

# Scope of Services

## Task 1: Project Management

The project management effort will be led by Mike Arizabal, who will serve as the primary point of contact for project partners and will be responsible for the deliverables submitted under this contract. The project management effort will be ongoing throughout the duration of the project. This task includes oversight of the consultant team, and the administrative tasks required to support the overall project. Within this task, IBI Group will manage and oversee all administrative, contractual, and technical aspects, of the study to ensure timely and integrated production of tasks to achieve the study objectives.

### Kick-Off Meeting

Our first order of work after the Notice to Proceed (NTP) will be to schedule a project kick-off meeting with all project partners including at a minimum City of Fresno, the District, Fresno COG, and the County of Fresno. This meeting will have the purpose to introduce the team, review project objectives and requirements, and establish lines of communication and procedures/protocol, recurring project meeting frequency, progress reporting, scheduling and invoicing, and other relevant project information. IBI will have reviewed all previous and current planning efforts related to the AB 617 area and ensure work efforts are coordinated and that information is shared accordingly. The IBI Team shall be responsible for providing a summary of the meeting and identification of key action items.

### Work Plan

This proposal and associated deliverables within this proposal are the first steps in creating an effective work plan. The work plan is intended to serve as a quick reference to the project management team, task leads, and the City and District. The work plan will include procedures and protocol for managing resources, communications, budgeting and the project milestones and schedule. The work plan will also allow for clear monitoring, reporting, and quality assurance of each individual task status. The work plan will identify and foresee all potential issues and constraints and prepare for their effective resolution before they may potentially occur.

### Project Schedule

The project schedule will also be presented at the kick-off meeting. The schedule will be finalized as a Gantt chart and will include individualized and detailed work tasks, start dates, activity durations, product submittal dates, key project milestones, and relationships among work tasks, including critical path items. The project schedule will be no greater than 18 months from the start date as stated in the RFP. IBI Group understands that the submitted draft project schedule will be reviewed by the City Project Manager and key stakeholders throughout the study process. A final schedule will be included in the work plan.

### Project Management Calls/Meetings

IBI Group will conduct regular project status meetings with the City and District Project Managers on a bi-weekly basis throughout the duration of the project (up to 20 meetings). These meetings would be conducted via video conference call (Teams, Zoom, or Skype) and will be scheduled for an hour depending on project needs. We will establish a regular meeting schedule and time that works for all parties. The purpose of these meetings will be to discuss ongoing and upcoming project work efforts and to ensure that IBI and project partners are on the same page with regard to the project progress. A key element of these progress meetings will be to discuss work efforts in relation to the overall project schedule and budget. IBI's Project Manager, Mike Arizabal, will be available for impromptu "check-ins" via phone or email throughout the duration of the project.

KPA will participate in these project team meetings to provide community meeting and stakeholder meeting summaries, issues, and attitudes towards mitigation measures. KPA will also respond to phone calls and emails to maintain communication with the team through the duration of the project. For budget purposes, KPA is assuming 6 hours a month for every month of project communications. Well before each meeting, IBI Group will send out agendas for the Project Management Calls that will include the project status, updates on the project schedule, deliverables, and summaries of meetings with the advisory committee and stakeholders. These meetings will be complete with notes, minutes, and summaries that will be uploaded to a file sharing system soon after the conclusion of each project management meeting.

## Filing Sharing System

IBI Group will set up a file sharing system shortly after the conclusion of the initial Project Kick-off Meeting. The service platform that will serve as the file sharing system will be chosen in the Kick-off meeting. In past projects, IBI Group has used a secure and protected Microsoft SharePoint project folder that would be specifically created for this project. The file sharing system would be a site to exchange draft and final work products, schedule information, contact information, meeting info and minutes, and all necessary information required to complete the study. IBI also uses Microsoft Teams, Miro, and Google Drive as means to share files and collaborate if necessary.

## Project Invoicing and Quarterly Reports

In the management of this project, IBI Group will prepare invoice packages with the City to submit these to District staff for review and approval based on milestone completion. The invoices and progress reports will conform to City requirements. The invoicing will include the budgeted amount, percent complete, and the remaining balance for each task and subtask. The purpose of the monthly invoices and progress reports is to document the project progress against projected efforts and allow for timely payment of prime and sub-contractors consistent with efforts expended and progress achieved.

IBI Group is aware that the City and District will be submitting quarterly reports to the AB 617 Community Steering Committee (CSC) and City Council members providing a summary of project performance and funding expenditures. IBI Group will coordinate with the City and District on these reports.

### Task 1 Deliverables

- *Kick-off Meeting Materials and Summary Notes*
- *Project Work Plan and Schedule*
- *Bi-Weekly Project Call Meeting Notes and Summaries*
- *Project File Sharing System, Invoicing Template and Quarterly Reports*

## Task 2: Outreach and Engagement

The IBI Group Team understands that the public and agency outreach effort is an important component

of the project and has teamed with Katherine Padilla & Associates to deliver a public outreach approach that will integrate the input of stakeholders within the South Central Fresno community, while providing the best possible solutions. The IBI Team recognizes the importance of developing a robust and dynamic public outreach approach to engage as many community members and stakeholders as possible and to expand the reach of the project to a diverse audience.

IBI understands the challenges related to outreach, especially in disadvantaged communities. Traditionally, outreach to disadvantaged communities can be a challenge as residents are apprehensive to engage with public officials and staff due to immigration status or distrust of the traditional planning process. The IBI Team has a long history of implementing public outreach strategies that are truly innovative and engaging across California. As a part of our recent work efforts on the Metro Transit Supportive Planning Toolkit, we helped to identify a variety of public outreach tools and strategies for local agencies to use to communicate their projects. The toolkit outlines specific public outreach tools for engaging a wide variety of community members and to keep them engaged. Some of these tools and strategies that would be applied for the South Central Fresno community include:

- **Multiple Modes of Communication** – Using multiple modes of communication can extend project reach and ensure multiple groups feel heard. Aside from the conventional in-person community meetings, other engagement tools such as live streaming or web streaming of meetings should be made available to those who are unable to attend.
- **Make Engagement Interactive** – Using action-oriented, interactive, and in-the-field outreach strategies makes it easier for people to digest projects and to submit input to revise, test, and fix ideas. Interactive engagement also casts a wider net of measurable responses because citizens are encouraged to participate, not just listen to potential solutions.
- **Use Visual Tools to Engage** – Visual tools such as 3D models or renderings should be incorporated into community outreach efforts to illustrate how projects can be tailored to fit and remain consistent with existing community characteristics.

## Stakeholder and Public Engagement Plan

At the kick-off meeting, or shortly thereafter, KPA proposes holding a Stakeholder Analysis Session with City and District staff to discuss key stakeholders, such as community-based organizations, key trucking companies and their representatives, and representatives from affected neighborhoods, in order to match outreach tactics with the stakeholders' communication needs and the appropriate level of engagement. KPA will present a preliminary list of CBOs, businesses, transportation groups, government entities, and other stakeholders for discussion purposes.

After the stakeholders analysis session, KPA will produce a Stakeholder and Public Engagement Plan which will include social media and traditional media strategies, development of press releases, and describe how we will tap into the city's channels of information and those of other key organizations to maximize the exposure of project information and input opportunities. Engagement strategies may include briefings, interviews with stakeholders, focus groups, announcements and presentations to CBOs, or emails and invitations, social media and press releases.

As part of the Stakeholder and Public Engagement Plan, KPA will also develop Key Messages ("talking points") that describe the project, its goals and objectives, the schedule, and opportunities for community input and feedback, especially to seek the opinions to traditionally disenfranchised communities. The Key Messages serve as a foundation for communication about the project. Additionally, KPA will produce a "process diagram" which will graphically illustrate in a community-friendly manner all strategies, community input opportunities, and how they are aligned with decision points leading to Study milestones. It is understood that KPA will work closely with the City and District to finalize and execute the Stakeholder and Engagement Plan.

The Plan will include the methodology for soliciting, responding to, and documenting stakeholder input and will also describe the role of stakeholders in the decision-making process and will detail how study progress will be disseminated. The Plan will include a section outlining and identifying procedures for integrating and accommodating diverse and conflicting priorities among stakeholders.

The Plan will include a full methodology describing the specific outreach strategies used to accommodate participation for those who speak

various languages, with a focus on Spanish and Hmong speakers as over 44% of residents in the affected region are of either of Hispanic or Hmong origin and about a quarter of residents in the same region speak English less than "very well". In this task, outreach will be provided in other languages as deemed beneficial to reach as many members of the public as possible. Not only will the Spanish and Hmong languages be full represented in all community outreach events, but IBI Group will ensure an equal opportunity for all community members to participate. Importantly, community input will provide the foundation for guiding principles, evaluation criteria for mitigation measures, and recommendations, which shall also be informed by technical analysis and best practices presented by the Project Team.

## Project Database

Over the course of this study, IBI Group and KPA will foster a deep knowledge and understanding of stakeholders and their issues, concerns, and recommendations. For this study, we recommend strategically targeting our engagement efforts and developing a project database to facilitate on-going communication with key property owners, residents, local businesses (especially the affected industrial complexes), local schools, Chambers of Commerce, major employers, City offices, elected officials, civic groups, transportation and transit agencies, sensitive receptors, emergency responders, private entities, community organizations, and other identified local stakeholders to be determined. IBI Group and KPA will build upon existing lists provided by the City/District and original research. The contact list will be updated on a regular basis and/or as needed.

## Technical Steering Group and Community Advisory Group

In coordination with the Project Team and the City, the IBI Group and KPA will assist with the formation of a Technical Steering Group (TSG) and Community Advisory Group (CAG) comprised of representatives of key stakeholder groups to serve as a sounding board. These groups would offer input to the project team about our methodology, assumptions, project milestones, and key deliverables, including outreach strategies, Guiding Principles, evaluative criteria for mitigation strategies, and draft recommendations. IBI Group Team will work with the City and District to schedule TSG and CAG meetings to solicit feedback

about the overall project, as well as on specific deliverables, including the Project Guiding Principles.

KPA will establish the CAG and TSG in coordination with the City and District. KPA will provide a draft email-letter to send to invitees that describes the project background, objectives, expected number of meetings, committee role and responsibilities. KPA will support TSG and CAG meetings by conducting the following tasks: coordinate the logistics of meetings, notifications, attend the meetings, and provide action-oriented minutes with 48 hours of the meetings. It is understood that Technical Team members will provide the content and agenda for the meetings. KPA shall attend up to six (6) TSG meetings as needed and shall convene and facilitate six (6) CAG meetings and provide summary notes.

IBI Group will prepare a schedule for each TSG and CAG meeting that will show project objectives and deliverables. Coordination activities include securing meeting venues, notification, agendas, exhibits and presentation materials. Meetings may be in-person, via videoconference or teleconference.

### **Stakeholder Interviews (up to 16)**

In collaboration with the Project Team, KPA shall interview two groups of 6-8 key stakeholders to be selected by the City and District to identify key concerns and opportunities for mitigation options. Group 1 shall consist of businesses and Group 2 to be composed of residents. KPA shall work with the team to develop the interview guide to explore key questions and shall write a report summarizing key issues and opportunities.

### **Task 2 Deliverables**

- *Engagement Strategy, Final Version*
- *Stakeholder Coordination and Public Engagement Plan*
- *Outreach and Engagement Summaries, Materials, and Attendance Lists*
- *Project Guiding Principles, Draft Version*
- *Establish TSG and CAG, with preparation and attendance at up to six (6) meetings per group (12 total), along with meeting materials, agendas, and minutes*
- *Up to 16 interviews with stakeholder groups, with interview guides and written summaries*

## **Task 3: Existing Conditions Report**

Creating a foundation of data of existing conditions is crucial for the accurate assessment of the study area. The existing conditions will serve as the baseline for all recommended improvements related to truck rerouting. The Existing Conditions Report will include an introduction (background and purpose), study area description (location, regional significance, transportation facilities), demographic conditions (population and employment), land use (existing land use, key destinations/activity centers/employment centers), relevant planning documents and data (transportation/mobility, general plans, specific plans, regional plans, climate plans, etc.), truck mobility conditions (volumes, VMT, OD, collisions), policy review (local transportation policies, regional and state policies and guidelines), and equity analysis (disadvantaged communities, public health metrics/conditions and demographic conditions). Highlights of the Existing Conditions report include:

### **Literature Review and Data Synthesis**

IBI Group has already began the literature review process of relevant previous studies, plans, and other documents for the South Central Fresno area, for developing a meaningful and thoughtful project understanding. The extended review will include City, County, and Caltrans truck permitting processes, National Freight Network, current truck routes, and local agency plans such as truck restriction ordinances and routing plans. IBI Group will synthesis and summarize all the pertinent studies, policies, plans, and other documents with the goal of identifying gaps and/or areas that need updating. This information will be crucial in identifying alternative truck routes and what level of coordination is needed.

### **Existing Data Sources**

IBI Group will review and obtain all existing data related to truck trip origin-destination, traffic volumes on current and proposed truck routes, truck GPS data. Understanding who the major truck trip generators are and where they originate and where they are destined to is paramount to this study. IBI Group will obtain outputs from the Regional Travel Demand Model (Fresno Council of Governments (COG) Activity Based Model (ABM)) related to travel patterns, VMT, and volumes. IBI Group will work with



the City, County, Caltrans and District to identify and obtain all sources of existing traffic count and classification data. Recent and/or current planning studies in the area will also be reviewed to identify additional sources of traffic data.

### Data Collection Plan

While synthesizing data that currently exists is only one aspect of the data collection process, IBI Group recognizes that much of the necessary traffic data is not readily available through existing avenues. Because of this, a strategy will be implemented outlining best practices to acquire all necessary traffic data required to accurately present existing conditions. It is assumed that the City of Fresno will collect and provide classified count data along all existing and proposed truck routes for the South Central Fresno Community, as shown on the September 2005 Truck Route Map. Additional classified count data will be provided by the City of Fresno along potential routes proposed through the community engagement process or as requested by the AB 617 subcommittee on Truck Re-Route Study. However, IBI will develop an existing data collection plan based on any gaps identified in the existing literature and data source review. New data collection can include, but not be limited to, traffic counts, vehicle classification counts, OD studies, license plate surveys, street geometries/signage, active transportation data, rail volumes and train frequencies.

### Existing Physical Characteristics and Community Impacts

IBI Group will provide a comprehensive summary of all existing physical characteristics of the study area, along with an identification of community impacts related to truck movements. IBI will conduct a search of the Statewide Integrated Traffic Records System (SWITRS) and the Transportation Injury Mapping System (TIMS) to review collision reports for the most recent five-year period in the area and research air quality issues through the California Air Resources Board (CARB) Community Air Monitoring Plan for the South Central Fresno community. IBI will also utilize GIS along with the California Office of Environmental Health Hazard Assessment (OEHHA) CalEnviroScreen to develop indicators related to exposure, environmental effects, sensitive population, and socioeconomic factors to score the South Central Fresno Community. This task will also inventory roadway characteristics and pavement condition, noise issues, VMT impacts (from the model),

operational impacts (localized intersection, freeway, and roadway segment level of service and capacity analysis), and the interface between high volume truck routes and school, pedestrian, and bicycle facilities.

### Conceptual Design

IBI's Civil and Traffic Engineers will develop conceptual plans and truck turning templates (AutoTurn) along all identified new truck routes, with samples at up to ten (10) locations. Conceptual drawings will be planning-level with the purpose of showing sample cross-sections and improvements within available right-of-way.

### Task 3 Deliverables

- *Truck Routing Study Existing Conditions Report, Final Version*

## Task 4: Report National Best Practices for Accommodating Trucks

IBI Group has an existing data base of national best practices related to minimizing truck impacts in and around neighborhood communities. This data base was created for IBI's work on the Wilmington Freight Mitigation Study and will be utilized for this study. This includes literature from Federal Highway Administration (FHWA), various Departments of Transportation across the United States, and various NCHRP reports that discuss truck parking, truck demand management (alternative delivery schedules), and neighborhood intrusion.

### Task 4 Deliverables

- *Truck Management Approaches Report*

## Task 5: Recommended Truck Routes, Community Strategies, and Implementation Plan

The culmination of all work in the previous tasks will be presented in the Truck Routing and Implementation Plan. The elements from Tasks 2 through 4 will culminate in a “state of the system” chapter of the Implementation Plan. This will include socioeconomic data, transportation policies, major truck origin/destination patterns, roadway conditions, and regulatory framework. The IBI Group team will use the data from the existing conditions analysis, previous planning efforts and public outreach feedback to design and map the proposed new truck routes. Connectivity to existing and planned facilities in adjacent cities will be considered to develop a complete and detailed list of future projects that will be prioritized for implementation. Each project will include a brief project description, including project-specific information and potential constraints, such as right-of-way acquisition and grades.

Prioritization directly supports future grant applications since most grants require evidence that prioritization was considered when ranking potential projects. The IBI team will work with City and District staff to create a framework and metrics for prioritizing and ranking projects based on the data and input collected during previous tasks, giving special emphasis to values and priorities expressed by the public. Criteria may be weighted to reflect relative importance for achieving project objectives and goals. The criteria may be presented to the TSG and CAG, or publicly via community engagement events, for feedback to verify the prioritization approach.

The prioritization process will also consider community needs; regional, county, physical and social barriers, safety, and statewide policy and funding frameworks; and the timeframe for implementation, including TSG, CAG, City, County, and District staff input.

The IBI Group Team has extensive experience developing prioritization frameworks that reflect local values and consider both the strategic and implementation criteria needed to inform decision making. Strategic criteria are used to inform program

design, reflecting core values and longer-term ambitions, whereas implementation criteria include elements such as readiness and partner support.

The outreach and engagement effort, coupled with the existing context and challenges for the future of the transportation system will inform the potential truck routing solutions that will be developed. The IBI Group team will focus on recommendations that address equity, safety, and community concerns, while maintaining the efficient movement of goods.

The IBI Group Team collectively brings a deep and diverse understanding of local, state, and federal funding sources and programs. Additionally, our team’s extensive work with regional planning agencies allows us to provide the City and district with the benefit of our experience in evaluating how available funding should be allocated as part of a regional plan to ensure equitable access to funding opportunities. As part of this element of the Implementation Plan, we will prepare a funding matrix that identifies sources, pursuit requirements, potential uses of funding, timelines, and eligible projects and programs.

IBI Group will provide a complete, clear, and concise report that documents all the work efforts from Tasks 2 through 4, including tables, maps, and/ or other graphics. One of the maps will be the proposed updated to the 2005 City of Fresno Truck Route Map. IBI will also provide the City and District with a section that describes any modifications to the City’s Truck Route Ordinance. The report format and structure will lean towards one that is easily digestible by the public or others that may wish to utilize the document for guidance on future planning efforts and grants in the South Central Fresno community area.

IBI assumes up to two (2) rounds of review of the Draft Implementation Plan by the City and District and one (1) round of public review. IBI will provide one (1) set of consolidated and reconciled comments on all draft documents to the City and District. IBI Group has also allocated time for up to one (1) Planning Commission Hearing and two (2) City Council Hearings.

### Task 5 Deliverables

- *Truck Routing and Implementation Strategy*
- *Revised City of Fresno Truck Route Map*
- *City of Fresno Truck Route Ordinance*