

## SCOPE OF WORK

### TASK 1: PROJECT MANAGEMENT

The purpose of this task is to ensure Mobility Zones is centered in efficient project management, clear and consistent communication, effective collaboration across multiple organizations, and shared quality control and risk mitigation principles.

#### Task 1.1 Project Administration

##### PROJECT KICK-OFF MEETING

We will schedule a Project Kick-Off Meeting to be attended by representatives from the Steer team, SACOG, and Civic Thread. We expect that this meeting will allow us to:

- Finalize our scope of work;
- Finalize our schedule;
- Define a project management meeting and invoicing/reporting schedule, as well as deliverable review timelines and procedures;
- Discuss collaborative arrangements including data sharing and communication protocols; and
- Identify and discuss risks.

##### ADMINISTRATION

We will provide a finalized Work Plan and Schedule, outlining potential project risks and mitigations, and defining our QA/QC, invoicing, and reporting procedures.

#### Task 1.2 Project Management Meetings

We will hold standing biweekly check-in meetings with the SACOG and Civic Thread Project Management Team (PMT).

##### TASK 1 DELIVERABLES

- Final scope of work and schedule
- Monthly invoices
- Project meeting agendas and notes

### TASK 2: PROJECT GOAL SETTING AND CRITERIA DEVELOPMENT

The purpose of this task is to set a clear vision, goals, and branding for the execution of the project (Task 2.1); supported by carefully framed, collected, and visualized datasets and evaluation methods (Task 2.2); co-created with stakeholders and communities (Task 2.3).

#### Task 2.1 Establish Goals, Vision and Branding

The objective of Task 2.1 is to develop a vision and goals for the project and branding templates for use throughout the project duration.

##### ESTABLISHING A VISION AND GOALS

1. *Build upon existing SACOG work and thought process.*

2. *Supplement with review of existing plans and programs.*
3. *Bring initial concept to PMT, Task Force and Committees for review and revision.*
4. *Finalize in coordination with PMT and Task Force.*

##### DEVELOPING BRANDING, LOGOS AND TEMPLATES

1. *Collect stakeholder inputs.*
2. *Develop creative brief outlining initial project objectives, target audience, key messages, and visual identity preferences.*
3. *Develop initial branding concept.*
4. *Design Templates for agendas, reports, and PowerPoint slides.*

#### Task 2.2 Develop Criteria for Mobility Zones

The objective of Task 2.2 is to identify and document evaluation criteria and initial methods for defining Mobility Zones and assessing the needs and opportunities of each zone.

##### DATA COLLECTION

1. *Identify and collect initial criteria from SACOG and partners.*
2. *Summarize vision and goal framing with criteria for feedback and review.*
3. *Review with internal Subject Matter Experts.*
4. *Conduct Committee engagement.*
5. *Refine, clean, and finalize database.*

We will organize these spatial data for use

throughout the duration of the study in a GIS library, as we prepare analytical tools to support analysis.

## **ANALYTICAL AND VISUALIZATION TOOLS**

We will create tailored interactive GIS platforms. We will define access controls, level of collaboration, feedback options, and duration of engagement among other characteristics.

### **Task 2.3 Committee, Task Force and Community Engagement**

#### **OVERALL ENGAGEMENT APPROACH**

We will co-create key project elements through:

1. *Advisory Committees.*
2. *Project Task Force.*
3. *Community Engagement.*

We will develop agendas, minutes, materials, action items and follow up tasks. We will also work with Civic Thread and SACOG on the development and distribution of social media, web, and print content.

We will work with the PMT to refine these touchpoints and prepare all necessary inputs in coordination with Civic Thread.

#### **TASK 2 DELIVERABLES**

- Project goals and vision documentation

- Project logo and branding guide
- Templates for meeting agendas, reports and PowerPoint slides
- Mobility Zones Criteria datasets
- Mobility Zones Criteria technical document

## **TASK 3: ZONE ESTABLISHMENT AND CONDITIONS SCAN**

Task 3 involves the establishment of Mobility Zones (3.1), the screening of zone-specific needs and opportunities (3.2), and community and stakeholder engagement (3.3).

### **Task 3.1 Identify Boundaries for Mobility Zones**

We will identify the areas of the SACOG region with the greatest mobility need, clearly communicate these findings to stakeholders, and design and deploy a process to limit the zones to key areas of need in each county. We will coordinate with stakeholders to ensure buy-in methodically and be careful to consider the needs of suburban and rural areas in addition to locations within the region's urban core.

#### **IDENTIFYING EQUITY PRIORITY COMMUNITIES (EPC'S)**

We will perform analysis to identify areas of greatest need across the region.

1. *Summarize regional equity efforts.*
2. *Propose initial equity priority designation that correlates mobility needs with systemically marginalized demographic criteria.*
3. *Present initial concepts and solicit feedback.*

The result will be a map of communities of need that serves as a starting point for defining Mobility Zone boundaries.

#### **DEFINING MOBILITY ZONE BOUNDARIES**

We will then define Mobility Zone boundaries using GIS analysis to overlay EPCs with additional project criteria such as land use characteristics and travel patterns.

1. *Learn from GreenZones experience.*
2. *Geographic screen of neighborhood boundaries and land use typologies.*
3. *Screen by needs criteria to refine zones.*
4. *Refine criteria and develop methods.*
5. *Committee and community workshops.*
6. *Draft and final boundaries.*

The result of this effort will be a GIS layer of each Mobility Zone.

### **Task 3.2 Opportunities and Constraints Screening**

Based on our preliminary assessment, we will develop a profile of the needs and mobility opportunities of each Zone.

**NEEDS IDENTIFICATION**

We will coordinate with the PMT and Task Force to confirm preliminary needs and identify additional mobility priorities. Needs identification criteria might include:

- *Safety & Health.*
- *Access & Connectivity.*
- *Livability & Quality of Life.*

**OPPORTUNITIES IDENTIFICATION**

We will also consider how future growth and SACOG and partner agency plans and programs might impact the landscape of Mobility Zones and suggest potential high-value solutions. This work will draw on growth forecasts, planned development, and proposed planning focus areas (e.g., Green Zones, High-Capacity Transit Network, Regional Trails Network).

We will layer this data in our GIS library and align needs identification methods to include planned and future growth and infrastructure.

**INCORPORATING LIVED EXPERIENCE**

Using our GIS visualization tools, we will engage with advisory committees and Mobility Zone communities to ground-truth preliminary findings and solicit direct input on the needs affecting each Zone. We will document these in our interactive database.

**TECHNICAL DOCUMENT**

The result of this effort will be a technical document that describes analytical methods tied to program goals, summarizes the input of communities and stakeholders, and presents a profile of each Zone's unique needs and opportunities.

We will summarize these results in our interactive GIS platform.

**Task 3.3 Committee, Task Force and Community Engagement**

We expect our engagement around Task 3 to include the standardized touchpoints. We have also budgeted for **one day of walk audits per county** to explore MZs with community leaders and inform the needs and opportunities identification.

**TASK 3 DELIVERABLES**

- Mobility Zones boundaries geospatial dataset
- Opportunities and Constraints technical document
- Participation in meetings
- Meeting material support

**TASK 4: PROJECT DEVELOPMENT AND PRIORITIZATION**

The purpose of this task is to identify and

prioritize projects in each zone that can best deliver on the goals for accessible, clean, shared, and active transportation infrastructure and address barriers related to safety, accessibility and connectivity, and livability.

**Task 4.1 Identify Project Concepts**

The purpose of this subtask is to identify a longlist of eligible strategies for each Mobility Zone. We will incorporate other planned or proposed solutions that might further the goals and address the needs and opportunities of each Zone.

**ASSEMBLING INITIAL PROJECT CONCEPTS**

We will aim to identify at least three potential solutions for each Mobility Zone. We will focus where possible on concepts best eligible for early action, collecting initial candidate projects from two primary sources, a document review and subject matter expertise.

**IDENTIFYING NEW CONCEPTS WITH COMMUNITIES**

We will work with community members to identify other potential concepts to address underlying needs.

**Task 4.2 Project Prioritization**

The goal of this task is to design and implement a transparent, accessible prioritization framework tailored to local contexts, and applying a funding and deliverability screen.

## REGIONAL PRIORITIZATION FRAMEWORK

We will establish a preliminary Mobility Zones prioritization framework tied to the vision and goals, and leveraging the criteria collected in prior tasks.

## FLEXIBLE LOCAL APPLICATION

We will apply a prioritization tool that brings in metrics obtained from previous analysis as well as variables such as high-level cost estimates, potential funding sources, estimated level of effort or timelines to implementation, proven effectiveness, and community support.

## FUNDING AND DELIVERABILITY SCREEN

We will perform a concurrent funding availability and deliverability screen to ensure high performing projects are eligible for implementation funding and clear of any regulatory, political, or institutional barriers to early action.

We will identify projects that can be bundled across the region for efficiency or competitiveness.

## Task 4.3 Committee, Task Force and Community Engagement

The project team will provide Civic Thread with the materials and resources to explain project concepts, to discuss project prioritization criteria and potential impacts, and to build localized consensus. We will collaborate with Civic Thread to host **community charettes or other such interactive workshops** that enable

community members to co-design solutions.

We will provide interactive engagement tools for the project prioritization process.

Committee, Task Force, and Community Engagement for Task 4 will focus on:

- Identifying projects in each Mobility Zone.
- Developing prioritization criteria.
- Developing weightings for prioritization criteria.
- Providing additional information to inform the evaluation.
- Reviewing the prioritized project lists and identifying Early Action projects.

### TASK 4 DELIVERABLES

- Mobility Zone presentations
- Prioritized list of projects
- Participation in meetings
- Meeting material support

## TASK 5: ADVANCE PRIORITY PROJECTS

We will support the Early Action project development being conducted by Civic Lab and to develop implementation toolkits for non-Early Action projects in each Mobility Zone.

## Task 5.1 Early Action Project Civic Lab

We will support Civic Lab in advancing the prioritized Early Action Projects by attending and participating in meetings to discuss project development and reporting on project progress. It may also include providing supporting information, case studies, templates, and other materials to inform these projects. We will support the project development process by providing resources and making connections. This could include:

- Helping to identify project development participants from the public, private, and non-profit sectors.
- Providing example work plans for similar pilot projects.
- Reviewing and refining the project workplan and mapping out a schedule with key milestones for each project.
- Providing resources for the specific project, including case study examples and best practice research, example policies, procurement language, equitable engagement strategies, marketing and social media plans, and other implementation resources.
- Identifying and making connections and introductions to potential expert panelists, peer agency staff, and decision-makers.
- Developing technology showcases and making connections to mobility

vendors and other private sector partners that could play a role in project implementation.

We will attend and participate in project development meetings and at key milestones develop summaries that can be used to report on project progress. We will use the summaries to report back to the committees on project progress.

### **Task 5.2 Implementation Toolkits**

Based on information learned in Task 5.1, our team will create a project-specific toolkit which will include the following tools:

- **Fact Sheet**
- **Grant and Funding Outlook**
- **Project Controls**
- **An Implementation Action Plan**
  - Additional planning, design or engineering needs
  - Ongoing stakeholder and community engagement needs
  - Opportunities for capacity building and community involvement in delivery
  - Identification of permits, policies or other regulation that may require refinement
  - Identification of opportunities for regional coordination and resource development

### **Task 5.3 Committee, Task Force and Community Engagement**

Once Early Action Projects have been identified, it will be critical to workshop them with community. We will also focus on any regional or local jurisdictional needs to advance Early Action Project implementation.

We will co-create the Implementation Toolkits with both Community and Municipal Advisory Committee.

<b>TASK 5 DELIVERABLES</b>
<ul style="list-style-type: none"> <li>• Early Action Project presentation</li> <li>• Early Action Project supportive material</li> <li>• Implementation Toolkits</li> <li>• Participation in meetings</li> <li>• Meeting material support</li> </ul>