

Exhibit A
Apex Circulator Study
Scope of Services

Project Team

- Kelly Blazey, Town of Cary
- Kevin Wyrauch, Town of Cary
- Shannon Cox, Town of Apex
- Jenna Shouse, Town of Apex
- Will Brown, Town of Apex

Project Description

The Town of Apex has contracted with Town of Cary to complete the planning process for the Town’s priority circulator, as recommended in the Western Wake Comprehensive Operations Analysis and the Town of Apex’s long range transportation plan, *Advance Apex: The 2045 Plan*. The proposed Apex Circulator is intended to provide bus service to the areas with the highest propensity to use transit in Apex, including the Beaver Creek Commons and Beaver Creek Crossings shopping centers, WakeMed Apex, Broadstone Station (Walmart), multi-family residences, Rex Rehabilitation and Nursing Care Center, and Cambridge Village of Apex, a senior living center. The proposed route alignment includes Beaver Creek Commons Drive, NC 55, Apex Peakway, Tingen Road, and James Street. The Apex Circulator is anticipated to provide 60-minute all-day service Monday-Saturday from 6:00am – 10:00pm and 60-minute all day service on Sunday from 7:00am – 9:00pm, as recommended in the Western Wake Comprehensive Operations Analysis. While the Western Wake Comprehensive Operations Analysis and Advance Apex have established the framework for this priority circulator, technical assistance is needed to: refine an operating plan, specifically identify capital funding needs, complete targeted outreach to the potential area of service, quantify capital and operating costs, develop a potential municipal agreement for service between the Town of Apex and Town of Cary, and prepare a Community Funding Area application for capital and operating expenses.

As a result of this technical assistance project, the Town of Apex will establish all relevant details necessary to implement the Apex Circulator and position the Town of Apex to apply for capital and operating funds through the Community Funding Area Program.

Each task will require coordination and involvement of both Town of Apex and Town of Cary staff; however, primary roles are identified throughout this scope. The Town of Apex will have final decision-making authority for every task and deliverable described below or that may arise during the course of this Agreement, even if such task or deliverable is described as being “developed,” “determined,” or the like, by the project team.

Project Schedule

Total Duration: 7 Months

Project Start: May 2019

Project Completion: December 2019

Task	Due Date
Project Administration	
Kick off – CAMPO	July 22
Kick off – Town of Cary	July 24
Status Call – CAMPO	September 16
Town of Cary invoice	October 7
Quarterly report	October 31
Town of Cary invoice	January 6
Quarterly report	January 31
Task 1 – Public Outreach	
Public Engagement Plan	May 27
Outreach event materials and online survey	June 10
Transit Committee Meeting #1 – project overview	July 10
Complete pop-up events	July 20
Close survey	August 2
Draft public input summary	July 24
Updated public input summary	August 9
Town Council Update #1 – project overview and public input summary	August 20
Transit Committee Meeting #2 – project recommendations	October 2
Town Council Update #2 – project recommendations	October 15
Transit Committee Meeting #3 – CFA application	December
Task 2 – Capital and Operations Plan	
Task 2.1 – Turn-by-turn Plan	August 16
Task 2.2 – Bus Stop Needs	August 16
<i>Transit Committee review of Task 2.1 and 2.2 deliverables</i>	<i>August 19-23</i>
Task 2.3 – Vehicle Information	September 6
Task 2.4 – Paratransit	September 6
Task 2.5 – Fare Structure	September 6
<i>Transit Committee review of Tasks 2.3-2.5 recommendations</i>	<i>September 9-13</i>
Task 3 – Marketing, Branding, and Customer Service Plan	
Task 3.1 – Branding	September 23
Task 3.2 – GPS Tracking and Mobile Applications	September 23
Task 3.3 – Marketing plan	September 23
Task 3.4 – Customer Service memo	September 23
Task 4 – Financial Plan	
Financial Plan	September 30
Task 5 – Community Funding Area Program Capital and Operations Application and Draft Agreement	
Capital and Operations funding application	December
Plan for future public engagement	December
Draft Capital and Operations Agreement	December

Project Administration

Project Management

The technical assistance project will be managed by Shannon Cox. Kevin Wyrach and Jenna Shouse will substantially carry out each task. Will Brown will provide support for all mapping. Kelly Blazey will provide oversight and project management for the Town of Cary.

Team Meetings

The Town of Apex proposes bi-weekly conference calls with the project team to discuss study activities, report on progress, and plan future activities. In addition to these informal meetings, in-person meetings will be scheduled as needed. Kevin Wyrach and Jenna Shouse will conduct site visits along the proposed route during Task 2.

Quarterly Reporting

The Town of Apex will provide quarterly reporting to CAMPO and GoTriangle per the “Special Operating Funding Agreement Community Funding Area Program – Planning, Wake Transit FY 2019.” The Town of Cary will provide brief summary information to the Town of Apex regarding work performed by Town of Cary staff and any issues confronted to be incorporated in quarterly reports. The frequency of reporting will be determined at project kick-off.

Task 1 – Public Outreach

Town of Apex staff will develop a draft Public Engagement Plan for Town of Cary staff to review. The Public Engagement Plan will be shared with the Wake Transit Public Engagement and Communications Subcommittee for review. Town of Apex staff and the Apex Transit Advisory Committee will hold targeted outreach events along the proposed Apex Circulator. Town of Apex staff will release an online public survey to gather input from the community on the proposed Apex Circulator. An in-person Spanish translator will staff the outreach events in areas with populations with limited English proficiency. Town of Apex staff will coordinate with the Apex Transit Advisory Committee throughout the planning process. Two updates will be presented to the Town of Apex Town Council.

Deliverables:

- Public Engagement Plan
- Materials for public outreach events as outlined in the Public Engagement Plan
- Summary of each public outreach event
- Summary of online survey results
- Town Council presentations (2)
- Town of Apex Transit Committee meeting facilitation

Primary Roles:

- Town of Apex will be responsible for all public outreach throughout the study.
- Town of Cary will review the public engagement plan, assist with preparation of materials for and be present to assist with question at one Town Council presentation and one Town of Apex Transit Committee meeting.

Task 2 – Capital and Operations Plan

2.1 Turn-by-turn plan

The project team will review input gathered throughout the public engagement process and develop a turn-by-turn plan that meets the community's needs. Elements of this plan include: route alignment, schedule, stop locations, layover/recovery stop location, and a route for the start and end of each day of service.

2.1.1 Route Alignment

The project team will determine if the proposed route alignment in the Town's long range transportation plan, *Advance Apex: The 2045 Plan*, needs to be adjusted based on the input received throughout the public engagement process from public outreach event attendees, online survey respondents, and the Apex Transit Advisory Committee. Site visits will be conducted to ensure that the recommended route alignment is feasible within the recommended bus schedule.

2.1.2 Stop Locations and Schedule

The project team will review public input on bus stop locations and incorporate these suggestions into the recommended bus stop locations. Bus stop spacing will need to meet requirements based on guidance from Town of Cary staff. The project team will consider comments that GoTriangle submitted to NCDOT as part of U-2901B NC 55 Widening regarding bus stop and bus bay locations to serve GoTriangle Routes 305 and 311.

The project team will review public input on the bus schedule to determine service days, hours, and frequency. The project team will consider the recommended schedule in the Western Wake Comprehensive Operations Analysis. Members of the project team will conduct site visits along the recommended route to measure the total travel time and determine bus stop arrival and departure times. Total travel time will for account traffic delays, passenger stops, and a driver layover/recovery stop.

The following steps will be taken to schedule timely transfers between the Apex Circulator and regional transit services:

- Coordinate with GoTriangle on the details regarding the planned reduction in frequency of Route 311 (Apex to Regional Transit Center). In FY 20, GoTriangle will reduce the frequency of Route 311 to a total of 8 trips per day. The proposed changes include 3 northbound trips and 1 southbound trip during the AM Peak and 3 southbound trips and 1 northbound trip in the PM Peak.
- Coordinate with GoTriangle on the details regarding the planned service expansion and increase in frequency of Route 305 (Apex to Raleigh). In FY 21, GoTriangle will expand the frequency of Route 305 to all-day service with 30-minute service during the peak, hourly service during the midday, extended service in the evening, and all day hourly service on weekends. Route 305 will extend southwest into downtown Apex at an enhanced transfer center.
- Design the Apex Circulator schedule to allow for transfers to Route HSX Holly Springs-Apex-Cary Express service. In January 2020, GoCary is anticipated to begin service of Route HSX.

Bus stop location and bus schedule recommendations will be developed based on a review of public input and relevant plans, coordination with regional transit agencies, and field tests of multiple alternatives. The Apex Circulator schedule will be timed to align with regional transit services to ensure reliable access to regional destinations.

Deliverables:

- Map of route alignment including routes for the start and end of each day of service
- Bus stop locations
- Layover/recovery stop location
- Bus schedule with bus arrival/departure times, regular hours of operation, holiday hours of operation, and timed transfers to regional routes

Primary Roles:

- Town of Apex
 - Prepare summary information from public input regarding route alignment, schedule, and stop locations
 - Prepare all route and stop mapping
 - Participate in field visits
 - Provide direction for route, stop, and schedule recommendations
- Town of Cary
 - Review summary information from public input
 - Provide recommendations and guidance regarding route alignment
 - Provide recommendations and guidance regarding stop locations
 - Provide recommendations and guidance regarding schedule
 - Lead coordination with GoTriangle and HSX routes

2.2 Bus Stop Needs

The project team will review the Apex Bus Stop Inventory to determine existing conditions at bus stops along the recommended route alignment. The project team will review public input on priority transit amenities and compare these priorities with existing conditions. Bus stop improvements will be prioritized at the enhanced transfer center, bus stops with high ridership projections, and bus stops in areas with a sizeable population of seniors and persons with disabilities. Land use and demographic characteristics will also be taken into consideration. Recommendations will include design specifications for bus stops with proposed amenities and associated cost estimates. The project team will determine if any right-of-way will need to be acquired at recommended bus stops.

The Wake Transit Bus Plan includes funding for an enhanced transfer center in Apex in FY 21. The proposed location of the enhanced transfer center is at the intersection of S Salem Street and NC 55. The bus stops at this transfer center would include on street bus stops with pull outs, large shelters with benches, lighting, and real-time passenger information.

Deliverables:

- Prioritized list of recommended improvements at each bus stop

- Design specifications for bus stop improvements and associated cost estimates
- Planning-level determination of right-of-way needs at bus stops based on aerial data and property owner records, including possible NCDOT encroachment.

Primary Roles:

- Town of Apex
 - Provide inventory of conditions and amenities and existing stops
 - Provide prioritized amenities at each recommended stop
 - Provide planning-level determination of anticipated easements or encroachment at each stop
- Town of Cary
 - Provide planning-level design guidelines and associated cost estimates for each stop based on available market information

2.3 Vehicle Information

The project team will develop recommendations for vehicle type, number of vehicles needed for service, vehicle specifications, and vehicle maintenance for the primary bus, back-up bus, and paratransit vehicles, if applicable. These recommendations will be based on public input and the proposed turn-by-turn plan.

Deliverables:

- Recommendations for vehicle type, number of vehicles, and vehicle specifications
- Vehicle maintenance plan

Primary Roles:

- Town of Apex
 - Provide summary information from public outreach to inform vehicle recommendations
- Town of Cary
 - Provide vehicle recommendations

2.4 Paratransit

The project team will identify capital and operations needs as well as the costs associated with paratransit service along the proposed Apex Circulator. The project team will review public input on ADA accommodations and compare costs to develop a recommendation for a service that meets ADA requirements. These requirements will be met through either a deviated fixed-route service or a separate, on-demand service.

Deliverables:

- Capital and operations needs to implement either a deviated fixed-route service or a separate, on-demand service
- Cost estimates for both types of service
- Recommendation for type of service to accommodate ADA requirements

Primary Roles:

- Town of Apex
 - Provide summary information from public outreach to inform paratransit recommendations
- Town of Cary
 - Provide alternatives, costs, and recommended approach for serving paratransit needs

2.5 Fare structure

The project team will review public input on willingness to pay a fare to use the proposed bus service. Based on public input, the project team will determine the potential impacts that a fare may have on ridership. The project team will determine a possible fare amount, a plan for collecting fares, and projected fare revenues. The project team will make a recommendation as to whether a fare will be charged.

Deliverables:

- Possible fare amount
- Plan for collecting fares
- Projected fare revenues
- Recommendation regarding whether a fare will be charged

Primary Roles:

- Town of Apex
 - Provide a summary of public input to inform fare recommendations
- Town of Cary
 - Provide guidance and recommendations regarding fare amount, collection, and projected revenues

Task 3 – Marketing, Branding, and Customer Service Plan

Task 3.1 Branding

The project team will develop a brand for the Apex Circulator and determine how branding will be displayed on the bus, including a plan for instances when the primary bus requires maintenance. The project team will also develop a branding plan for the recommended paratransit service if it is separate from the primary bus. The Apex Circulator brand will be vetted through the Apex Transit Advisory Committee and informed by the Town’s concurrent Branding Study. The project team will consider installing a permanent wrap with the proposed Apex Circulator brand on a primary bus and using a branded magnet on a back-up bus when the primary bus is undergoing maintenance. The “Go” branding will be considered as it illustrates an integrated transit network among the various transit providers in the region.

Deliverables:

- Apex Circulator brand
- Brand display on primary bus

- Branding plan for a back-up bus
- Branding plan for paratransit service

Primary Roles:

- Town of Apex:
 - Provide brand preferences including colors, logo, name
- Town of Cary:
 - Provide options and costs for branding primary and back-up vehicles

Task 3.2 GPS Tracking and Mobile Applications

The project team will coordinate with regional transit application technologies and studies to determine how the Apex Circulator can be integrated with regional mobile applications and Google Maps to provide live updates. GPS tracking information will be integrated with other transit services in the region to allow customers to make bus transfers while on the go.

Deliverable:

- Plan to integrate Apex Circulator GPS tracking into regional mobile application and Google Maps

Primary Roles:

- Town of Apex
 - Participate in coordination with regional provider and study as needed
- Town of Cary
 - Lead coordination with regional provider and study

Task 3.3 Marketing

The project team will develop a marketing plan for the Apex Circulator identifying how the Town of Apex will share information about the new service and encourage ridership.

Deliverables:

- Marketing plan for the Apex Circulator

Primary Roles:

- Town of Apex
 - Lead development of Marketing Plan
- Town of Cary
 - Provide recommendations to inform Marketing Plan and review draft plan

Task 3.4 Customer Service

The project team will develop a communication plan to address customer questions and concerns regarding the Apex Circulator. Customer service for the Apex Circulator will likely be integrated into GoCary's existing customer service program.

Deliverable:

- Technical memorandum outlining a communication plan to address customer questions and concerns

Primary Roles:

- Town of Apex
 - Provide recommendations to inform customer service memorandum and review draft memo
- Town of Cary
 - Draft and revise customer service memorandum

Task 4 – Financial Plan

The project team will develop a financial plan including capital costs, operating costs, and possible fare revenues. Potential capital costs include: a primary bus, right-of-way for bus stop amenities, bus stop amenities, and paratransit vehicles. Potential operating costs include: GoCary’s contracted hourly rate for bus operations, paratransit operations, vehicle maintenance, bus stop maintenance, GPS tracking, branding, marketing, customer service, and future public engagement. Town of Cary staff will project estimated annual ridership and possible fare revenues to include in the financial plan.

Deliverable:

- Financial plan including capital costs, operating costs, estimated ridership, and possible fare revenues

Primary Roles:

- Town of Apex
 - Provide input for and review draft financial plan
- Town of Cary
 - Draft and revise financial plan

Task 5 – Community Funding Area Program Capital and Operations Application and Draft Agreement

The project team will prepare an application for Wake Transit Plan Community Funding Area Program Capital and Operations funding application for the FY20 cycle to implement the Apex Circulator. This plan will include all of the required elements as outlined in the Community Funding Area Program Management Plan. The project team will develop a plan for future public engagement. The project team will prepare a draft capital and operations agreement.

Deliverables:

- Capital and Operations funding application
- Plan for future public engagement
- Draft Capital and Operations Agreement

Primary Roles:

- Town of Apex
 - Prepare draft application, public engagement plan and agreement
- Town of Cary
 - Provide recommendations to inform draft application, public engagement plan and agreement and review draft documents