Metro First Last Mile
Statement of Work

Revised July 5th 2012- Revised sections highlighted in yellow.

Task 1: Project Management
Purpose

The purpose of Project Management is to ensure the communication of clearly articulated project goals to all participants, mobilize project resources, monitor schedule and deliverables, and to maintain clear and regular communication with Metro staff.

1.1 Kick-off Meeting

Upon receipt of Notice to Proceed (NTP) IBI Group will coordinate a kick-off meeting with Metro and SCAG staff including key team members from IBI Group, Melendrez and Alta, to discuss project goals, schedule, communication protocols and administrative tasks associated with completing the work.

Deliverables: Meeting agenda, sign-in sheet and meeting notes delivered electronically to meeting participants within 3 working days of meeting date.

1.2 Project Status Meetings

IBI Group will lead monthly Project Status Meetings in order to review overall progress, plan for upcoming work and resolve any challenges that may arise. To support this intent, we propose to hold these meetings at the beginning of each month, and to generate a *Monthly Status Report* for co-review. This will help streamline the reporting process, and will consolidate understanding around progress towards completing goals.

IBI Group will lead up to ten (10) Project Status Meetings. Alta and Meléndrez will attend select Status Meetings as required.

Deliverables: Meeting agendas, sign-in sheets and meeting notes delivered electronically to meeting participants within 3 working days of meeting date. Presentation content and technical material required to facilitate meeting intent(s).

1.3 Project Management Plan

The Project Management Plan (PMP) is intended to serve as a quick management reference to the project management team, task leads, and Metro. The PMP will include project reference material including the approved Statement of Work, Project Schedule by work task, staffing plan by task, approved budgets by task, contact information, document templates, invoicing instructions and

deliverable review and approval process. The project schedule will note all tasks, dates, milestones, meeting dates and will be updated and reviewed at each Status Meeting. The schedule will also serve as an overall workflow chart and will identify critical work path items. The PMP will be prepared and delivered in a three ring binder in addition to electronic format, so that revised content (i.e. contact list, schedule) can be easily added as the project proceeds.

Deliverables: Project Management Plan, including project costs, staffing plan, and schedule with deliverable dates, review periods and project status meetings.

1.4 Monthly Invoice

The purpose of monthly project report and invoice is to note progress against projected efforts and allow timely payment of prime and sub-contractors consistent with efforts expended and progress achieved. Each Project Status Report will cover the first to last day of each month that the project is ongoing; as defined in the Prime Contract. The progress report will contain the following components:

1. Executive summary
2. Description of the tasks/deliverables completed
3. Progress narrative and comparison to the budgeted hours
4. Management issues, including status, resolution and action items
5. Project task schedule describing percentages of completeness of each task
6. Schedule and schedule tracking narrative
7. List of deliverable items and form of delivery (i.e., DCL number)
8. Dollar amount for which payment is requested

Deliverables: Monthly Project Status Report to be submitted first week of each month with Invoice covering prior months work efforts. Physical and digital copies will be provided.

Task 2: Technical Advisory Committee

Purpose

The First Last Mile Strategic Plan will include strategies and guidelines supportive of active access to transportation networks, and as such will help guide public and private investment efforts beyond the jurisdiction of any one public agency. For this reason, a Technical Advisory Committee (TAC) composed of representatives from relevant Metro departments and programs, SCAG, municipal planning and transportation departments, and municipal transit providers, and stakeholder groups, as defined by the client, will be formed. The TAC will be formulated to insure all modes of transportation and view points are well considered in the process. The TAC will review project activities and inform project efforts with the unique viewpoint, expertise and considerations of their respective group or agency. As necessary, mode-specific working groups will be formed to address specific technical issues or provide topical guidance.

2.1 Establish Technical Advisory Committee (TAC)

The IBI Group team will work with Metro to establish both a core group TAC formed of internal Metro staff and a Partners TAC, inclusive of Partner Jurisdictions.

Metro TAC - Comprised of Metro decision makers that can provide clarity and direction on Metro's role in shaping the broader public realm, which in turn will help clarify coordination efforts with other public agencies.

Partners TAC – Comprised of the leaders and decision makers who collectively share jurisdictional control over the public realm, including local agency and stakeholder representatives related to bicycle and pedestrian projects. Stakeholders from the regional government (SCAG), County agencies, affected Municipal Departments of Planning, Transportation and Transit, and other Public representatives from around the County will be considered.

The establishment of the TAC will occur at the very beginning of the project and will be an agenda item at the Kick-Off Meeting. Some or all members of the Metro TAC may also be included in the broader Partners TAC – so the first may be seen as a core group – or committee within a committee. The TAC participant list will be developed based on Metro provided stakeholder lists. IBI Group and Sub-consultants will review list(s) and provide suggestions for TAC inclusion.

Deliverables: List of Participants and TAC Structure, Invitation Letter

2.2 TAC Meeting Coordination

Up to 4 Partners TAC meetings will be held throughout the project. It is assumed a Metro core group TAC meeting can be conducted at one of the early Monthly Status Meetings. This meeting will be conducted to provide clarity regarding Partner Agencies to include in the full or Partners TAC and to review and refine draft agenda for those meetings.

Given the cross-departmental coordination that the implementation of this First-Last mile vision will require (internal coordination within Metro departments and external coordination between Metro and regional and local municipalities) one of the preliminary TAC meetings may include a consensus-building workshop that will focus on identifying obstacles and opportunities.

The draft agenda topics for the four Partner TAC Meetings include:

Partners TAC Meeting #1

- Project Goals / Approach and Schedule
- Existing guiding policy agency by agency as relating to project brief
- Existing design guidelines, opportunities and obstacles
- Potential improvements and amenities

Partners TAC Meeting #2

- Review demarcation of active transit zones
- Review potential coordination/implementation strategies
- Findings from our team's demographic and transit demand research

Partners TAC Meeting #3

- Present Case Study Analysis
- best practices in connectivity and access planning
- Gather Feedback

Partners TAC Meeting #4

- Present Draft Strategies
- Present Draft Guidelines
- Funding opportunities

Deliverables: Coordination of up to 4 TAC meetings including provision of Meeting Agendas, Sign In Sheet, Meeting Notes, and meeting presentation material (printed and projected as required)

Task 3: System Access Research & Analysis

Purpose

The intent of this task is to synthesize findings from various sources including the 2012 RTP/SCS, the 2010 US Census, the Transportation Research Board, the Transportation Research Journal, and the US DOT Research and Innovative Technology Administration.

3.1 Review 2012 RTP/SCS

The Sustainable Community Strategy (SCS) is a land use strategy required as part of the 25 year Regional Transportation Plan (RTP). The SCS brings an explicit link between land use policy and transportation investments and includes four building blocks; (1) Land Use, (2) Transportation Networks, (3) Transportation Demand Management Strategies, and (4) Transportation System Management Programs and Policies. IBI Group will review the four building blocks of the 2012 Metro RTP/SCS to identify factors affecting travel behavior, such as travel demand and mode split, to inform LA Metro Policy on modal access targets. We will also consider other factors that will contribute to transit demand and access patterns, such as: demographic changes, fuel prices, and technological advancements, etc.

Additional key documents that will be included in this review will be the Metro Long Range Transportation Plan (LRTP), Short Range Transit Plan (SRTP) and the Countywide Sustainability Planning Policy. The document will provide details on near and long term projects planned my Metro. The Sustainability Policy and it s associated Accessibility Index and Accessibility Clusters could help to provide a baseline for this first-final mile analysis by assisting in defining station

area types and selecting the 10 candidate case study stations. This policy, its findings, and background information will be a key document reviewed in this task.

Deliverables: Technical Memorandum summarizing findings focusing on factors that contribute to non-motorized access to transit facilities

3.2 Review Metro's Origin-Destination Surveys

In order to determine the transportation needs and appropriate solutions for an area, it is important to have an understanding of the underlying characteristics of travel. IBI Group will review Recent Origin-Destination Survey results to understand transit user travel patterns to and from transit stations. Geographic Information Systems (GIS) techniques will be employed to assist the analysis. At this stage, the GOS analysis will be used at a high level to understand the primary origin and destination areas and distances of travel for bicyclists and pedestrians. This information will assist in defining the potential area of influence or improvement that would be identified in subsequent tasks.

Deliverables: Technical memorandum summarizing methodology and findings

3.3 Transit Access – Opportunities and Constraints

Building on the 2012 RTP/SCS, IBI Group will lead an analysis of opportunities and constraints with respect to accessing transit in 5, 10 and 30 years. There are a number of potential and anticipated future changes that will affect transit demand patterns beyond access efficiency, including alternative transportation costs, development patterns, work composition, lifestyle choices and perhaps most importantly, demographics. Our first step in this task will be to break down the mobility choices into finer grain categories, with the intention to better understand the wide range of current mobility choices, and review the different functional and spatial needs.

For example, "Bicycle" as a single category is an insufficient description. As an example; confident cyclists are comfortable riding in mixed flow vehicular traffic while a family with young children are more likely to seek fully separated bike facilities. The pedestrian example is equally striking as an young healthy individual has very different spatial and physical requirements as compared with an ambulatory individual in a wheel-chair, yet both are currently considered "pedestrians". Where do people riding skateboards or push scooters fit in? What about individuals driving Neighborhood Electric Vehicles (NEVs)? Our time is marked by an explosion in the types of mobility devices used on city streets, and as the Baby Boomer's age, they will undoubtedly through sheer numbers and a track record of creative innovation, challenge the range and types of assisted mobility devices seen on sidewalks and streets.

As noted in Task 3.1, the Accessibility Index and Clusters established by Metro can serve as a good base for this analysis, and help to define the station types/categories that will be studied in Task 3.4. IBI Group will develop a prototypical Opportunity and Constraints analysis for transit facilities located in each of the five Accessibility Clusters identified in the 2012 Draft Metro

Countywide Sustainability Policy.The IBI Group team will conduct the Opportunities and Constraints analysis with a critical eye towards the full range of mobility types, linking each to spatial requirements, in order to fully understand current and future conditions.

Deliverables: Matrix of opportunities and constraints to addressing the Metro transit system over 5, 10, and 30 years, and technical memorandum including a current and future mode typology study to augment generalized typology used in contemporary planning models.

3.4 Case Studies

Case studies will form a rigorous testing ground for research questions and concepts and will be tied to the place typologies of Metro's Sustainable Communities Planning Framework (SCPF).

3.4.1 Select Case Study Sites

Case study locations will be selected for 10 sites, covering a range of SCPF identified typologies, as well as a range of geographic, demographic and physical challenges that will give the design and analysis team a full view of the potential opportunities and challenges in need of addressing. The IBI Group Team will:

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- Identify prototypical non-motorized access opportunities and challenges associated with each of the five clusters based on previous bicycle and pedestrian access plans and analysis conducted by team members on past projects.
- Utilize the information obtained through the opportunities and constraints analysis and SCPF Accessibility Clusters. We anticipate that this study would be best informed if at least one station from each of the five cluster types are included as a case study.
- Incorporate input received from Metro staff and TAC members related to potential candidate case studies.
- Look for geographic diversity and station purpose diversity. Case study stations should be located throughout the county. We will also want to look at stations that primarily function as origin stations, those that serve destinations, and those that serve a mixture of trips.

The IBI Group team is adept at using a typological approach to station design, having developed a "TOD Building Block" approach for Orange Line Transit Oriented Development (TOD) and Gold Line Corridor TOD efforts as well as the Metro Station Design Project (2012). Our Meléndrez team members prepared Urban Design visioning for the Metro Westside Connection, leading efforts to conceptualize a set of station typologies and related urban design and station design guidelines for each typology.

Deliverables: Maps of proposed case study sites, including explanation for selection.

3.4.2 Develop a Set of Research/Evaluation Questions

Using the matrix of opportunities and constraints from Task 3.3, the IBI Group Team will create a set of evaluation criteria and questions that consider current and future access needs and opportunities at

each of the representative station/stop areas through the establishment of a set of Urban Design Indicators for the ultimate purpose of creating a survey tool.

Mainly qualitative, these indicators will act as performance measures for the station/stop sites. The Team will build upon our previous work on the Metro Station Design project, our recent work for SCAG, our various Gold Line projects, and our Mid City/Exposition Line work, in identifying the design elements that are most important for rider comfort and system function.

The Indicators will measure comfort and access, linkages to surrounding neighborhood, existence of under-utilized right-of-way or parcels, urban form, signage, and also regulatory context so that we can eventually determine best methods for implementation. We will be asking questions such as: how robust are existing rider amenities? How do people travel to and travel around the station/transit stop area? Where are people going and how are they using the transit? What opportunities and physical spaces are available for improved streetscape? Does the existing urban form support the transit? Where and how could connections be made to provide optimal access for all modes?

The IBI Group team will field survey each of the case study stations, as well as the identified surrounding catchment area for bicycle, pedestrian, and other active transportation modes. This survey will examine specific access routes to the station platforms, park-and-ride facilities, and transit transfer locations, as well as access routes along nearby streets and other public rights-of-way. This is a survey technique in which the design and planning team will observe the study sites for a defined period of time. In addition to documenting physical conditions in the environment that currently guide passenger movement (signage, circulation elements, bicycle access, etc.), the team will also be observing and documenting how people are moving to and from the stations themselves. The end result is a quantifiable data set that will allow the team to make assumptions about the current Metro transit environment.

Deliverables: Draft survey tool, final survey tool.

3.4.3 Conduct Case Study Analysis and Assemble Findings

The IBI Group Team will complete case study reviews for each of the 10 transit facilities. This process will include the field survey reviews by team staff identified in Task 3.4.2, followed by meetings with staff members from the local jurisdictions, as well as Metro's review of the field survey findings. The case study analysis will also include discussion of the station's function within the accessibility clusters, discussion of existing and planned land uses located in the vicinity of the station, and review and analysis of the existing transportation infrastructure, particular street types, presence and quality of sidewalks, types of bicycle facilities, and key active transportation trip generators and attractors located near the stations. Examples of these trip generators would include schools, senior centers/housing, and recreational facilities.

The IBI Group Team will also consider the growing range of mobility devices observed both in the Case Study surveys as well as through our broader experience, and consider the future use of such devices relative to demographic projections. The spatial requirements of identified mobility devices will be

documented. An analysis of how to incorporate the needs of such mobility devices into already documented best practices will be made so as to inform guidelines, that in turn will support active transportation across all age groups and user preferences.

The IBI Group team will then compile the information collected as part of the case studies to document existing conditions at each station and help to inform the analysis and policy development that will take place in Task 4.
Deliverables: Case study analysis presented in technical memorandum.

3.5 System Access and Analysis Report

The IBI Group team will prepare a draft and final System Access Report summarizing the work of Task 3. The intent of this report is to collect technical analysis prepared as part of this task for internal review, this is not intended for broader review requiring additional copy editing or intensive graphic production.

Deliverables: Draft report and final report of findings including powerpoint presentation.

Task 4: First – Last Mile Strategy

Based on the findings of preceding tasks, the IBI Group Team will assemble a First-Last Mile strategy. Contained in the strategy document will be modal access targets, an assembly of best-practices and design guidelines along with recommendations for next steps.

4.1 Modal Access Targets (5 & 10 Year)

Drawing upon the experience and expertise of the IBI Group team as well as county wide analysis efforts, case-study findings and feedback from the Technical Advisory Committee; recommendations for 5 and 10 year modal access targets will be prepared. The modal access targets will be calibrated for different categories of transit stations and stops and will respond to transit type (bus/rail) and place-type as described in Metro's Sustainable Communities Planning Framework (SCPF). As discussed with Metro, this task and analysis will utilize the TCRP predictive analytical tool as detailed in TCRP Report 153. IBI Group will take the base tool provided through the TCRP report and modify as necessary to fit with the parameters of this study effort. The tool and research completed by IBI Group in Task 3 will help to identify potential strategies that could increase active transportation modal access percentages and what potential magnitude of change in model access percentages would be anticipated as a result of the implementation of particular strategies within each station type.

Deliverables: Predictive Analytical tool modified to fit the analysis for this study and the results of the analysis summarized in a technical memorandum.

4.2 Best Practices Compilation & Review

As more jurisdictions and communities attempt to transition from auto dependent transportation and circulation systems to more sustainable active transportation modes, the availability of resources including complete street guidelines and design best-practice manuals have proliferated, yet best-practices are evolving quickly. The IBI Group team has been at the leading edge of this effort and has considerable resources both prepared for and gathered from cities, transit agencies and regional

governments. Our efforts will include consideration of APTA guidelines and standards, AIA Active Design Guidelines as well as the Los Angeles Design Manual for Living Streets, among other resources.

This task forms the research basis for the production of draft Design Guidelines (Task 4.3), which in turn may serve as a guiding document to many jurisdictions considering improvements in defined station areas throughout the County.

Deliverables: Technical memorandum summarizing research and potential relevance to the project.

4.3 Street Design Guidelines

Draft Street Design Guidelines will be prepared to support attainment of modal access targets for each category of transit stop or station identified in the plan. The Design Guide will address development of transportation facilities including roadways, sidewalks, bike facilities as well as station area improvements and infrastructure upgrades. The guidelines will:

- Identify access hierarchy at the transit facility and within the catchment areas.
- Describe key modal considerations
- Establish treatments for prioritizing (based on established hierarchy) and resolving conflicts between modes
- Provide recommendations for bicycle support facilities (short and long-term bicycle storage, maps, etc.) for the various station/stop categories
    - Update the Toolbox of Bicycle Facility Design Measures contained in the Bicycle Transportation Strategic Plan based on existing conditions and industry best practices and standards.
- Identify appropriate Low Impact Development Techniques for infrastructure Improvements
- Address other site specific considerations that might related to unique demographics or land uses
- Describe place-making opportunities and considerations

Deliverables: Draft and Final Street Design Guidelines.

4.4 Recommendations – Policies and Funding

Following a comprehensive review of existing Metro street, station and access policies, The IBI Group team will prepare recommendations appropriate to align station area design and programming with the new Street Design Guidelines and modal access targets. Our team will also identify actions that Metro and partner jurisdictions can undertake in pursuit of optimized transit access. Partnering strategies might include:

- Supporting partner jurisdictions in identifying grant opportunities
- Partnering in grant preparation,
- Identifying transit investments which might be leveraged to prioritize partner jurisdiction access improvement projects,
- Providing technical and administrative support
- Supplying policy language/recommendations for municipal transportation system priorities.

Our team will also provide information regarding federal, state, and regional funding programs that can be used for bicycle and pedestrian access improvement projects.

Deliverables: Technical Memorandum summarizing recommendations

4.5 First-Last Mile Strategy

The First-Last Mile Strategy document will consolidate all of the above components in a clear and concise document which is easily navigated, and is supplemented with compelling graphics, renderings and cross-sections and highlights local examples of similar solutions. The document will also include a summary of the System Access Research & Analysis as well as any other background information within an appendix document, as needed.

Deliverables: Five paper copies will be provided as well as an electronic copy in MS Word format.

Task 5: Final Report & Hearings

The IBI Group team will respond to agency comments and finalize the First-Last Mile Strategy document based on those comments. Once the document has been finalized the IBI Group Team will present the report to the MTA Board and SCAG Regional Council.

5.1 Obtain and Review Comments

Metro and SCAG technical advisory committees, including Planning and Programming, Street and Freeways, among others, will review the First-Last Mile Strategy document and will provide comments. The IBI Group team will summarize these comments and will recommend responsive actions.

Deliverables: Meeting notes, Technical Memorandum summarizing comments and recommending responsive actions.

5.2 Finalize Report

Based on comments and client direction, the IBI Group Team will complete and produce the Final Report.

Deliverables: 50 copies of final report and one electronic (PDF) version

5.3 Final Presentations

Key members of the IBI Group Team will present the report to the MTA Board and SCAG Regional Council, to provide an opportunity to solicit public comments.

Deliverables: 2 Board Reports, 2 Powerpoint presentations.