**Wayfinding Master Plan**

Introduction

Wayfinding Master Plans are eligible in the ACR/TDM Program under the TDM Planning and/or TDM Project Competitive Categories. Wayfinding is a navigable system of signs, icons and other symbols that assists people with guiding them to their destinations. This sample scope of work was designed to approximately fit a total budget of $110,000 ($10,000 from local matching funds and $100,000 from a potential ACR/TDM grant award). The SMCTA On-Call Transportation Planning bench is available in-lieu of local procurement processes as well. This sample is intended to provide potential ACR/TDM Program applicants with this sample scope of work to use as starting point and amend tasks to fit local needs. This scope assumes a citywide project with a focus on key activity centers and major corridors. Based on the parameters provided by the City with regards to the size and scale of the Plan, the geographic focus of outreach, the effort to advertise and solicit feedback and the analysis can be tailored.

Scope of Work

# Task 1 Project Administration & Management

This task focuses on the administrative requirements of the project and can be used to determine the project’s protocols and expectations. Activities under this task include:

* Consultant will facilitate a project kick-off meeting and provide an agenda to review project goals, communication protocols, schedule, deliverables, and meeting dates.
* A Project Management Plan will be developed following the kick-off meeting to detail decisions made at the kick-off meeting.
* Bi-weekly Consultant/City Project Managers should be held to discuss on-going progress and address any scope, schedule, or budget issues as they arise.
* Consultant shall prepare monthly invoices and/or progress reports.

Deliverables include:

* Draft and final project kick-off agenda
* Draft and final Project Management Plan
* Bi-weekly check-in meetings between Consultant/City Project Manager with meeting minutes/action items
* Invoices

# Task 2. Inventory and Evaluation of Existing Signage

Task 2.1 Existing Conditions

This task will assess the City’s current signage program, inventorying the different types of signage, icons, and symbology and how the signage is used. The Consultant shall identify city gateways, primary routes, major areas, points of interest and destinations (cultural, business, shopping, education, parking, recreation, neighborhoods, etc.) where wayfinding is feature and document how the signage is used and make a determination on its efficacy.

Task 2.2 Review of City Guidance

The consultant will review any existing relevant documents, including the City’s ordinance, specific plans, or any policies related to signage or advertising.

The Consultant shall outline potential wayfinding tools (signage, technology, transportation

enhancements, tourism tools, etc.). The Wayfinding Analysis shall include existing physical conditions (city gateways, circulation, parking, pedestrian connections, etc.).

Deliverables include:

* Draft and final Existing conditions report
* Wayfinding Analysis

# Task 3 Wayfinding Goals and Objectives

The consultant will develop goals and objectives for the Wayfinding Master Plan that should include the following:

* Create and implement a user-friendly and visible navigational system that will guide visitors and residents to and from major destinations
* Develop designs and themes that complement the existing wayfinding system while enhancing information sharing
* Incorporate specific transportation services or destinations, including bus and rail stations, ridesharing, bicycle and pedestrian networks
* Identify a phasing and implementation schedule

Deliverables include:

* Wayfinding goals and objectives

# Task 4 Wayfinding Master Plan

The consultant will develop a detailed wayfinding and signage master plan that incorporates the work from Task 2 and 3, and includes transit, bicycle and pedestrian wayfinding along with gateway, destination, regulatory, informational, and other recommended signage. The Master Plan should include schematic drawings so stakeholders can visualize the consultant’s plan.

Task 4.1 Design Development

The consultant will develop inclusive and universal design standards as part of the Wayfinding Master Plan. The design standards will accommodate a wide range of diverse users; from non-English speakers to persons with disabilities, including those with (but not limited to) vision, hearing, and/or cognitive impairment.

The Consultant will develop a recommended terminology and/or icons for locations (landmarks, public facilities, roadways, etc.). The Consultant will work with City staff to provide a set of templates including dimensions, color palette(s), font families, symbols, and layout to allow the system to expand successfully over time. The Consultant will develop maintenance and management requirements and criteria for cleaning, replacing and expansion of the sign program and any software maintenance and upgrades required for virtual wayfinding elements.

# Task 4.2 Cost Estimates

The consultant will develop an order of magnitude cost estimate for the wayfinding elements identified through the design development task.

# Task 4.3 Wayfinding Recommendations

The consultant will prioritize the wayfinding recommendations for phasing and implementation.

Deliverables include:

* Design Guidelines for Wayfinding
* Wayfinding templates
* Wayfinding prioritization and cost estimates

# Task 5 Implementation

The consultant will develop a phasing and implementation schedule. It is expected that the final design, production, and installation of Wayfinding projects would be funded by the ACR/TDM competitive project category.

Deliverables include:

* Phasing and implementation schedule

# Task 6 Draft and Final Wayfinding Plan

The Consultant will prepare a draft and final report documenting the previous tasks.

Deliverables include:

* Draft and Final Wayfinding Plan

Task Budget

|  |  |
| --- | --- |
| **Task** | **Budget** |
| Task 1 – Project Administration & Management | $15,000 |
| Task 2 –Inventory and Evaluation of Existing Signage | $25,000 |
| Task 3 – Goals and Objectives | $5,000 |
| Task 4 – Design Development | $40,000 |
| Task 5 – Implementation | $15,000 |
| Task 6 – Draft and Final Plan | $10,000 |
| **Total** | **$110,000** |

**Primary TA Contact Information** Patrick Gilster, Manager of Programming and Monitoring

Email: [gilsterp@samtrans.com](mailto:gilsterp@samtrans.com) Phone: 650-207-5643