

STAFF REPORT

SUBJECT: Regional Transportation Plan / Sustainable Communities Strategy (RTP/SCS) Scenario Development, Public Engagement and Technical Evaluation Consultant Selection

RECOMMENDED ACTION: Authorize the Executive Director to negotiate and enter into a professional service agreement with Cascadia Partners in an amount not to exceed \$247,880 (and negotiate with second-ranked firm, Mintier Harnish, if an agreement is not reached).

SUMMARY:

On June 29, 2020, SJCOG staff released a Request for Proposals (RFP) for qualified professional firms to provide public engagement, technical, and analytical services for this new, innovative approach to scenario development for the 2022 Regional Transportation Plan / Sustainable Communities Strategy (RTP/SCS). Of the three proposals received, a reviewing panel ranked Cascadia Partners as the top firm meeting the scoring criteria. If approved by the Board, Cascadia Partners will assist SJCOG staff in developing, evaluating the potential impacts of, and comparing performance metrics for, a set of policy and investment strategies to help the SJCOG region to achieve the goals of Envision 2050.

DISCUSSION:

The Regional Transportation Plan requires SJCOG to develop land use and transportation scenarios, based on stakeholder and public input, to guide transportation investments. An extensive public involvement program is also an important component for the RTP/SCS process. The approach to scenario planning in past RTPs presented a range of transportation investment scenarios from which stakeholders, the general public, and the SJCOG Board would choose its “preferred scenario.” For 2022, SJCOG will approach



scenario planning through a process designed to elicit high performing policies, projects, and programs that will enhance the transportation system under a range of inherently uncertain futures. This is accomplished by presenting a wide variety of policy and investment choices that will be tested in future “what if” scenarios. To assist staff in carrying out this new way of approaching the 2022 RTP/SCS development, an equally innovative consultant team is needed.

RECOMMENDATION:

The requested motions are to approve staff recommendations to:

- (1) Approve the consultant for the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) Scenario Development Public Engagement and Technical Evaluation
- (2) Authorize the Executive Director to negotiate and enter into a professional service agreement with Cascadia Partners in an amount not to exceed \$247,880. This action also includes an authorization for the Executive Director to negotiate with the second-ranked firm, Mintier Harnish, if a contract could not be executed with Cascadia Partners. The not-to-exceed total does not change.

FISCAL IMPACT:

This project is identified in the Fiscal Year 2020/2021 Overall Work Program (OWP). Funding for this contract will come from both SJCOG’s SB1 formula-based planning funds and other Federal, State, and local planning funding allocated to WE 601.01 Regional Transportation Plan.

BACKGROUND

As both the Metropolitan Planning Organization and the Regional Transportation Planning Agency for the region, SJCOG is responsible for developing and implementing the Regional Transportation Plan (RTP), a 20-year blueprint serving as a master plan for all regional air quality, highway, public transit, bicycle/pedestrian, and other transportation improvements. As SJCOG undertakes the development of the 2022 RTP/SCS, a major goal of the public outreach effort is to communicate with audiences to ensure that environmental justice issues are identified and that interested members of the public have ample opportunity to understand and provide meaningful input throughout the planning process. Community feedback will ultimately shape the Plan and act as a roadmap for future rounds of public outreach.

SJCOG staff, working through the RTP/SCS Advisory Committee, is developing the goals, objectives, and performance measures to guide the development of the 2022 RTP. At the beginning of 2020, staff coordinated outreach events across the County and developed web and print materials for distribution. Staff has been working to engage with the public during the Phase 1 outreach of the RTP with webinars, surveys, and social media regarding transportation priorities. SJCOG is currently in the Scenario Development phase and Phase 2 outreach will begin in January 2021 and end August 2021. A graphic illustrating the high-level schedule is shown below.

CHARRETTE #1 PILLARS AND FUTURES				CHARRETTE #2 METRICS	CHARRETTE #3 STRATEGIES
PILLAR	FUTURE 1	FUTURE 2	FUTURE 3	METRIC	STRATEGIES
HOUSING PRODUCTION	200,000 new residents by 2050	300,000 new residents by 2050	400,000 new residents by 2050	Average Home Price	Reduce parking requirements, increase funding for affordable housing
				Displacement Risk	Establish land bank authority, avoid "upzoning" vulnerable properties

On June 29, 2020, SJCOG staff released a Request for Proposals (RFP) for qualified professional firms to provide public engagement, technical, and analytical services for this new, innovative approach to scenario development for the 2022 Regional Transportation Plan / Sustainable Communities Strategy (RTP/SCS). The original deadline for proposals was August 6, 2020, however, staff extended the deadline to September 3 because only two proposals were received. A competitive process requires a minimum of three responsive proposals. As of the September 3, 2020 deadline, SJCOG had received proposals from three qualified firms. Those firms, their location, and their average score are listed in the following chart:

Primary Consultant Firm Name	Firm Location	Rank	Score
Cascadia Partners	Portland, Oregon*	1	92
Mintier Harnish	Sacramento, California**	2	82
Fregonese Associates	Portland, Oregon***	3	81.25
<p>* Cascadia Partners is located in Portland; subconsultant locations are Fehr & Peers (Walnut Creek, CA), 3rd City Coalition (Stockton, CA), Urban Design 4 Health (British Columbia), and Manhan Group (South Hampton, PA).</p> <p>** Both the primary consultant, Mintier-Harnish, and the sub-consultant, DKS, are located in Sacramento, CA.</p> <p>*** Fregonese is located in Portland; subconsultants HDR is located in Walnut Creek & HDR Calthorpe in Berkeley, CA</p>			

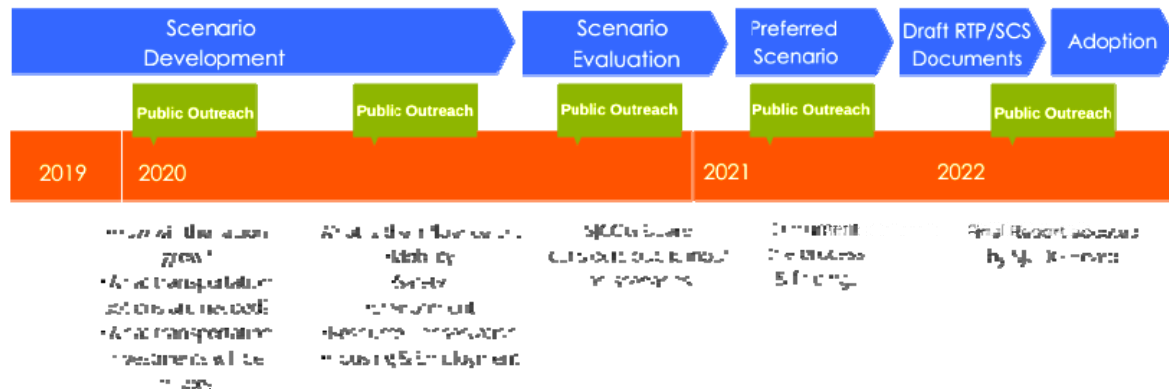
The proposals and qualifications of the three firms were reviewed by a selection committee comprised of three SJCOG staff members and Kim Anderson of Regional Government Services. The qualifications were reviewed and scored based on the following:

Proposal Scoring	Points
Initial Proposal Evaluation	
Comprehension of Project	20
Thoroughness of Proposal/Meeting the RFP Objectives	20
Overall Qualifications of Team <ul style="list-style-type: none"> Demonstrated integrated expertise in RTP/SCS development, metric development, innovative public engagement, meeting facilitation, and the RHNA process. Familiarity with San Joaquin Valley communities, a plus 	30
Specialized Technical Experience <ul style="list-style-type: none"> Specific expertise in the planning areas covered by SJCOG's SB1 implementation studies Specific experience developing specialized land-use, economic, and travel-demand model integration. 	30
Supplemental Evaluation (for firms that are shortlisted for consideration and/or interviewed)	
References	10
Oral Interview (if applicable)	15
Maximum Total Score Possible	125

Each member carefully reviewed the proposals and scored them accordingly. SJCOG and other reviewers concluded, based on the scoring criteria, that Cascadia is the best firm to meet the goals put forth in the scope of the RFP. While all firms had a clear understanding of SJCOG's change in approach to scenario planning, Cascadia offered the most robust and creative approach, as well as extensive relevant experience and local knowledge on the project topic and scope. The creative outreach process for the RTP/SCS demonstrated strong environmental justice consideration with the public outreach portion going beyond digital capabilities to reach disadvantaged communities. The Cascadia team includes Third City Coalition, a Stockton-based community engagement nonprofit, that will use targeted outreach to access populations that may experience barriers in digital literacy and access. Cascadia's proposal also had the most detail on public outreach and technical analysis, as well as strong visuals illustrating potential ways to integrate the technical work and present to the public.

Cascadia listed a detailed plan of action for each task and the draft report. Their primary approach to meet the RFP objectives is based on similar work applied to several studies in the region, including consultant team involvement with SJCOG's 2014 and 2018 RTP/SCS efforts. The Cascadia team has thorough experience working with SCS implementation in California and SB-2 funded projects dealing with housing production in the Sacramento region. Cascadia staff member Alex Steinberger served as the technical lead for SJCOG's 2014 RTP/SCS land-use allocation effort. Cascadia team members Fehr & Peers and UD4H have also led SB-1 funded studies for SJCOG and recently completed SB-1 implementation studies for the county. In addition, while all consultant teams came in at about the same budget, the Cascadia team included 120 hours of time from strategic partner Mike McKeever (former SACOG Executive Director) at no cost to SJCOG.

2022 RTP/SCS Timeline



NEXT STEPS:

Upon SJCOG Board approval, staff will meet with Cascadia Partners to refine the work plan and schedule. The preliminary schedule is identified below. Following Board action, the SJCOG Executive Director will negotiate a contract with Cascadia Partners. Should SJCOG be unable to successfully negotiate a contract with the top-rated Cascadia Partners, negotiations will commence with the second-highest scoring consultant, Mintier-Harnish. Project efforts will begin with the development of strategies, assumptions, and SCS pillars, and the duration of the contract is anticipated to last 18 months.

SCHEDULE

SCENARIO DEVELOPMENT PUBLIC ENGAGEMENT & TECHNICAL EVALUATION 2022 REGIONAL TRANSPORTATION PLAN		Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22
Task 0: Project Oversight																			
Task 3: Assumptions and Strategy Testing																			
Task 3.1: Baseline Metric Testing																			
Task 3.2: Strategy Comparisons and Metrics																			
Task 3.3: Integrated Futures of Key Assumptions and Measurable Strategies																			
Task 4: Public Outreach / Strategy Prioritization																			
Task 4.1: Stakeholder and Focus Groups																			
Task 4.2: General Public Outreach																			
Task 5: Develop Land-Use & Transportation Model Scenario Inputs																			
Task 5.1: Land-Use Allocation Modeling																			
Task 5.2: Integrate RHNA Objectives																			
Task 5.3: Scenario Evaluation Year Land-Use Forecasts																			
Task 5.4: Prioritized Policy, Program, and Project Lists																			
Task 5.5: Land-Use and Transportation Model Inputs for S.JCOG Travel Demand Model																			
Task 6.0: Final Plan Metric Development																			
Task 6.1: Review of Existing Plan & EIR Metrics																			
Task 6.2: Metric Testing																			
Major Project Milestones				Final Future Framework	Analytical Models Selected and Calibrated				Public Engagement Commences		Public Engagement Concludes			Draft Land Use Allocations Complete		TAZ Allocations Delivered to SJCOG			Review of Final EIR Metrics

Prepared by Ashley Goldlist, Assistant Regional Planner

4. DETAILED WORK PLAN

TASK 0: PROJECT OVERSIGHT

Task 0.1: Contract

If selected, Cascadia Partners (CP) will work with SJCOG staff to finalize and execute a contract for services. If any changes to the scope of work outlined below are needed, CP will revise as necessary.

Task 0.2: Project Team Kick-Off Meeting

Once under contract, CP will schedule a consultant/client (the Project Team) kick-off meeting to discuss the final scope and schedule of deliverables, resolve questions or concerns, and begin to identify stakeholders and technical experts to staff a Technical Advisory Committee (TAC).

Task 0.3: Final Scope and Schedule of Deliverables

Based on the feedback received in task 0.2, CP will submit a red-lined copy of the scope and schedule for SJCOG review.

Task 0.4: Future Project Team Meeting Schedule

Based on consultant and client calendars, CP will develop a schedule of regular Project Team meetings. Due to the potential for COVID-19 disruptions, CP recommends the use of video conferencing tools such as ZOOM to facilitate remote collaboration. With a national practice, we are well-versed in the efficient use of these tools and can advise SJCOG on remote collaboration best practices.

Task 0.5: Agendas, Meeting Notes

We understand the need for transparent planning processes and clear documentation. CP will provide agendas no less than 2 business days prior to each Project Team, TAC, and public meeting. In addition, CP will submit meeting notes within 2 business days of each of the aforementioned meetings.

Task 0 Deliverables

- Project Kick-Off Meeting
- Final Scope of Work and Project Schedule
- Future Project Team Meeting Schedule
- Agendas and Meeting Notes

TASK 1: SCS PILLARS, ASSUMPTIONS, & STRATEGIES

Task 1.1: Develop Action Plan

The Action Plan for the RTP/SCS process will involve two components: an Engagement Strategy and the SCS Futures Framework. This effort will be critical to setting the parameters of the project including the scenarios process and how it is presented to the public, policymakers, and elected leaders.

ENGAGEMENT STRATEGY

Cascadia Partners and Third City Coalition will work with SJCOG staff to develop a comprehensive Engagement Strategy that covers expert panel, stakeholder, and general public engagement. A key component of this strategy will be the recruitment of project stakeholders and subject-matter experts to staff the TAC. Third City Coalition will develop a stakeholder database to categorize and track the level of involvement for all potential stakeholders involved in the scenarios process. The Engagement Strategy will also include a work plan of all engagement activities including meetings with the TAC, specific stakeholder groups, and the general public. The Engagement Strategy will also define staff and consultant roles, outreach and communications plan, and materials required for each activity.



Above: Third City Coalition facilitates a stakeholder meeting in Stockton, CA

SCS FUTURES FRAMEWORK

The SCS Futures Framework will utilize “exploratory” scenario planning techniques to identify factors outside of SJCOG’s direct control that policies will need to address. These exogenous variables need to be identified in order to confirm the set of “SCS Pillars” that will guide the scenarios process. Once the Pillars are defined, further exploration will need to take place to define the metrics that will be measured and the strategies that are likely to have an impact on those metrics.

Information gathered during this process will provide clear guidance for the more analytical “normative” scenarios process that will take place in tasks 3 and 5. While listed in task 3 in the RFP, we feel that developing the Futures Framework in task 1 alongside pillars and future challenges and impacts will provide more comprehensive guidance for subsequent tasks.

To develop the framework, our team of transportation, land use, and regional planning policy experts will work collaboratively with the Project Team and the TAC in three (3) half-day charrettes. Each charrette will be focused on defining a key component of the Futures Framework. The charrettes will be conducted remotely using collaboration tools ZOOM and MURAL. Using these tools, we will walk participants through collaborative exercises to reach consensus.

Charrette #1: Pillars and Futures

During the first charrette, we will put exploratory scenario planning techniques into practice through a collaborative exercise that will prioritize the range of potential themes (SCS pillars) that could impact the San Joaquin region in the future. In addition to pillars, this exercise will help the TAC and Project Team think through the range of future conditions outside of SJCOG’s control, often called exogenous variables.

Cascadia Partners has experience facilitating such exercises with clients around the country in both in-person and web-based formats. The result of this exercise will be a confirmed set of up to six (6) foundational “pillars” and associated challenges and impacts for up to three (3) “futures.”

The pillars and future impacts and challenges will provide the starting point for developing associated metrics in charrette #2 and strategies in charrette #3. Fehr & Peers will support Cascadia in developing scenarios that reflect exogenous variables likely to affect travel behavior in the San Joaquin Valley, including changes to transportation infrastructure, new transportation technologies, and increasing telework arrangements.

CHARRETTE #1 PILLARS AND FUTURES				CHARRETTE #2 METRICS		CHARRETTE #3 STRATEGIES	
PILLAR	FUTURE 1	FUTURE 2	FUTURE 3	METRIC		STRATEGIES	
HOUSING PRODUCTION	200,000 new residents by 2050	300,000 new residents by 2050	400,000 new residents by 2050	Average Home Price		Reduce parking requirements, increase funding for affordable housing	
				Displacement Risk		Establish land bank authority, avoid "upzoning" vulnerable properties	

Above: A conceptual example of the framework tied to each charrette. As pillars, metrics, and strategies have yet to be finalized, the matrix has been populated with generic information to illustrate the type of information each charrette will cover.

Charrette #2: Metrics

During the second charrette, we will review the finalized pillars and future challenges / impacts. We will then engage the TAC and Project Team in a brainstorming and prioritization exercise to develop up to two (2) potential metrics for each pillar. The goal of developing metrics will be to establish measurable indicators which could respond to policies and strategies that SJCOG could implement in the future.

We will mine our team's subject-matter experts in economics, transportation, land use, and public health to identify emerging research and best practices. Fehr & Peers will bring their expertise on performance measurement to refine transportation-related performance metrics. Similarly, Urban Design 4 Health will connect their recent work in San Joaquin County to help identify metrics that track key health outcomes.

Charrette #3: Strategies

In the final charrette, we will develop a menu of up to 30 potential strategies that could be used to address the challenges identified within each "pillar." We will again mine the combined expertise of the consultant team and TAC members to develop a range of potential strategies or policies to be prioritized in later stages of the project.

Fehr & Peers will draw on their expertise in community-level VMT and GHG reduction and innovative system performance management to identify strategies that will advance the RTP/SCS environmental goals while accommodating the region's anticipated growth in housing and jobs.

In addition to developing a "menu" of strategies, we will group like strategies based on their ability to impact certain metrics. This will be a key element of the communication materials used during the public engagement phase of the project.

CHARRETTE #1 PILLARS AND FUTURES				CHARRETTE #2 METRICS		CHARRETTE #3 STRATEGIES	
PILLAR	FUTURE 1	FUTURE 2	FUTURE 3	METRIC		STRATEGY ASSIGNMENT	MENU OF STRATEGIES
P1	P1-F1	P1-F2	P1-F3	M1-A		S1, S3, S5	S1: STRATEGY 1
				M1-B		S7, S5, S11	S2: STRATEGY 2
P2	P2-F1	P2-F2	P2-F3	M2-A		S8,S2	S3: STRATEGY 3
				M2-B		S2,S3	S4: STRATEGY 4
P3	P3-F1	P3-F2	P3-F3	M3-A		S1, S3, S5	S5: STRATEGY 5
				M3-B		S6	S6: STRATEGY 6
P4	P4-F1	P4-F2	P4-F3	M4-A		S10, S2, S3	S7 STRATEGY 7
				M4-B		S4,S7	S8: STRATEGY 8
P5	P5-F1	P5-F2	P5-F3	M5-A		S12	S9: STRATEGY 9
				M5-B		S7, S4	S10: STRATEGY 10
P6	P6-F1	P6-F2	P6-F3	M6-A		S8, S9	S11: STRATEGY 11
				M6-B		S1, S3	S12: STRATEGY 12

Above: Preliminary SCS Futures Framework, tied to the three charrettes. In charrette #1, we will define pillars and how they are impacted by three disparate futures. In charrette #2 we will indentify metrics to evalute each pillar. Finally, in charrette #3 we will develop a menu of strategies and assign them to associated metrics.

Task 1.2: Analysis and Summary of Results

The Cascadia Partners team will synthesize input received during the charrettes to finalize the SCS Futures Framework for the RTP/SCS. The finalized Futures Framework will include a clear and concise narrative description of each pillar, associated future impacts and challenges, related metrics, and relevant strategies. In addition to the framework itself, Cascadia Partners will clearly document the input received from the Project Team and TAC for inclusion in the final Action Plan.

Task 1.3: Draft Action Plan

Cascadia Partners will work closely with SJCOG staff to develop a concise technical memorandum that summarizes TAC and Project Team outreach and provides clear direction for the technical and public outreach components of the project. Our team will provide up to two rounds of revisions, circulating the draft among the Project Team and the TAC. In addition to including the final Futures Framework and Engagement Strategy, the Action Plan will provide clear guidance on recommended modeling and measurement techniques for developing point scores for each strategy.

Task 1.4: Final Action Plan

Following up to two rounds of review, Cascadia Partners will produce a final Action Plan document which will be posted on the RTP/SCS website by SJCOG staff.

Task 1 Deliverables

- Draft and final Action Plan
- Engagement Strategy
- Draft and Final SCS Futures Framework
- Three (3) charrettes with the Project Team and TAC

TASK 2: DEVELOP TOOLS & MODELS

Task 2.1: Define Tools and Models

We understand that SJCOG has familiarity with and access to certain tools and models, such as Envision Tomorrow, REMI, and MetroQuest. Our team is well-versed in these tools, but will also provide SJCOG staff and the TAC with an opportunity to learn about and weigh in on other potential normative scenario planning tools, predictive models, and engagement tools that could be deployed in service of the RTP/SCS. Our approach will focus on four classes of tools: land use allocation tools, predictive or policy-based models, meta-analyses, and digital engagement tools.

TOOLS AND MODELS BACKGROUND RESEARCH

Based on the metrics and strategies finalized in task 1, our team will research and summarize a range of potential land use allocation tools, predictive models, and applicable academic research. We will compile this research into a concise presentation and decision matrix that provides costs, features, and other considerations. As summarized below, our team will research up to three (3) land use allocation tools, ten (10) predictive or policy-based models, and ten (10) academic studies.

	LAND USE ALLOCATION TOOLS	PREDICTIVE OR POLICY-BASED MODELS	META- ANALYSIS
Example	Envision Tomorrow, UrbanFootprint	SWMM (EPA), CalEEmod, IMPLAN	Quantifying Greenhouse Gas Mitigation Measures (CAPCOA)
Research	3	10	10
Calibrate / Run / Apply	1	3	10

TOOL AND MODEL SELECTION CHARRETTE

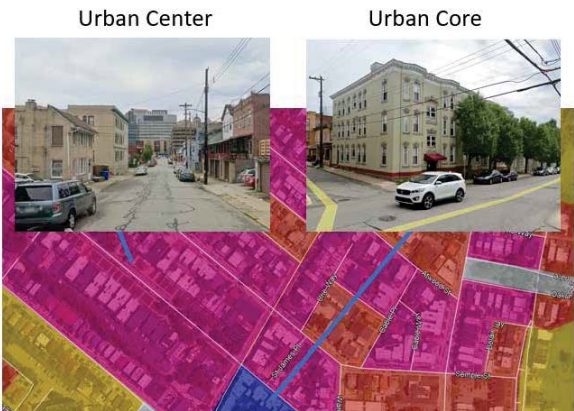
As tool-agnostic practitioners of scenario planning, we have experience working through tool selection processes in a collaborative manner with clients across the country. We will bring this experience to a half-day charrette, where we will work with the TAC and Project Team to weigh pros and cons of various land use allocation tools, predictive or policy-based models, academic studies, and digital engagement tools. Out of this exercise, we will select, calibrate, and deploy up to one (1) land use allocation tool, up to three (3) predictive or policy-based models, up to ten (10) academic studies, and up to one (1) digital engagement tool.

Task 2.2: Model Testing and Validation/Calibration

The Cascadia Partners team will work closely with the Project Team to calibrate the land use allocation tool and up to three (3) additional predictive or policy-based models selected in task 2.1. For land use allocation tools, we will leverage past placetype and building prototype assumptions from SJCOG’s Envision Tomorrow model while updating economic assumptions to reflect current and projected future conditions. As former developers of Envision Tomorrow and UrbanFootprint, our staff are experts in translating assumptions between tools and ensuring models are validated to reflect the most current data. For any additional models, we will work with SJCOG to ensure that those selected are either free and open source or feasible for SJCOG to utilize on an on-going basis. Fehr & Peers will bring their expertise in quantifying transportation demand management and community based GHG emission reduction strategies to inform the calibration of off-the-shelf models.

Task 2 Deliverables

- Tool and Model Decision Matrix
- Tool Selection Charrette
- Calibrated Land Use Allocation Tool (1)
- Calibration of Additional Models (3)



Above: Placetype Calibration for the City of Pittsburgh, PA

TASK 3.0: ASSUMPTIONS AND STRATEGY TESTING

Task 3.1: Baseline Metric Testing

Using the Futures Framework developed in task 1, the Cascadia Partners team will begin the process of testing the “menu” of strategies grouped to metrics. The first step in this process will be establishing a baseline for each metric under each potential future. For instance, in order to establish the potential benefit of increased affordable housing funding (strategy) on the cost of housing (metric) across a range of potential growth projections (futures), we first need to estimate the cost of housing (metric) in each future if no action is taken. The conceptual framework of this analysis is shown below.

SCS PILLAR: HOUSING PRODUCTION	FUTURE 1	FUTURE 2	FUTURE 3
	200,000 new residents by 2050	300,000 new residents by 2050	400,000 new residents by 2050
Business as Usual (BAU)	"Average Home Price (BAU, F1)"	"Average Home Price (BAU, F2)"	"Average Home Price (BAU, F3)"
Increased Funding for Affordable Housing (S1)	"Average Home Price (S1, F1)"	"Average Home Price (S1, F2)"	"Average Home Price (S1, F3)"

Task 3.2: Strategy Comparisons and Metrics

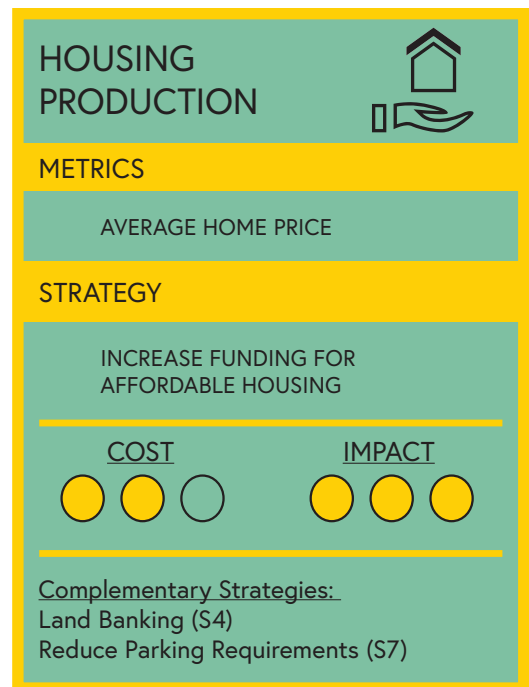
Building upon the Futures Framework and baseline testing completed in task 3.1, the consultant team will use the models and meta-analyses identified in task 2 to “score” each strategy based on its ability to positively impact each metric. In addition to providing scoring based on the efficacy of each strategy to achieve SJCOG’s goals, high level cost assumptions will be made to provide the public and policy-makers with a sense of the size of investment needed to implement each strategy. Finally, we anticipate that strategies that work well on their own will likely have additional impacts if combined with others. We will mine our team’s collective experience to identify for each individual strategy, related or complementary strategies that could amplify its impact. We will also consider the potential of strategies to have reduced individual effectiveness if they target the same user base and same behavior (e.g. commute-focused strategies that encourage both telecommuting and transit use) and will incorporate this effect into the evaluation of each strategy.

Task 3.3: Integrated Futures of Key Assumptions and Measurable Strategies

We will organize the results of the analyses completed in task 3.2 into a spreadsheet database for tracking and summary purposes. A concise technical memorandum will accompany this database to document the models and techniques used to assign point values. While technical documentation will be an important component of the final deliverables for task 3, we also recognize that robust technical analyses are only useful if they can be understood by a broad audience. Cascadia Partners will develop clear and engaging summary materials to communicate the “menu” of strategies and their impact on potential futures to the general public, practitioners, and elected officials.

Task 3 Deliverables

- Baseline Metrics
- Final Strategies with Point Values Assigned
- Communications Package: Descriptive Futures, Metrics, and Strategies



Above: Conceptual “Score Card” for public outreach strategy vetting.

TASK 4: PUBLIC OUTREACH / STRATEGY PRIORITIZATION

Task 4.1: Stakeholder and Focus Groups

We recommend gathering general public outreach feedback (Task 4.2) before conducting focus groups. This minor reconfiguration of tasks will allow focus group stakeholders to:

1. Filter their prioritization decisions based on their own expertise and the priorities of the broader public to ensure they are in alignment before moving forward to Task 5
2. Provide input on distilling general public feedback into three plausible strategy packages described in Task 5; and
3. Help shape the types of programs and policies that could implement the strategies identified under Task 1.

Cascadia Partners will work with the Project Team to identify key stakeholders to participate in up to five (5) in-person or virtual focus groups. We will also provide an outreach strategy that brings the right level of expertise and stakeholders to the table while soliciting diverse perspectives from across the region.

We will design materials and facilitate activities for each focus group. The structure of each activity will be determined once pillars and strategies are selected. At a minimum they will involve detailed discussions of the viability of strategies being prioritized by the general public in task 4.2.

Feedback from all focus groups will be summarized in a concise, public-friendly slide presentation that can be distributed through email, website, and social media channels. The presentation will summarize the prioritization process of both the general public outreach and focus groups and present the ranking results of the strategies within each potential future and as a whole.

Task 4.2: General Public Outreach

Per our recommendation in Task 4.1, Cascadia Partners will launch into the general public outreach strategy once potential futures and strategies have been identified in Task 3. Cascadia Partners has experience using MetroQuest in scenario planning,

and find it to be an excellent tool for prioritization, ranking, and budgeting associated with potential policies or strategies.

We will create a two stage exercise on Metroquest and use their built-in prioritizing and participatory budgeting features to rank the “menu” of strategies that participants can carry forward into budgeting.



Above: Cascadia Partners staff have experience building MetroQuest projects for scenario planning projects in both city and regional planning contexts. Since this project involves the vetting of strategies and policies with the public, we recommend the use of MetroQuest's prioritization, ranking, and participatory budgeting tools. Image source: MetroQuest

ONLINE ENGAGEMENT TOOLS

Cascadia Partners is well-versed in the use of online engagement tools to broaden access to planning processes beyond the "usual suspects."

ZOOM

Large 100+ person workshops can also be hosted and organized virtually via Zoom with language interpreters on separate lines to follow along without disruption. Charrettes and workshop exercises can be performed virtually with the breakout room feature on Zoom in which participants break out into small group discussion within the same meeting with a facilitator assigned in each room to screenshare and record feedback.

MURAL

MURAL is a web-based tool that facilitates small group collaboration and feedback. Using this service, Cascadia Partners proposes to host virtual meetings that allow participants to review documents, evaluate concepts, and provide feedback in real-time.

TARGETED OUTREACH

In our experience, virtual tools such as MetroQuest can be a barrier for those with limited digital access and digital literacy creating inequities in engaging underrepresented populations.

We propose replicating the virtual tools into analog, hands-on exercises that can be used in targeted areas. Targeted outreach could include tabling at

farmers markets, community/cultural events and other local venues where more vulnerable and hard-to-reach communities can participate while taking necessary safety precautions during the pandemic.

Third City Coalition will act as a locally-based partner on the consultant team to help design and strategize outreach efforts focused on reaching underrepresented populations such as communities of color, low-income communities, and immigrant and refugee populations. Third City has established relationships with other community-based organizations in the region who can potentially support broader outreach campaigns throughout

the region. The Cascadia Partners team will rely on SJCOG to translate all materials into Spanish and other commonly spoken languages in the region as needed.

Cascadia Partners will develop a visually compelling summary of results from MetroQuest and hands-on exercises to present at the focus groups in Task 4.1.

Task 4 Deliverables

- Five (5) focus groups
- Materials and facilitation for each focus group
- Spanish translation for all materials
- Calibrated MetroQuest online workshop
- Public engagement summary memorandum

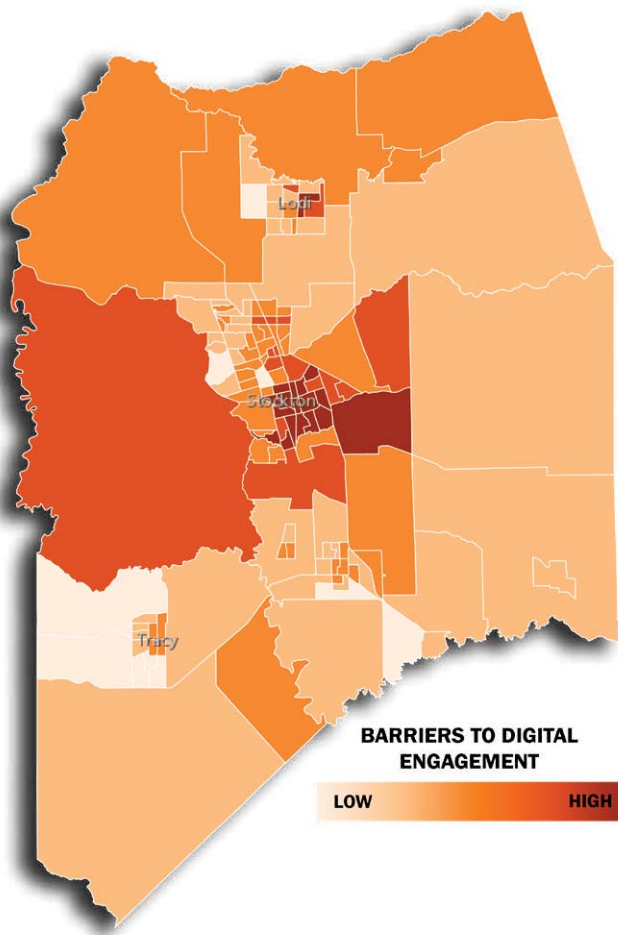
TASK 5: DEVELOP LAND-USE & TRANSPORTATION MODEL SCENARIO INPUTS

Task 5.1: Land-Use Allocation Modeling

Using the input received during task 4 outreach, the Cascadia Partners team will deploy the calibrated land use allocation tool selected in task 2 (UrbanFootprint or Envision Tomorrow). As described in task 2, our team includes former developers of both tools and we are well-versed in translating assumptions between tools.

We will use the selected tool to create up to three (3) land use allocations to various horizon years. We anticipate that the strategies prioritized in task 4 will not point to a single path forward, but rather multiple potential approaches will emerge. That is why we recommend a trend or “business as usual” scenario that continues past trends and strategies, as well as two alternatives that synthesize input received in task 4.

Our team is experienced in developing clear and replicable allocation criteria to drive normative scenario planning tool allocation. This will include reconciling strategies identified in task 4 with general and specific plans for each community within the County. Our experience working on Sustainable Communities Strategies throughout California, has taught us the importance of clear



Above: Cascadia Partners understands the pitfalls of digital engagement during the COVID-19 pandemic. We were recently awarded a grant by the Lincoln Institute of Land Policy to study barriers to digital engagement. As part of that work, we developed an index (shown above) that will help us identify key locations within the County where a more nuanced approach will be required to close the engagement gap.



THE "TOOL-AGNOSTIC" APPROACH

The Cascadia Partners team is in a unique position to provide unbiased land use allocation and analytical model selection assistance to SJCOG. Our team includes practitioners who have experience calibrating, and in some cases developing, some of the leading off-the-shelf scenario tools available. With in-depth knowledge of UrbanFootprint, Envision Tomorrow, and a host of other software packages, we have the unique ability to help SJCOG find the scenario software solution that best fits your needs.

documentation and detailed, jurisdiction-specific modeling. That is why we are committed to working closely with SJCOG technical staff to ensure we are meeting projected population and employment totals by Census Designated Place (CDP) and Sphere of Influence (SOI).

Task 5.2: Integrate RHNA Objectives

In task 5.2, Cascadia Partners will work with SJCOG to evaluate scenarios based on their ability to accommodate San Joaquin County's RHNA allocations within the designated Cycle 6 time-frame (2021 - 2029). Strategic partners Mike McKeever and Robert Liberty have deep experience working within the RHNA policy framework and will provide policy guidance.

In addition to evaluating each land use allocation's ability to accommodate RHNA objectives, Cascadia Partners will evaluate Cycle 5 RHNA allocations relative to both 2018 population and employment allocations and proposed 2022 population and employment allocations. The purpose of this task will be to ascertain whether ample capacity exists to accommodate housing at various price points

within each proposed allocation scenario while also tracking the region's progress toward RHNA goals from Cycle 5 to Cycle 6.

Primary metrics considered will match with typical RHNA measures including Jobs-Household Relationship (Factor 1), Sustainable Housing / RHNA SCS Housing Average (Factor 2), and Family Income Characteristics (Factor 3). Assumptions and results of this analysis will be summarized in a concise technical memorandum. Cascadia Partners will finalize this memorandum after two (2) rounds of review with the Project Team.

Task 5.3: Evaluation Year Forecasts

Based on our deep experience with normative land use allocation tools such as Envision Tomorrow and UrbanFootprint, we understand that one of the primary weaknesses of these tools is their lack of temporal awareness. Both tools require additional assumptions and post processing to segment allocations by multiple horizon years. Through our work with MPOs around the country, we have developed a proven approach to reporting land use allocation results at multiple horizon years.

Working with SJCOG, our team will produce iterations of each of the three land use allocations for up to four (4) horizon years: 2016, 2020, 2035, and 2050. For each horizon year, Cascadia Partners will perform a detailed CDP-based allocation review with SJCOG staff. This review will allow for one round of revisions. For any additional air quality conformity years or other horizon years, Cascadia will provide SJCOG with a “straight-line” method for scaling growth up or down based on the closest calibrated horizon year.

Task 5.4: Prioritized Policy, Program, and Project Lists

Specific programs and policies associated with strategies will have largely been defined by the stakeholder and focus group meetings conducted in task 4.1. Working with the Project Team and SJCOG Travel Demand Modeling Consultant, Cascadia Partners will summarize each of the three (3) land use allocations based on the package of strategies and associated programs and policies that define them. Descriptions of each scenario along with maps, GIS data, and detailed summaries of strategies, policies, and programs will be delivered in a well-organized data hand-off package.

In addition, Cascadia Partners will condense and package all previous technical documentation into a Scenario Development Report. This report will encompass all public engagement related to the project including the development of the Futures Framework. It will summarize allocation criteria and scenario assumptions as well as report key performance indicators. It is anticipated that this report will be appropriate for inclusion as an appendix in the adopted 2022 RTP/SCS.

Task 5.5: Land-Use and Transportation Model Inputs for SJCOG Travel Demand Model

Cascadia Partners understands that SJCOG maintains a travel demand model that requires specifically formatted inputs at the Traffic Analysis Zone (TAZ) scale. Our team of scenario planning and modeling experts have experience translating Envision Tomorrow and UrbanFootprint housing, population, and employment totals into the exact specifications and geographic units required by travel demand models. We will work closely with

the SJCOG Travel Demand Modeling consultant to ensure that these requirements are met and will provide them with a clean and clearly documented TAZ database for each scenario allocation.

Task 5 Deliverables

- Land-use Allocation Criteria and Documentation
- Cycle 5 & 6 RHNA Technical Memorandum
- Scenario Evaluation for Four (4) Horizon Years
- Prioritized Policy, Program, and Project Lists
- Scenario Development Report
- TAZ Allocations for SJCOG Travel Demand Model

TASK 6.0: FINAL PLAN METRIC DEVELOPMENT

Task 6.1: Review of Existing Plan & EIR Metrics

In order to maintain consistency with past planning efforts, Cascadia Partners will review the adopted 2018 RTP/SCS with a focus on the “Methodology” and “Analysis Results” appendices. In addition, our team will review the associated Environmental Impact Report (EIR) to identify appropriate EIR metrics to carry forward into the current RTP/SCS cycle. Cascadia Partners will ensure that selected metrics can be produced for the entire region, as well as key sub areas such as CDPs and Communities of Concern (Environmental Justice focus areas) .

Task 6.2: Metric Testing

The Cascadia Partners team includes national experts in a wide range of modeling disciplines including land use, economics, and transportation. Our team of experts will work with SJCOG to review metric assumptions for the RTP/SCS and associated EIR to ensure applicability with SJCOG’s enhanced travel demand model and SCS requirements. If technical hurdles are encountered during the metric testing process, our team will work with SJCOG to suggest revisions to the modeling process.

Task 6 Deliverables

- EIR review / up to two (2) meetings
- Review of proposed EIR metrics / up to two (2) meetings