

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 2017-18 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: Salinas Safe Routes to School Plan

INTRODUCTION:

Salinas has a serious traffic safety problem that disproportionately affects children. Nearly one third of Salinas residents are under the age of 18, and sadly they represent over one third of collisions involving bicyclists and pedestrians. Over the past 10 years 337 children have been hit and injured while walking or biking and 3 children have been killed. This traffic safety issue is widespread, growing, and apparent in every school district across the City. The Salinas Safe Routes to School Plan is proposed in response to requests from the community to address the serious and growing traffic safety problems citywide.

This Plan will examine conditions at 44 schools in four districts serving a total of 37,015 students. It will provide the City of Salinas with a comprehensive approach and tools to improve unsafe conditions around schools and reduce barriers to walking, biking, taking the bus and carpooling to school. This plan will provide the basis for future investments in infrastructure by the local Measure X Safe Routes to Schools program, the SB 1 local road rehabilitation program, and the infrastructure portion of the Active Transportation Program. Founded on a public partnership, this plan will involve active participation by parents, school administrators, neighbors, City staff and officials, County Public Health, community advocacy groups and students from forty-four K-12 schools. This proposed plan will be similar to the Santa Cruz City Schools Complete Streets Master Plan (funded by Caltrans in 2013) which resulted in a \$1.4M ATP Cycle 2 infrastructure grant. It will also be modeled after the Seaside & Marina Safe Routes to School Plan that is currently underway and was funded by a Caltrans Sustainable Transportation Planning Grant and local sales tax Measure X.

The City of Salinas has a population of 157,596. A largely Spanish-speaking community, 76% of residents are Latino, 14% are white, 6% Asian, 2% African American, 1% American Indian and 1% Other. Salinas is the largest city in the Monterey Bay region, the county seat and is the commercial and residential hub of the Salinas Valley.

According to the California State Ed Data site 76% of Salinas City public school students qualify for Free and Reduced Meals, (a sign of low income status) and 50% of students are English language learners.

Many Salinas school children will be the first in their family to receive a high school education, and have no choice other than to walk or bike to and from school. To achieve higher education, it is vital that students have safe places to walk and bike so they can attend school consistently and unharmed.

Childhood obesity is also of great concern in Salinas. On average, 50% - 60% of 5th graders in Salinas are overweight or obese. This project will identify opportunities to encourage healthier travel and daily exercise such as walking, biking, skateboarding and scootering to school.

This study will be an important step towards creating healthy and safe pathways for youth by evaluating how the streets in Salinas can better accommodate the needs of all users.

PROJECT DETAILS & PUBLIC PARTICIPATION:

The plan will provide a systematic and comprehensive assessment and analysis of the greatest barriers to increased school-based active transportation and access to public transit and carpooling. The project will provide decision makers with a publicly vetted and prioritized project list that reflects participation from a broad range of stakeholders and public participants to facilitate improvements going forward. Community input will be solicited during every step of the project. The public will be invited to participate in community meetings, focus groups, walking/biking audits, submit comments at public meetings, at the school-site display boards, through an online portal, as well as participate in parent surveys. All communication will be graphic-heavy and minimize text to reach parents of all reading levels. All text will be provided in English and Spanish.

RESPONSIBLE PARTIES:

The Transportation Agency for Monterey County will be responsible for overseeing the plan's delivery, coordinating partnership involvement, participating in public outreach (including involvement of the Bicycle & Pedestrian Facilities Committee and the Measure X Oversight Committee), providing project information via an online Safe Routes to School resource hub, developing partnerships and collecting information needed to start a school carpool pilot, identifying potential funding sources for implementation, and administering the grant.

Ecology Action (Sub-Applicant) will lead the development of the plan, assist with organizing the public outreach and data collection process, and hire and manage a technical consultant for the project using a competitive Request for Proposal process.

The Monterey County Health Department (Sub-Applicant) will lead the public engagement process with a special focus on disadvantaged communities in the project area. They will reach out to key stakeholders including but not limited to parents, schools, school districts, elected officials, advocacy groups and health providers to help identify specific health and safety needs within the community as well as opportunities for safe routes to school partnerships. Due to the high percentage of Spanish speakers in the community, meetings will be held in Spanish with English translation or accommodations will be made for non-English speakers. The Health Department will provide bilingual staff at all community engagement meetings and events and translation services and equipment as needed.

The City of Salinas (Sub-Applicant) staff will participate in public engagement activities (including engagement with the City's Traffic Commission) and walking audits, evaluate project recommendations to ensure consistency with City policy and planning documents, develop recommendations for policy changes in line with the Plan's objectives, review and approve the list of recommendations and draft plan and adopt the final planning document.

OVERALL PROJECT OBJECTIVES:

- Identify greatest barriers for active trips to school (walk, bike, skateboard & scooter).
- Identify improvements that would increase pedestrian and bicyclist safety.
- Identify low cost, non-infrastructure solutions to increase school-based active trips.
- Identify barriers to public transit and carpooling to schools.
- Identify low cost and community generated non-infrastructure solutions to traffic congestion at schools.
- Produce a plan to guide future infrastructure improvements that reduce school-based traffic congestion and increase safe, active and sustainable transportation to and from school.
- This project will directly support the Sustainability, Mobility, Safety, Health and Social Equity goals of this grant program.

STUDY TASKS**1. Project Initiation****Task 1.1 Project Kick-Off Meeting**

- The City of Salinas Public Works, TAMC, Monterey County Health Department (MCHD) and Ecology Action will hold a kick-off meeting with Caltrans staff to discuss grant procedures and project expectations including invoicing, quarterly reporting, and all other relevant project information. Meeting summary will be documented.
- Responsible Parties: City of Salinas, TAMC, Monterey County Health Department (MCHD), and Ecology Action (EA).

Task 1.2 RFP for Consultant Services

- Complete a competitive Request for Proposals process for selection of a technical consultant familiar with transportation planning at schools and with innovative ideas for multimodal improvements around schools using proper procurement procedures.
- Responsible Parties: Ecology Action and TAMC

Task 1.3 Contact School Sites

- Contact all school sites with projected timeline for their individual involvement and participation levels.
- Responsible Party: Ecology Action

Task 1.4 Staff Coordination

- Monthly team meetings with project partners to ensure good communication on upcoming tasks, project progress, schedule and budget. Caltrans staff will be invited to participate in project team meetings.
- Responsible Parties: Ecology Action, TAMC, MCHD, City of Salinas

Task	Deliverable
1.1	<i>Meeting Notes</i>
1.2	<i>Consultant Contract</i>
1.3	<i>Log of Contacts</i>
1.4	<i>Log of Meetings</i>

2. Community Engagement

Task 2.1 Devise Engagement Strategy

- Devise an engagement strategy describing the process and opportunities for public input from the school community as well as surrounding neighborhoods.
- Responsible Parties: Monterey County Health Department, City of Salinas, TAMC and Ecology Action

Task 2.2 Create collateral

- Create poster to promote meetings
- Create/maintain website to promote planning process
- Create sign-in sheets for meetings
- Create sign-up sheets for upcoming audits
- Create sign-in sheets for audits
- Responsible Party: Ecology Action

Task 2.3 Conduct Outreach

- Conduct intentional bilingual outreach to engage the community and stakeholders throughout the planning process.
- Attend school parent group meetings, work through community-based organizations and existing groups to invite participants
- Work with the City of Salinas to coordinate outreach opportunities with other City planning efforts
- Contact key stakeholders such as the School District, Student Leadership, Migrant Education Services and Leadership and Civic Engagement Academy (enLACE) and develop a communications infrastructure to promote the process.

- The major focus is to generate good participation at 6-8 public meetings, site audits at 44 schools and receive input through other provided methods.

Promotion methods include:

- ✓ social media, including Facebook posts
- ✓ school newsletters
- ✓ PTA announcements
- ✓ press releases
- ✓ distribution of flier
- ✓ promotion through grassroots channels
- ✓ Back to School nights
- ✓ Community Based Organization partnerships
- ✓ In-person meetings
- All materials will be posted in Spanish and English, plus visuals to accommodate low literacy individuals
- Responsible Party: MCHD

Task 2.4 Online Community Engagement

- Create bilingual website with project information, updates, and opportunities for the public to post comments regarding active transportation conditions around school sites. All meetings and audits will be posted on the site. Site to be promoted at all schools.
- Target parents and community members who are unable to attend in-person presentations by providing an interactive online forum.
- Responsible Party: Ecology Action

Task 2.5 Map Student Residence Data and Create Individual School Site Maps

- Collect student residence information from the four named school districts. Plot residence information on map/overlay of each school site showing attendance boundaries, school locations and walking and biking distance radii to better inform walking audits.
- Create two discreet maps for each of the 44 school sites. Print out sufficient copies for all audits and public meetings.
- Responsible Parties: Ecology Action and TAMC

Task 2.6 Create On-Site Public Comment Boards

- Create an interactive board with school-specific map to be placed in each school office to solicit public comments. Maps will be displayed at every school site for an additional method to collect public comment.
- Responsible Parties: Ecology Action, MCHD and TAMC

Task 2.7 Community Workshops

- Convene 6-8 public meetings bringing school administrators, parents, students, planners, interested school community members and neighbors together to describe upcoming process and solicit input and volunteers to act as stakeholders for each school and to participate in audits at site.
- Community workshops shall be conducted in the appropriate language given community neighborhood needs, with interpreters available as needed. Meetings will offer dual language capacity including some presentations in Spanish with English translation.
- Provide food and childcare at all meetings (paid for with local funds separate from the grant or matching funds).
- Responsible Parties: City of Salinas, TAMC, MCHD, Ecology Action and Consultant

Task	Deliverable
2.1	<i>List of stakeholders, meetings</i>
2.2	<i>Sample Collateral</i>
2.3	<i>Screenshot of interface</i>
2.4	<i>Screenshot and comments from online forum</i>
2.5	<i>Residence Maps</i>
2.6	<i>Interactive Board Display</i>
2.7	<i>Public meeting notes & Volunteer list</i>

3. Background Information & Data Collection

Task 3.1 Collect & Review Background Information

- Collect and review policy, planning and engineering documents relevant to safe routes to school to provide understanding of planned infrastructure improvement projects, policy barriers and opportunities and upcoming infrastructure projects. The background review will help ensure consistency with existing City planning documents.
- Responsible Party: TAMC, Ecology Action and City of Salinas

Task 3.2 Conduct Parent Surveys

- Conduct English/Spanish National Safe Routes to School parent surveys at each school site before audit is scheduled. Surveys collect parent attitudes regarding student transportation and perceived barriers to walking/biking.
- Responsible Party: Ecology Action, MCHD

Task 3.3 Conduct Student Travel Mode Surveys

- Conduct National Safe Routes to School student travel mode surveys at each school for 2-day period.
- Responsible Party: Ecology Action

Task 3.4 Crash Data Collection and Analysis for Schools

- Gather and analyze crash data for each site from the UC Berkeley TIMS maps as well as SWITRS. Additionally, solicit non-reported incidents at each site that would not appear in SWITRS data sets from public meetings, comments and other sources.
- Responsible Party: TAMC and Ecology Action

Task	Deliverable
<i>3.1</i>	<i>Collect & Review Background Information</i>
<i>3.2</i>	<i>Survey Results</i>
<i>3.3</i>	<i>Mode Results</i>
<i>3.4</i>	<i>Crash Data & Data Analysis</i>

4. School Audits

Task 4.1 Solicit Audit Participants

- Reach out through advocacy groups, school community, neighborhood outreach, online portal, and public meetings to solicit variety of stakeholders to participate in an audit at the 44 school sites (Task 2.7). Participants will vary depending on site but may include school administrators, parents, students, community members, and other stakeholders.
- Responsible Parties: Ecology Action, Monterey County Health Department

Task 4.2 Online Interactive Map and Forum

- Encourage stakeholders who are unable to attend the walking audits to provide input through the interactive online map and forum provided on the project website.
- Responsible Parties: TAMC and Ecology Action

Task 4.3 Conduct School Audits

- Conduct walking audit of areas surrounding schools. Survey popular routes to school and drop-off/pick-up areas when students are arriving on campus. Survey bike parking and other existing support facilities. Assess non-infrastructure programming. Photograph problem areas.
- Responsible Parties: City of Salinas, TAMC, Monterey County Health Department, Ecology Action and Consultant (on some audits but not all)

Task 4.4 Consolidate Audit Findings

- Consolidate findings from the audits, public forums and online sources.
- Responsible Party: Ecology Action

Task 4.5 Make Non-Infrastructure Recommendations

- Consider non-infrastructure education and encouragement programming for school site based on stakeholder feedback.
- Develop a draft program list.
- Responsible Parties: Ecology Action, MCHD, City of Salinas, School Reps and TAMC, Consultant

Task 4.6 Make Infrastructure Recommendations

- Compile a list of Infrastructure and Non-Infrastructure recommendations for each school site. Develop a draft project list.
- Responsible Party: Consultant

Task 4.7 Internal Review Recommendations List

- Have all partner agencies review and revise recommendations before including in presentations.
- Responsible Party: Ecology Action, Consultant, City of Salinas, TAMC and MCHD

Task 4.8 Create Presentation

- Create a Powerpoint presentation to share findings with decision-making bodies and poster boards depicting draft recommended improvements to be displayed at each school and at community events
- Responsible Party: Ecology Action, MCHD

Task 4.9 Present findings to Stakeholders

- Present draft recommendations to decision-making bodies (school boards, Salinas Traffic and Transportation Commission, Salinas Planning Commission, Salinas City Council and TAMC Board) and solicit input.
- Present recommendations on poster boards and solicit feedback from the community through community gatherings and pop-up events, online portal, and school newsletter.
- Responsible Party: City of Salinas, TAMC, Monterey County Health Department and Ecology Action

Task 4.10 Revise Draft Recommendation List

- Revise Draft Recommendation List based on stakeholder input.
- Responsible Party: Ecology Action

Task	Deliverable
4.1	<i>Participant List</i>
4.2	<i>Summary map and comments from the online forum</i>
4.3	<i>Notes and photos from Audit</i>
4.4	<i>Barrier List for Each School</i>
4.5	<i>Draft Non-Infrastructure Recommendations List</i>
4.6	<i>Draft Infrastructure Recommendations List</i>
4.7	<i>Compiled Recommendations List</i>
4.8	<i>Poster Board Displays & Powerpoint presentation</i>
4.9	<i>Photos of displays; meeting minutes and agendas</i>
4.10	<i>Revise Draft Recommendation List</i>

5. Pop-Up Infrastructure Demonstrations

Task 5.1 Select Demonstration Sites

- Identify 2-4 locations for pop-up demonstration events. Demonstration locations will be chosen based on geographic/school district distribution, potential public participation, opportunities to demonstrate infrastructure that may be unfamiliar to public, and sites that could be converted to permanent installations.

- Responsible Party: City of Salinas, TAMC, Monterey County Health Department and Ecology Action

Task 5.2 Designs and Permits for Demonstration

- Develop drawings for pop-up demonstration infrastructure including proposed locations of temporary striping, hardscape items such as planter boxes, and signage. Develop detailed materials list/budget. Team will work with local agency staff on any necessary permitting (e.g. encroachment permit) including expected traffic control needs.
- Develop a detailed sign plan, illustrating set-up of demonstration infrastructure, and educational signage indicating changed traffic or parking conditions as part of the demonstration.
- Develop concept drawings and visual displays to help explain the project to the community the during the pop-up event.
- Responsible Party: TAMC, Ecology Action, Consultant and City of Salinas,

Task 5.3 Community Notification & Engagement

- Coordinate with school community to establish pop-up dates and invite participation.
- Recruit volunteers to help install the pop-up demonstrations.
- Develop and distribute flyers and social media blasts (in English and Spanish) to notify and inform businesses, schools, and the greater community of upcoming pop-up demonstrations.
- Responsible Parties: Ecology Action, TAMC and MCHD

Task 5.4 Install and Implement Demonstrations

- Event implementation will include event preparation, set-up and demonstration treatment installation prior to the event going live. Outreach to businesses or residents adjacent to the demonstration site; setup may need to occur the day prior to the event depending on scope.
- Once the demonstration is active, provide staff and volunteer management, education of public participants, documentation and evaluation activities (see next task), and fielding inquiries from media and public.
- Educate the public and get feedback about the infrastructure pop-up via a project information center with project information and maps, and opportunities for feedback.
- Responsible Parties: Ecology Action, TAMC and MCHD

Task 5.5 Demonstration Evaluation

- Documentation and evaluation plan will include a survey form and survey implementation actions, overall master plan feedback opportunities (Maps and other information at the pop-up tent), photography and a list of metrics to be evaluated after the demonstration.
- Responsible Party: Ecology Action

Task	Deliverable
5.1	<i>Maps of demonstration site locations</i>
5.2	<i>Drawings, materials list and cost, permits and sign plan</i>
5.3	<i>Informational flyers, social media posts and volunteer recruitment list.</i>
5.4	<i>Pictures of pop-up demonstrations, notes, and community surveys.</i>
5.5	<i>Summary of pop-up demonstration events</i>

6. Plan Development

Task 6.1 Develop Profile for each School

- Create a succinct profile for each school site detailing current conditions (portrait of student body, student residence maps and relevant school policies and programs). Describe current challenges and opportunities at individual sites and recommend infrastructure and non-infrastructure solutions.
- Review identified infrastructure needs and develop list of potential infrastructure solutions will be developed for each school.
- Include all data collected for each site (site audit, parent surveys, mode surveys, public comments, crash data and community input).
- School Profiles will be written in Spanish and English.
- Responsible Parties: Ecology Action; review by City of Salinas, TAMC, MCHD

Task 6.2 Develop Project Rating System

- Develop rating mechanism using criteria consistent with the California Active Transportation Program, Regional Transportation Plan and City General Plan to identify high priority projects that will help meet local, regional and state health and safety goals.
- Responsible Parties: Ecology Action and Consultant

Task 6.3 Develop Plan Implementation Strategy

- Create a phased implementation strategy that includes a timeline, planning-level cost estimates and potential funding sources.
- Include a strategy to pilot a school carpool program in Salinas
- Responsible Party: Ecology Action, Consultant, City of Salinas, TAMC and MCHD

Task 6.4 Create Infrastructure Recommendation Maps

- Create maps for each school showing recommended sites for infrastructure improvements, and proposed phasing.
- Responsible Party: Ecology Action

Task 6.5 Develop & Review Administrative Draft Plan

- Compile all the data and recommendations prepared for the plan (including school profiles, background data, community engagement strategy and outcomes, maps, concept drawings, infrastructure and non-infrastructure recommendations, ratings matrix and implementation strategy) into a single plan, including a short Executive Summary.
- Circulate to the administrative draft to TAMC, MCHD, School District, and City staff for review and comment.
- Responsible Party: Ecology Action, Consultant, TAMC, MCHD and City of Salinas

Task 6.6 Draft Plan

- Revise Administrative Draft Plan incorporating comments from TAMC, MCHD, School District and City.
- Prepare an online version of the draft plan.
- Responsible Party: Ecology Action and/or Consultant

Task 6.7 Draft Plan Review

- Post the Draft Plan online and distribute copies to community centers, public libraries, schools, City of Salinas for public review and input.
- Solicit comments on the Draft Plan from the following:
 - Salinas Traffic and Transportation Commission, Planning Commission and City Council
 - the four affected school boards
 - TAMC Board
 - Members of the public, including parents
- Responsible Party: Ecology Action, MCHD, City of Salinas, and TAMC

Task 6.8 Revise Draft Plan

- Revise Draft Plan incorporating comments from the community and advisory bodies.
- Responsible Party: City of Salinas Public Works, TAMC, MCHD and Ecology Action

Task 6.9 Plan Adoption

- Revise Draft Plan incorporating input from the community and advisory bodies.
- Present final plan to the Salinas City Council, 4 School District Boards and TAMC Board. Resolve any critical issues.
- The TAMC Board, School District Boards and the City of Salinas will adopt final Salinas Safe Routes to School Plan.
- Once adopted, provide ten hard-copies and one electronic copy of the final report to TAMC, for distribution to the City of Salinas. Credit to Caltrans and other financial contributors must be listed on the cover of the report.
- Responsible Party: City of Salinas, TAMC, MCHD and Ecology Action

Task 6.10 Project Implementation

- Create press release for plan release.
- Distribute copies of plan to the Public Library, the School Districts, City of Salinas Public Works, TAMC, MCHD, Consultant and Ecology Action. Project recommendations and all research will be available for use in upcoming funding proposals, most notably the Active Transportation Program Cycle 6 submission and future state/federal applications.
- Responsible Party: City of Salinas, TAMC, MCHD and Ecology Action

Task	Deliverable
6.1	<i>Draft School Profiles</i>
6.2	<i>Rating matrix</i>
6.3	<i>Draft Implementation Strategy</i>
6.4	<i>46 Maps</i>
6.5	<i>Administrative Draft Plan</i>
6.6	<i>Draft Plan, including online version</i>
6.7	<i>PowerPoint Presentation & Meeting Summaries</i>
6.8	<i>Draft Final Plan</i>
6.9	<i>Adopted Final Plan, including online version and 10 paper copies</i>
6.10	<i>Press Release</i>

7. Fiscal Management

Task 7.1: Invoicing

- Prepare monthly invoices according to the TAMC format, with all Caltrans-required back up documentation (Ecology Action, MCHD, Salinas, and Consultant).
- Submit complete invoice packages to Caltrans District staff based on milestone completion—at least quarterly, but no more frequently than monthly. (TAMC)
- Responsible Parties: Ecology Action, MCHD, Consultant and TAMC

Task 7.2: Quarterly Reports

- Monitor project progress, prepare and submit quarterly reports to Caltrans District staff providing a summary of project progress and grant/local match expenditures.
- Responsible Parties: TAMC & Ecology Action

Task	Deliverable
<i>7.1</i>	<i>Invoices and back up documentation</i>
<i>7.2</i>	<i>Quarterly Reports</i>