respond diligently to all FTA requests for information.

- **Technical Assistance Team:**

- Technical Assistance (TA) support. The Ride-On project team will leverage the TA team for all assistance support of the project as needed.
- Requests for information. The Ride-On project team will respond diligently to all TA team requests for information.

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### **3.2 Scope, Schedule and Budget Management**

The following sections outline the approach for managing the project scope, schedule, and budget.

#### **3.2.1 Scope Management**

The TMCC project's scope will be monitored and reviewed by the Ride-On project manager on a daily, weekly, and monthly basis to ensure the project remains on task and schedule. Should any adjustments in scope be required, the Ride-On project manager will first address the issue with the local project management team and then with the FTA project manager, as needed. Should a formal TMCC scope change be required, the local project management team will complete an FTA cooperative agreement revision/amendment for any material changes in the work scope. This is in accordance with FTA Circular 6100.1E (IV.6).

#### **3.2.2 Schedule Management**

The Ride-On project manager will review the project schedule on a weekly and monthly basis (as illustrated in Table 1-4 of this Project Management Plan) to ensure the project remains on schedule for task and Deliverable completion. The Ride-On project manager will also meet with the project management team on a routine basis to ensure the project schedule is being met.

Should any minor schedule adjustments be necessary, including those that do not affect the overall project schedule/timeframe, they shall be approved by the Ride-On project manager in consultation with the FTA project manager. Significant schedule changes will be decided by the project management team and then elevated to FTA for review and approval. A significant schedule change may be accomplished via an administrative amendment as outlined in FTA Circular 6100.1E (IV.6).

#### **3.2.3 Cost/Budget Management**

The TMCC costs and budget will be managed by the Ride-On project manager following Federal regulations/rules and internal contract rules. Following the local project management team process, invoices will be submitted by Ride-On to RTA (recipient) for payment after the Ride-On project manager reviews the project progress, schedule, and expenditures. Payments will be based on progress (costs incurred for a period of time) or milestone completion. Requests for payments will be conducted in accordance with FTA Circular 6100.1E (V.8).

It is not anticipated that the budget for this project will change. However, should any need for budget revisions, if any, will be conducted in accordance with FTA Circular 6100.1E (IV.6). The request for a budget increase has to be approved by the FTA.



### **3.3 Change Management**

Depending on the level of modification, all major proposed project document changes will be approved by the Ride-On project manager and shared with the project management team for review and comment. The proposed changes will then be finalized and shared with the FTA as appropriate. All project documents will contain a Version Changes section (such as in Appendix A of this PMP) to signify the current version.

### **3.4 Quality Management**

The level of quality, as delivered by all partners associated with the tasks and Deliverables for all elements of the TMCC project, are expected to be high. Should any portion of the project not be of high quality, members of the project management team and FTA will be encouraged to bring this information to the Ride-On project manager. During the initial partner project meetings in January 2016, the expectation of high quality work associated with this project will be discussed.

### **3.5 Risk Management**

Risk management is of critical importance to the TMCC project team. Once the final PMP is approved by FTA and the project “officially” commences, over the 18-month life of the TMCC project there is the potential for internal and external factors that could impact the schedule or budget of the project, as well as expected measures to mitigate such outcomes. In this risk management plan, the Ride-On project manager and project management team will seek to control the development of the TMCC tasks and deliverables to avoid potential risks.

In developing this risk management component of the PMP, Table 3-1 below illustrates potential risks and possible mitigation measures that may occur during the development of the TMCC project. This table will be updated when either there is a status change or new risks are identified.

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**Table 3-1. Project Budget by Task**

Potential Risks	Impact	Mitigation Measures/Controls
<b>Project staff unavailable to work on project</b>	Project Delays	<ol style="list-style-type: none"> <li>1. The project team is extremely committed to the project.</li> <li>2. The project team has several individuals that could cover multiple areas.</li> <li>3. Monthly status updates will be reported against the baseline schedule.</li> <li>4. The Ride-On project manager (PM) will report on any changes to the staff assigned to the project.</li> </ol>
<b>Project staff experiences task delays</b>	Project Delays	<ol style="list-style-type: none"> <li>1. The project team is prepared to maintain bi-weekly project calls to ensure the project tasks are progressing according to plan.</li> <li>2. The project management team will meet monthly to discuss the project’s status.</li> <li>3. Monthly status updates will be reported against the baseline schedule.</li> <li>4. The Ride-On project manager will update the FTA project manager with any changes in schedule.</li> </ol>
<b>Project contractor experiences delays</b>	Project Delays	<ol style="list-style-type: none"> <li>1. The Ride-On project manager will monitor the contractor to ensure that project tasks and deliverables are maintained per schedule.</li> <li>2. The project management team will meet monthly to discuss the project’s status.</li> <li>3. Monthly status updates will be reported against the baseline schedule.</li> <li>4. The Ride-On project manager will update the FTA project manager with any changes in schedule.</li> </ol>
<b>Public input</b>	Change in project scope	<ol style="list-style-type: none"> <li>1. The Ride-On team values public and stakeholder involvement in the project.</li> <li>2. Two public forums will be held to educate the public on the project and proposed TMCC.</li> <li>3. The TMCCAC will meet to discuss the public input after each event to ensure the project’s scope, development, and schedule remain consistent.</li> <li>4. Project deliverable reports will be created to address public input in the development of the TMCC.</li> <li>5. The Ride-On project manager will update the FTA project manager with any changes in scope or schedule.</li> </ol>

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Potential Risks	Impact	Mitigation Measures/Controls
<b>Project Commencement Delay</b>	Project Scope	<ol style="list-style-type: none"> <li>1. The project team is extremely committed to the project and ready to get started.</li> <li>2. Communication with FTA and technical team in the preparation and development of this PMP.</li> <li>3. The FTA will provide the project team with comments on the draft PMP to strengthen the project.</li> <li>4. The FTA team will visit Ride-On and the project team on December 15<sup>th</sup> to discuss the project.</li> <li>5. Routine communication with FTA regarding the project.</li> <li>6. Monthly status updates will be reported against the baseline schedule.</li> </ol>
<b>Information Need</b>	Use of Subject Matter Experts	<ol style="list-style-type: none"> <li>1. The project management team will leverage all resources, internal and external, in the development of this project.</li> <li>2. The project management team will utilize the FTA and technical assistance team for resources.</li> <li>3. The project management team will leverage project Partner and advisory Partner expertise in the development of this project.</li> </ol>
<b>Stakeholder Buy-in</b>	Project Delays	<ol style="list-style-type: none"> <li>1. The project team will maintain bi-weekly core project management calls to ensure the project tasks are progressing according to plan.</li> <li>2. The project management team will meet monthly to discuss the project's status.</li> <li>3. The project management team will project communicate updates to all Partners on a regular basis by e-mail, telephone, in person meeting.</li> <li>4. The project management team will hold regular Partner meetings throughout the project per the project schedule.</li> <li>5. The project management team will provide copies of draft deliverables to all Partners for comment to ensure project agreement.</li> <li>6. Monthly status updates will be reported to FTA on the status of the project.</li> </ol>
<b>Technology Adoption</b>	Project Development	<ol style="list-style-type: none"> <li>1. The project management team will work both internally and externally throughout the life of the project to ensure agreement on all phases.</li> <li>2. Partners will discuss the proposed TMCC technologies and agree on its use.</li> <li>3. Applicable inter-agency agreements on institutional use will be developed to ensure adoption of the TMCC.</li> </ol>

## 4 PROJECT TRACKING AND REPORTING

### 4.1 Project Tracking

The Ride-On project manager will track the overall project schedule and task completion on a weekly and monthly basis (as illustrated in Table 1-4 of this Project Management Plan) to ensure the project remains on schedule for task and Deliverable completion. The Ride-On project manager will also meet with the project management team on a routine basis to ensure the project schedule is being met.

In addition, a detailed set of performance measures is scheduled to be developed as part of Task 3, Deliverable #2, during the development of the Concept of Operations. In development of the TMCC and its associated services, the TMCC's partners will identify both qualitative and quantitative measures to guide the project and evaluate the efficiency and effectiveness of the TMCC. Baseline data for each performance measure identified will be collected from appropriate Partners. The Ride-On project manager will track these measures throughout the project and include in the final report.

### 4.2 Project Reporting

The Ride-On project manager and project management team, including RTA, will provide the following reports to FTA that are required under the cooperative agreement.

- **Monthly Reports.** The monthly reports shall be addressed in TEAM/TrAMS and include the following items:
  - Total budget and remaining budget
  - Expenditures for the month in focus
  - Estimated % of work completed
  - Brief list of activities/deliverables completed that month
  - Brief list of activities anticipated in the next month
  - Variances from the current work plan, including planned corrective actions
  - Brief list of outstanding issues/comments requiring USDOT attention
  - Status of each deliverable, including the outline, the draft and the final version
- **Quarterly Reports.**
  - **Quarterly Progress Report (QPR).** The QPR shall be submitted to the FTA project manager via e-mail by the end of the month following the federal fiscal quarter, namely April 30, July 31, October 31, and January 31. The report shall include the significant accomplishments for the quarter; anticipated work for the following quarter; issues, if any, and recommended solutions; expenditures of the quarter and to date (cumulative) by task, and submittal status of deliverables (see also FTA Circular 6100.1E [IV.4.d]). These reports will be posted in TEAM/TrAMS by the FTA project manager.

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- **Milestone Progress Report.** The Ride-On project manager, in coordination with RTA, will provide a brief summary of the project's progress, including milestone status, for the quarter in TEAM/TrAMS as outlined in FTA Circular 6100.1E (IV.4.d). The report will be completed by the end of the month following the federal fiscal quarter.
- **Federal Financial Report.** The Ride-On project manager, in coordination with RTA, will submit a financial status report for the quarter in TEAM/TrAMS as outlined in FTA Circular 6100.1E (IV.4.c). The report will be completed by the end of the month following the federal fiscal quarter.

### 4.3 Document Review/Revision/Acceptance Process

The following process outlines the steps taken in which project deliverables will be reviewed:

1. Initial draft.
  - a. Project Management Team review and comment.
  - b. TMCCAC review and comment.
2. Revise draft (if required).
3. Submit Draft to FTA for review and comment.
4. Revised document – receive and address FTA comments.
5. Revised draft – finalize/acceptance. Provide to Project Management Team as information.
6. If additional revision is needed:
  - a. Revise document with proposed changes.
  - b. Share draft with Project Management Team.
  - c. Receive comments from Project Management Team.
  - d. Submit to FTA for comment.
  - e. Receive comments from FTA.
  - f. Revise draft for completion/acceptance.
7. Ongoing Document Updates.
  - a. The document will be closely monitored, tracked, and revised where appropriate throughout the life of the project.

**Appendix A: Document Version Changes**

<b>Version No.</b>	<b>Date</b>	<b>Description of Changes</b>	<b>Status</b>
01	11.30.2015	Draft Document	Submitted to FTA for review and comment.
02	01.08.2016	Revised Document	Comments received from FTA in December 2015. This version serves as a revised copy for FTA review and comment.
03	01.27.2016	Approved Final	Document approved by FTA.