

Scope of Work Checklist

The Scope of Work is the official description of the work that is to be completed during the contract. **The Scope of Work must be consistent with the Project Timeline. Applications with missing components will be at a competitive disadvantage.** Please use this checklist to make sure your Scope of Work is complete.

The Scope of Work must:

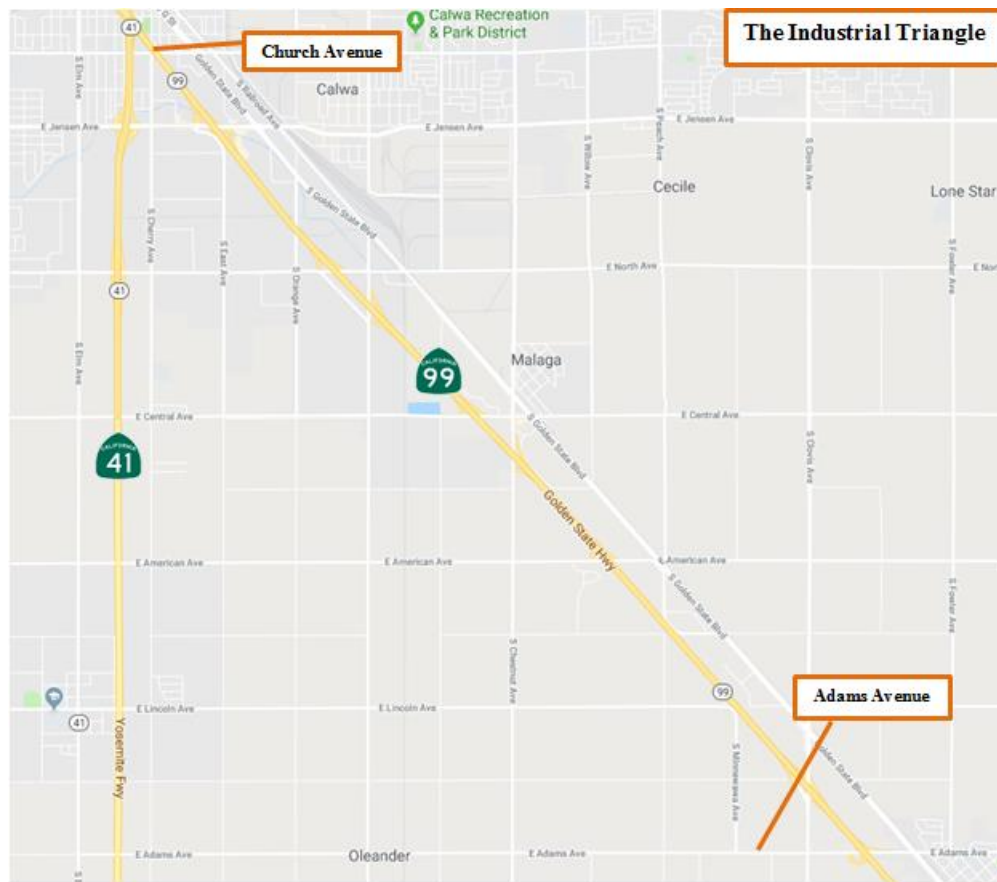
- Use the Fiscal Year 2018-19 template provided and in Microsoft Word format
- List all tasks and sub-tasks using the same title as stated in the project timeline
- Include task and sub-task numbers in accurate and proper sequencing; consistent with the project timeline
- List the responsible party for each task and subtask and ensure that it is consistent with the project timeline (i.e. applicant, sub-applicant, or consultant)
- Include a thorough Introduction to describe the project and project area demographics, including a description of the disadvantaged community involved with the project, if applicable
- Include a thorough and accurate narrative description of each task and sub-task
- Include a task for a kick-off meeting with Caltrans at the start of the grant
- Include a task for procurement of consultants, if consultants are needed
- Include a task for invoicing
- Include a task for quarterly reporting to Caltrans
- Include detailed public participation and services to diverse communities
- Include project implementation/next steps
- List the project deliverable for each task in a table following each task and ensure that it is consistent with the project timeline
- EXCLUDE environmental, complex design, engineering work, and other ineligible activities

SCOPE OF WORK: Infrastructure for Prosperity in the Central Valley's Industrial Triangle (IPIVIT) Plan

INTRODUCTION:

The Central Valley is experiencing new investment and economic growth in the public and private sector. The area often referred to as the “Industrial Triangle” south of downtown is the future home to an Amazon e-commerce distribution center and an Ulta distribution center. Both centers are currently under construction. The area is also the potential location for the California High Speed Rail Heavy Maintenance Facility. Cedar Avenue is the primary north-south route within the area that would provide connections to the potential facility.

As depicted below, the Industrial Triangle is bounded by State Route 41 (SR-41) to the west, State Route 99 (SR-99) to the east, Church Avenue at the north and Adams Avenue to the south. This area makes up the primary project area, with the scope extended along Cedar from SR-99 to Adams Avenue. Maps with additional detail are included in the application package.



According to the Caltrans' [SR-41 Transportation Concept Report](#), SR-41 serves commercial and regional traffic along the corridor, including the transportation of agricultural products. It provides recreational access to Yosemite National Park and a secondary access to Lemoore Naval Air Station (LNAS). The route links the cities of Lemoore, Fresno, and also passes through the unincorporated communities of Kettleman City, Stratford, Coarsegold, Oakhurst, Fish Camp, Wawona, and Yosemite West. The land use in the region and county is largely agricultural in nature, with the exception of the portion passing through the City of Fresno. The entire route is in

the National Highway Network (NHN), a network of roadways important to the nation's economy, defense, and mobility. The route is designated as a High Emphasis Focus Route of the Interregional Road System. High Emphasis routes are characterized as being the most critical Interregional Road System routes, critical to interregional travel and the state as a whole.

SR-99 is the principal north/south freeway in the Central Valley. SR-99 is important as a major lifeline route for industrial, commercial and agricultural purposes and serves as a major commuter route within and between cities located along its length. SR-99 through the Central Valley is widely recognized as an essential trade route, with numerous trade designations including: [Goods Movement Gateway](#) for North American Trade, a [Truck Network](#) and a [Farm to Market Corridor](#) connecting industrial development centers and commercial agriculture clustered around SR-99 to regional and international trade markets. The route is designated as a High Emphasis Focus Route of the Interregional Road System. High Emphasis routes are characterized as being the most critical Interregional Road System routes, critical to interregional travel and the state as a whole.

With recent development, the movement of goods and people through the Industrial Triangle is reaching critical mass. A 2002 *Global Gateways Development Report* finds that on California's highways congestion is becoming a major challenge for both commuters and truck drivers alike. It recommends upgrades to State Route 99 through the Central Valley, emphasizing that upgrades are key to mitigating congestion to maintain California's place in the movement of domestic and international trade.

Due to growth, funding has been applied to begin a Project Study Report for an interchange at SR-99 and North Avenue. Steps have also been taken to update Official Plan Lines (OPL) for Central Avenue to support systematic and orderly development of the area. Producing a project area planning study in strategic partnership with Caltrans, Fresno Council of Governments, the City of Fresno, the County of Fresno and other neighboring jurisdictions is timely and essential for obtaining future funding for infrastructure improvement.

Project Area Demographics

The City of Fresno has approximately 522,053 residents and a median annual household income of \$41,842. The City is home to rich diversity, with nearly 47% of the population identifying as Hispanic or Latino and 12.6% of the population identifying as Asian. The County of Fresno has a population nearing one million people, with an average income of \$44,285. The County of Fresno is also quite diverse with 52.8% of the population identifying as Hispanic or Latino, 10.8% Asian and 5.8% African American.

While there are areas of wealth and abundance, much of the City has been classified as disadvantaged. In fact, according to the CalEnviroScreen (CES) 3.0, the City of Fresno is one of the most disadvantaged areas in the state. Four of the Census tracts in the City rank in the top ten statewide. A map of the area is attached demonstrating disadvantaged status by Census tract. Fresno County is also considered a disadvantaged community per CES 3.0. Disadvantaged communities suffer disproportionate air quality, environmental and health burdens which are compounded by economic challenges. Due to this disadvantaged status, the need for economic revitalization is fundamental to future prosperity.

[The Central Valley was hit particularly hard by the recession, with an unemployment rate as high as 19.8% in 2010. This means that nearly one in every five working adults were unemployed.](#)

The current unemployment rate is 8.2% in the City and 7.5% in the County. These rates are higher than average compared to California's rate of 5.1%. As the community begins to economically recover, planning for multimodal travel options that respond to revitalization is essential to off-setting any negative potential impacts.

Support for State Sustainability Initiatives

This project supports state sustainability initiatives by examining sustainable transportation options, complete street needs and multimodal alternatives to effectively move people and goods through the industrial triangle. Environmental justice and disadvantaged communities will be engaged at community meetings throughout the planning process, which is a priority at state and local levels. The goal of the project is to support a thriving economy with an integrated multimodal transportation system that addresses public health and environmental issues, which is consistent with the overarching theme of the California Transportation Plan (CTP) 2040. The project will study the public health impacts on the disadvantaged communities nearby, which supports the 2017 RTP Guidelines in its efforts to promote public and health equity. The project will also further the State's greenhouse gas emission reduction goal by providing job access to low-income families through clean transportation options such as electric buses, biking, walking, carpool and van pool programs.

RESPONSIBLE PARTIES:

The Fresno Council of Governments (COG) is the primary applicant and will be the responsible party for invoicing, consultant selection, reporting and administering this grant. The City of Fresno and the County of Fresno are co-applicants and will be on the project team. Caltrans District 6 staff will also be on the project team along with other stakeholders identified in Task 1.2. Consulting firm selection will not occur until the grant is awarded and will follow standard COG processes. Estimated costs for a consulting firm are included in the project timeline.

OVERALL PROJECT OBJECTIVES:

The overall project objective is to develop a plan for the project area that will address the potential impacts from the new developments and responds to multimodal travel needs in the area. The plan will be called the Infrastructure for Prosperity in the Central Valley's Industrial Triangle (IPIVIT) Plan.

Objectives of the planning process include:

1. Convening regional partners from multiple jurisdictions.
2. Determining the projected local and regional impact of planned economic developments on the transportation system.
3. Identifying strategies to mitigate the impact of the growing industrial center on SR-99, SR-41, local and regional roadways.
4. Identifying strategies to move people and goods efficiently along SR-99, SR-41 and local and regional roadways, including all ramp termini and intersections.
5. Meaningfully engaging community residents, particularly environmental justice communities and employers.
6. Collecting counts and data relevant to prioritizing recommendations and calculating cost/benefit ratios for priority projects.
7. Develop implementation measures, prioritize recommendations for investment, develop conceptual layouts and identify potential funding sources.

1. Project Initiation and Coordination

Task 1.1 Kick-Off Meeting

- The kick-off meeting will define Fresno COG, the City of Fresno and the County of Fresno's responsibilities as Caltrans Sustainable Transportation Planning Grant Program grantees.
- **Responsible Party:** Fresno COG, City of Fresno & Fresno County

Task 1.2 Project Team Meeting

- The Project Team meeting will include a discussion of the project, stakeholders to engage in the process and the data/plans needed to successfully begin the planning process.
- Meeting attendees will include (but are not limited to): Fresno COG, the City of Fresno, Caltrans, Fresno Area Express (FAX), Fresno County Rural Transit Agency, Fresno County, other small cities within Fresno County, CA High Speed Rail Authority, Southwest Specific Plan Committee members, and Transformative Climate Community resident representatives.
- The meeting will introduce the team, define lines of communication, verify the review and approval processes, finalize the project schedule, determine coordination meeting frequency and schedule, discuss overall project vision and final scope of work for the grant.
- A Meeting summary will be documented.
- Caltrans will serve as a project team member.
- **Responsible Party:** Fresno COG

Task 1.3 Consultant Selection

- Following standard procedures, a competitive RFP process will be initiated to select a consultant team to execute this planning project.
- **Responsible Party:** Fresno COG

Task 1.4 Consultant Kick-Off Meeting with the Project Team

- The Kick-Off meeting will include a discussion of the scope of work, stakeholders to engage and data needed (maps, files, relevant planning documents, etc.) to successfully begin the planning process. The consultant will seek input from the Project Team on the data collection in Task 2, such as data types and data collection location etc. The Project Team will also provide input on the stakeholder groups to be involved in the process.
- Meeting Summary will be documented.
- **Responsible Party:** Consultant/Fresno COG

Task 1.5 Coordination Meetings

- Fresno COG will have meetings with consultants to ensure questions are resolved, communication remains open and tasks are completed according to the planned schedule and agreed upon budget. Caltrans will be included in coordination meetings.
- Meeting Summary will be documented.
- **Responsible Party:** Fresno COG

Task 1.6 Review Existing Plans

- In order to get familiar with adopted plans, get a sense of the unique places within the City/County that have been established over the years, ascertain historical community priorities and gather context for the project, the consultant will review relevant documents.

- Documents to be reviewed include but are not limited to: City of Fresno Active Transportation Plan, Parks and Trails Master Plan, Caltrans Smart Mobility Framework – Smart Mobility Principles, Fresno Council of Governments Active Transportation Plan/Fresno County Active Transportation Plan, Fresno COG 2018 RTP/SCS, the Measure C Expenditure Plan, the Southwest Fresno Specific Plan, City of Fresno General Plan, County of Fresno General Plan, High Speed Rail Documents, the 2018 SR-99 and North Project Study Report and any other relevant documents identified in Task 1.2 – Project Team Meeting.
- Findings will be summarized.
- **Responsible Party:** Consultant

Task	Deliverable
1.1	<i>Meeting notes</i>
1.2	<i>Meeting notes</i>
1.3	<i>RFP documentation and consultant agreement</i>
1.4	<i>Meeting notes</i>
1.5	<i>Meeting notes</i>
1.6	<i>Summary of findings</i>

2. Data Collection

Task 2.1 Local & Regional Data

- Gather data to determine the projected local and regional impacts of planned developments on the transportation system.
- Collect data on travel patterns related to employment and freight/goods movement on local roadways, SR-99 and SR-41.
- Consider data in the context of planning documents reviewed in Task 1.6 – review existing plans.
- **Responsible Party:** Consultant

Task 2.2 Project Area Data

- Consultant will gather existing data from Caltrans, City of Fresno, Fresno County and Fresno COG.
- Visit the project area to observe and document existing conditions.
- Collect images of existing conditions.
- As needed, Consultant will collect counts for bicycle and pedestrian trail, train travel, traffic volumes and other relevant data.
- **Responsible Party:** Consultant

Task 2.3 Plan Line Data – Cedar Avenue: SR-99 to Adams Ave.

- Conduct utility research from record drawings, City and county GIS data and pending utility projects.
- Prepare a topographic survey within the plan line limits.
- Resolve right-of-way and prepare conceptual base drawing of the topographic survey.
- Prepare preliminary plan lines for review.

- Process is intended to be conceptual to aid in evaluating the area’s transportation needs and does not include CEQA.
- **Responsible Party:** Consultant

Task 2.4 Project Team Review

- Project team meeting to provide comments and feedback on the existing condition data collection
- **Responsible Party: Consultant**

Task 2.5 Caltrans Review

- Caltrans to receive and review data collection.
- Caltrans to provide written comments.
- **Responsible Party:** Caltrans

Task	Deliverable
2.1	<i>Summary of data collected, data files</i>
2.2	<i>Summary of existing conditions, images</i>
2.3	<i>Preliminary plan lines, data</i>
2.4	<i>Meeting notes</i>
2.5	<i>Written comments</i>

3. Public Outreach and Community Engagement

Task 3.1 Community Engagement Plan (CEP)

- An Engagement Plan will be produced identifying key stakeholders and organizations the consultant will partner with to invite residents to weigh in on the planning process. Key stakeholders should include public and private representatives, such as local employers, community based organizations, representatives from local jurisdictions, etc.
- Special attention will be given to ensure minority and low-income environmental justice communities in disadvantaged areas are included. The *Spectrum of Public Participation* will be consulted in development of the CEP.
- An initial list of stakeholder partners will be generated in Task 1.4 - Project Team Meeting.
- Community meetings will be promoted through partnership with stakeholders and City/County public notice. Public notices to include information in English, Spanish, Hmong and other languages as requested.
- Plans to provide translation services at community meetings should be included in the CEP. Translation services to include Spanish and Hmong, other languages as requested.
- The draft CEP will be submitted to Caltrans for review and approval.
- **Responsible Party:** Consultant

Task 3.2 Project Team Meeting

- Project team to review the CEP and provide comments/feedback
- **Responsible Party: Consultant**

Task 3.3 Caltrans Review

- Caltrans to receive and review Community Engagement Plan.
- Caltrans to provide written comments.
- **Responsible Party:** Caltrans

Task 3.4 Community Meeting Promotion

- Prior to each community meeting, follow-up will be done with stakeholders to ensure community promotion goals are supported. Multi-lingual flyers and social media verbiage will be provided to stakeholders to support promotion efforts.
- Relevant information will be provided to Project Manager or designee for public noticing.
- Consultant should use multiple methods to advertise and promote meetings to increase attendance including: email, flyers, social media, print media, radio and video, as appropriate.
- Contact engaged residents to invite them to community meetings. A list of engaged citizens that have participated in prior planning efforts will be provided to consultant to support promotional efforts. This list will be gathered from COG, the City of Fresno and the County of Fresno.
- **Responsible Party:** Consultant

Task 3.5 Community Meetings (4) & Public Comment

- Four meetings will be held at or near the project area. One prior to drafting the plan, one during drafting, and two to discuss the draft plan.
- Simultaneous translation services will be provided.
- A presentation will be provided to attendees explaining the purpose of the project.
- Meeting facilitators will collect input related to residents travel needs, concerns and recommendations.
- Upon completion of Task 4 – draft plan and Task 4.1 – review meeting, the draft plan will be released for public comment.
- Meetings will be promoted following the methodology used in Task 3.3 – community meeting promotion.
- Community meetings will be held near the project area.
- Comments will be incorporated into the plan.
- **Responsible Party:** Consultant

Task	Deliverable
3.1	<i>Plan document</i>
3.2	<i>Meeting notes</i>
3.3	<i>Written approval</i>
3.4	<i>Flyers & promotional materials</i>
3.5	<i>Meeting summary, meeting materials: images, handouts, sign-in sheets</i>

4. Draft Infrastructure for Prosperity in the Central Valley’s Industrial Triangle (IPIVIT) Plan

Task 4.1 Produce Draft IPIVIT plan

The draft plan will be produced following Task 2 - data collection and Task 3.4 - community meetings.

At a minimum, the plan will

- A. Identify potential impacts from the industrial triangle. Such impacts include (but are not limited to) traffic, air quality, public health, roadway preservation, etc.
- B. Develop mitigation measures that will address the following areas:
 - Multimodal infrastructure needs
 - Public transportation needs
 - Existing system preservation
 - Capacity enhancing options
 - Travel alternatives and program recommendations for carpool and vanpool
 - Accessibility and connectivity in the project area and region
 - Mitigation to minimize traffic, air quality, public health and other project related impacts to residents
 - Safety considerations
 - Grade separation needs
 - Preliminary/conceptual plan lines for Cedar Avenue
 - Major intersection analysis
- C. Recommended implementation prioritization of the mitigation measures, including a discussion of the basis for prioritization of investments. An implementation plan will be included with the prioritization.
- D. Quantitative and qualitative cost-benefit analyses for prioritized projects utilizing Caltrans B/C ratio tool and/or other appropriate tools.
- E. Conceptual layouts for priority investments which can be used for future grants.
- F. Cost estimates and potential funding sources will be listed within the document in a funding matrix
 - **Responsible Party:** Consultant

Task	Deliverable
4.1	<i>Draft plan with implementation plan and funding matrix</i>

5. Plan Finalization

Task 5.1 Hold a Review Meeting

- Meet with the project team for the purposes of holding a comments review meeting. Review comments collected from the community.
- Incorporate reviewed comments and revisions into the draft produced.
- A copy of the draft to be provided to the Fresno Council of Governments, City of Fresno, County of Fresno and Caltrans prior to the public comment period.
- Meeting summary will be documented.

- **Responsible Party:** Consultant

Task 5.2 Finalize IPIVIT Plan

- Make edits to the final draft of the plan incorporating public comments.
- **Responsible Party:** Consultant

Task 5.3 Final Draft to Caltrans

- Provide final draft to Caltrans for review and approval.
- **Responsible Party:** Consultant

Task 5.4 Final Plan

- Incorporate comments from Caltrans review in Task 5.3 – final draft to Caltrans, and create final plan to be presented to the Fresno COG Board.
- **Responsible Party:** Consultant

Task	Deliverable
5.1	<i>Meeting notes</i>
5.2	<i>Final draft plan</i>
5.3	<i>Caltrans written comments & approval</i>
5.4	<i>Plan document</i>

6. Fresno Council of Governments Board Adoption

Task 6.1 Present Plan to Fresno COG Board

- Upon approval from Caltrans the plan will be presented to the Fresno COG Board for approval.
- **Responsible Party:** Fresno COG & Consultant

Task	Deliverable
6.1	<i>Board meeting minutes</i>

7. Fiscal Management and Reporting

Task 7.1 Project Management

- Oversee the project by working directly with consultant(s) to ensure all tasks and deliverables are completed on-time and on-budget.
- Serve as point of contact with Caltrans.
- **Responsible Party:** Fresno COG

Task 7.2 Invoicing for Reimbursement

- Submit complete invoice packages to Caltrans District staff based on milestone completion, at least quarterly, but no more frequently than monthly.
- Expectations for invoicing to be discussed as part of Task 1.1 – Kick-Off Meeting.

- Co-applicants will provide third party in-kind documentation to Fresno COG as part of matching fund requirements.
- **Responsible Party:** Fresno COG

Task 7.3 Reporting

- Progress reports will be submitted to Caltrans quarterly.
- Expectations for reporting to be discussed as part of Task 1.1 – Kick-Off Meeting.
- Reports to include a summary of progress and expenditures.
- **Responsible Party:** Fresno COG and Consultant

Task	Deliverable
7.1	<i>Achievement of project milestones</i>
7.2	<i>Invoice packages</i>
7.3	<i>Reports</i>