SCOPE OF WORK:
City of Oakland Complete Streets Action Agenda and Design Guidelines

The City of Oakland adopted a comprehensive Complete Streets Policy in February 2013 (C.M.S. 84204) to provide streets that are safe and convenient for all users of the roadway, including pedestrians, bicyclists, motorists, persons with disabilities, users and operators of public transit, seniors, children, and movers of commercial goods. The work products described in this scope are important complements to this policy, and will ensure the timely and effective implementation of complete streets throughout the City of Oakland.

The project will provide two primary work products. An Action Agenda will provide critical direction to staff in establishing city-wide Complete Street priorities, performance targets, and specific action items to ensure timely progress on implementing complete streets. The accompanying multimodal street typology and design guidelines will complement the Action Agenda through a unified set of design guidelines to ensure routine accommodation of all travel modes throughout the wide range of City activities that impact street design (e.g., development review, streetscape design, traffic signal upgrades, bicycle and pedestrian facilities design, etc.).

The study will also rely on public engagement to understand and promote a better understanding of how street design can positively impact quality of life in Oakland neighborhoods. The outreach efforts will include stakeholder interviews, presentations to a variety of community groups, and distribution of materials through the web and other social media.

Responsible Parties

City of Oakland staff will manage all aspects of the project, with the majority of technical work performed by a team of consultants. The City has not yet selected a consulting firm, and is committed to following City of Oakland and Caltrans protocol for procuring a consultant through a competitive bidding process. City staff anticipate that the grant request will be sufficient to cover all required consultant costs.

Project Objectives

- Build stakeholder consensus (internally and externally) on the key gaps between existing practices and complete streets concepts, and the necessary implementation steps to address these gaps.
- Clearly articulate specific objectives and performance metrics to implement the City’s Complete Streets Policy through a tailored Action Agenda.
- Develop a multimodal street typology to supplement the traditional functional classification system by prioritizing each street by mode (as well as adjacent land use and access to major transit facilities).
- Develop Complete Streets Design Guidelines to ensure that Oakland street design considers the full range of users on every street. The street typology will provide an organizing framework for the Design Guidelines.
• Produce targeted education materials to provide training to staff on use of the Complete Streets Design Guidelines.
• Develop public education materials on the concept of complete streets, and the Complete Streets Design Guidelines more specifically.

**Project Tasks and Deliverables**

1. **Project Kick-off**
   1.1. Kick-off Meeting

   The City 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. The City will provide a written summary of the meeting.

   *Responsible Party: City of Oakland*

   1.2. Form Technical Advisory Committee (TAC)

   City staff will identify a formal Technical Advisory Committee (TAC) that will provide review and comment throughout the project. TAC members will include both City staff and external stakeholders (e.g., partner agencies, transportation advocacy organizations). Total TAC membership will be approximately 12 members. We anticipate up to six (6) meetings of the TAC over the course of the project as part of key deliverable reviews.

   *Responsible Party: City of Oakland*

   1.3. Request for Proposals for Consultant Services

   City staff will complete an RFP process for selection of a consultant team using a competitive bidding process per City of Oakland standards. The consultant selection process will include TAC participation.

   *Responsible Party: City of Oakland*

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<th>Task</th>
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<tr>
<td><strong>1.1</strong></td>
<td>Meeting notes</td>
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<td><strong>1.2</strong></td>
<td>List of confirmed TAC members</td>
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<tr>
<td><strong>1.3</strong></td>
<td>Signed contract with Consultant team</td>
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</table>
2. **Review Existing Practices and Identify Critical Needs**

2.1. Internal Stakeholder Interviews

Consultant will conduct interviews with City employees involved in various aspects of complete streets, with the goal of understanding how the City’s Complete Streets Policy does or should relate to individual City work programs. The interviews will include representatives from multiple departments, including Public Works, Planning, and Economic Development. Prior to conducting interviews, consultant will develop interview template for review by City project manager.

*Responsible Party: Consultant Team*

2.2. External Stakeholder Interviews

Consultant will conduct interviews with external stakeholders, including partner agencies (e.g., AC Transit, BART), transportation advocates (e.g., East Bay Bicycle Coalition), and other organizations (e.g., business improvement districts). The external stakeholder interview will be used to understand how the City’s Complete Streets Policy can enhance relationships with these stakeholders. Prior to conducting interviews, consultant will develop interview template for review by City project manager.

*Responsible Party: Consultant Team*

2.3. Review Existing Plans and Policy

Consultant will review existing City of Oakland transportation-related plans and policies. The review will identify inconsistencies between existing policy and complete streets and key gaps where additional guidance may be valuable. City staff will assist the Consultant in identifying and locating documents for review based on the results of the stakeholder interviews.

*Responsible Party: Consultant Team*

2.4. Summarize Existing Practices and Identify Critical Needs

The Consultant will develop a technical memorandum summarizing the key lessons learned from the interviews and document review. The memorandum will identify existing strengths and weaknesses in City policy and practices with respect to implementing Complete Streets. The memorandum will be used as a reference to guide subsequent project tasks.

*Responsible Party: Consultant Team*
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<tr>
<th>Task</th>
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<tbody>
<tr>
<td>2.1</td>
<td>Interview template and written summary of interviews.</td>
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<td>2.2</td>
<td>Interview template and written summary of interviews.</td>
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<td>2.3</td>
<td>Written summary of key document review findings.</td>
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<td>2.4</td>
<td>Memorandum summarizing analysis findings.</td>
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3. **Complete Streets Action Agenda**  

3.1. Draft Complete Streets Goals and Objectives

The Consultant team will develop specific goals and objectives to complement and implement the City’s Complete Streets Policy. Goals will be used to categorize complete streets into several distinct concepts (e.g., safety), while objectives will provide specific measures that may be used to determine whether the various complete streets goals are being met. The results will be summarized in a brief memorandum.

*Responsible Party: Consultant Team*

3.2. Community Feedback

City staff and the Consultant will solicit feedback on draft goals and objectives in several ways. A web-based survey will be created and distributed through multiple parties, including members of the TAC. In addition, City staff will make presentations to the City’s Bicycle and Pedestrian Advisory Committee, Planning Commission, and Mayor’s Commission on Person’s with Disabilities. The results of the feedback will be documented in writing.

*Responsible Party: City of Oakland and Consultant Team*

3.3. Refine Complete Streets Goals and Objectives

The Consultant will revise the goals and objectives to reflect the community feedback.

*Responsible Party: Consultant Team*

3.4. Draft Action Agenda

The Consultant will develop a draft Action Agenda providing specific and measurable actions to ensure implementation of the Complete Streets Policy. The Action Agenda will be based on the goals and objectives developed above, but will differ in important ways from typical performance metrics.
Rather than be outcome-oriented as is typical for performance metrics (e.g., reduce crashes by X% by 2020), the document will be action-oriented (e.g., install X number of Y safety improvement by 2020). An action-oriented document both provides specific guidance to City staff, and ensures that meeting goals is not subject to outside factors. In addition, the actions should not identify specific projects, but should provide flexibility to staff in achieving the goals. For instance, rather than an objective to install bike lanes on X, Y, and Z streets, and appropriate action might be to install bike lanes on a minimum of X miles of streets. In this manner, the action remains measurable and objective but not overly prescriptive.

The recommended actions should be aggressive, yet they should also be realistic (e.g., recognize budget constraints). The draft Action Agenda will be circulated to the TAC for review and comment.

**Responsible Party: Consultant Team**

3.5. Final Action Agenda

The Consultant will revise the Complete Streets Action Agenda to reflect the TAC feedback.

**Responsible Party: Consultant Team**

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<th>Task</th>
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<tbody>
<tr>
<td>3.1</td>
<td>Draft memorandum of complete streets goals and objectives.</td>
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<tr>
<td>3.2</td>
<td>Meeting notes and written summary of comments received.</td>
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<tr>
<td>3.3</td>
<td>Final memorandum of complete streets goals and objectives.</td>
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<tr>
<td>3.4</td>
<td>Draft Action Agenda</td>
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<tr>
<td>3.5</td>
<td>Final Action Agenda</td>
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### 4. Multimodal Complete Street Typology

4.1. Suggest Typology Framework

The Consultant will develop a suggested framework for categorizing and prioritizing the Oakland street network based on the needs of all users. The current functional classification system works well only for automobile travel; the typology framework will provide a multimodal classification scheme that provides a more nuanced and balanced understanding of each street’s role within the transportation system (including adjacent land use and access to transit facilities). The street typology may provide separate classification schemes for each mode or a single typology depending on the findings of the Consultant team.
The Consultant will also review available data as part of developing the typology to ensure that the suggested framework can be applied to the Oakland street network using available data. The framework will be provided to the TAC for review and comment.

**Responsible Party: Consultant Team**

4.2. Apply Typology Framework

The Consultant will apply the multimodal street typology framework developed above to the entirety of the Oakland street network using available GIS data. The deliverables will include both maps of the resulting street typology and any GIS files associated with the analysis.

**Responsible Party: Consultant Team**

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<tr>
<td>4.1</td>
<td>Memorandum summarizing recommended typology framework.</td>
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<tr>
<td>4.2</td>
<td>Completed typology for entire street network, including maps and GIS files as appropriate.</td>
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5. **Develop Complete Street Design Guidelines**

5.1. Design Guidelines Peer Review

Numerous cities have developed street design guidelines in recent years, many of which allow for re-use and re-purposing of content. The intent of this task is to build on past work, rather than re-create existing material. As such, the Consultant will review exemplary examples of street design guidance to identify best practices that can inform development of the City of Oakland Design Guidelines.

**Responsible Party: Consultant Team**

5.2. Follow-up Stakeholder Interviews

The Consultant will conduct follow-up interviews as necessary with internal and external stakeholders to better understand existing and desired design guidance related to complete streets. This second round of interviews will be a subset of the initial interview list, focused specifically on street design questions.

**Responsible Party: Consultant Team**

5.3. Develop Recommended Structure and Annotated Outline
The Consultant will prepare a recommended structure and outline for the Design Guidelines. The draft structure will include a mock-up of page layout, as well as the recommended organization of content within the Design Guidelines. Note that the street typology developed in Task 4 should inform the organization of the Design Guidelines.

The TAC will review and approve the recommended structure prior to the Consultant beginning work on the Complete Streets Design Guidelines.

*Responsible Party: Consultant Team*

5.4. Develop Draft Complete Streets Design Guidelines

The Consultant will develop comprehensive Complete Street Design Guidelines that includes, but is not limited to, all improvements relating to pedestrian and bicycle facilities, street lighting, transit stops, utilities, landscaping and signage. The Guidelines should be consistent with all recommendations derived from stakeholder interviews and other project tasks.

To the extent possible, the Design Guidelines will use best practices already developed and incorporated into national and peer-city manuals. However, the material will be augmented to reflect Oakland-specific design considerations, policies, and the multimodal street typology. The Draft Design Guidelines will be provided to the TAC for review and comment.

*Responsible Party: Consultant Team*

5.5. Final Complete Streets Design Guidelines

The Consultant will prepare the Final Complete Street Design Guidelines based on City and TAC comments.

*Responsible Party: Consultant Team*

5.6. Develop Complete Streets Design Checklists

Based on the Design Guidelines, the Consultant will prepare a street design checklist (or set of checklists). The design checklist(s) will be used to facilitate implementation of the guidelines by providing easy to use reference material for City staff and transportation project stakeholders.

*Responsible Party: Consultant Team*
### Task and Deliverable

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<tr>
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<tbody>
<tr>
<td>5.1</td>
<td>Written summary of peer review findings.</td>
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<td>5.2</td>
<td>Written summary of interviews.</td>
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<td>5.3</td>
<td>Draft annotated outline.</td>
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<td>5.4</td>
<td>Draft Complete Streets Design Guidelines</td>
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<td>5.5</td>
<td>Final Complete Streets Design Guidelines</td>
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<tr>
<td>5.6</td>
<td>Complete Streets Design checklists</td>
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6. **Produce Training Materials**

6.1. **Develop Training Materials for Internal Staff**

The Consultant will develop training materials on the Complete Streets Design Guidelines suitable for the transportation professionals who will apply the Guidelines on a regular basis. Training materials may include presentations and/or hand-outs, but must also include interactive exercises to better engage trainees and ensure comprehension of the material.

*Responsible Party: Consultant Team*

6.2. **Provide Training to Internal Staff**

The Consultant will provide staffing for one (1) 4-hour training of City staff using the training materials developed in Task 6.1.

*Responsible Party: Consultant Team*

6.3. **Develop education materials for external stakeholders and the public**

The Consultant will develop education materials on the Complete Streets Design Guidelines suitable for non-transportation professionals. The materials may include presentations, posters, and/or hand-outs, with the intent that they will be available on an as-needed basis to City staff.

The materials may also be appropriate for handouts at street fairs or other community events staffed by City transportation personnel.

*Responsible Party: Consultant Team*

6.4. **Design Guidelines Public Roadshow**
Using the materials developed by the Consultant team in Task 6.3, City staff will schedule and staff up to fifteen (15) public presentations on the Complete Streets Design Guidelines. The presentations are envisioned as occurring throughout the City, and will occur as part of regularly scheduled meetings (e.g., neighborhood associations) rather than as stand-alone workshops. The Design Guidelines roadshow will provide numerous opportunities for interested members of the public to learn more about the City’s Complete Streets program, with the goal of establishing more collaborative and productive relationships with stakeholders throughout the City.

**Responsible Party: City of Oakland**
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<tr>
<td>6.1</td>
<td>Training materials, including presentations, hand-outs, interactive exercises, and other materials as appropriate.</td>
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<tr>
<td>6.2</td>
<td>Training materials, including presentations, hand-outs, interactive exercises, and other materials as appropriate.</td>
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<tr>
<td>6.3</td>
<td>Written documentation for completion of training workshop.</td>
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<tr>
<td>6.4</td>
<td>Written documentation for completion of at least fifteen (15) public presentations.</td>
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## 7. Project Management and Administration

### 7.1. Fiscal Administration

Submit complete invoice packages to Caltrans District staff based on milestone completion, monthly to quarterly.

*Responsible party: City of Oakland*

### 7.2. Quarterly Reports

Submit quarterly reports to Caltrans District staff providing a summary of project progress and grant/local match expenditures.

*Responsible party: City of Oakland*

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<tbody>
<tr>
<td>7.1</td>
<td>Invoice packages.</td>
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<td>7.2</td>
<td>Quarterly reports.</td>
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