

# Scope of Services

## SCOPE OF SERVICES

### Summary of the Work Program

EDAW will work closely with a working group, consisting of designated staff members from both the City of Albany and the City of Piedmont and other designated members of those communities to formulate a CAP for each City. We envision an approach to the work program that includes community involvement that will help the consultant team gather input and provide opportunities for education. This strategy will allow the working group and consultant to focus on the issues that matter most to the community and provide a foundation for the preparation of the CAPs. The next steps will involve the preparation of the Draft and Final CAPs which entails the creation of a prioritized list of reduction measures along with costs and benefits for each, and implementation strategies to achieve each city's respective GHG emissions reduction target. Furthermore, each city desires to identify goals, policies and programs from the CAP that can and should be incorporated within their General Plans. In the case of Albany, these considerations can serve as a guiding force for an anticipated General Plan update to be completed within the next few years. For Piedmont, they may be incorporated within the ongoing General Plan update being completed concurrently with the CAP.

Below in the program work scope, we provide specific details—tasks, approach, data and information requirements, meetings, deliverables—for each key step. We intend to complete these tasks for both cities simultaneously, in order to gain time-saving efficiencies, share knowledge sources, and encourage mutually beneficial innovation. A summary of key deliverables and meetings associated with each task is also provided below.

As discussed during our interview with the cities, EDAW annually sets aside a portion of our revenues each year to support research and development in emerging practice areas, such as climate action planning. EDAW proposes to apply a portion of these funds to completion of the Albany and Piedmont CAPs. Specifically, EDAW will complete a CAP

powerpoint presentation and a web-based climate action community survey to support preparation of the Albany and Piedmont CAPs at no cost to the cities. EDAW will provide discounted rates to the Cities of Albany and Piedmont *specifically applicable to this work program*, in the interest of assisting the cities in meeting the budget objectives established within their Bay Area Air Quality Management District (BAAQMD) grant.

Our proposed work program is presented in the tasks below. The general project schedule is depicted in a table following the scope of services.

### Task 1. Project Management and Consultation Meetings

EDAW will provide ongoing oversight and management of the consultant team. EDAW will meet with city staff, including an initial kickoff meeting, to discuss project management issues and review work progress in relation to work program milestones. Meetings can also be conducted as conference calls.

#### Meetings and Work Products:

- Kickoff meeting
- Up to six (6) one-hour conference calls with City staff

#### 1.1 Project Management

EDAW will provide the necessary project management and administrative activities in order to track project progress, maintain schedule and budget, respond to requests for information, and to participate in working group meetings. EDAW's Project Manager will also provide monthly status updates accompanying invoices and be available as needed to discuss and resolve project management issues. EDAW understands that the cities are responsible for quarterly grant progress reports to BAAQMD, and will provide information to assist staff in preparing the status reports upon request.

#### Meetings and Work Products:

- Monthly status updates accompanying invoices

### 1.2 Consultation Meetings - Albany

For Albany, the City's Sustainability Committee is providing CAP oversight. EDAW understands the Albany's Sustainability Committee meets once a month, and that the CAP represents a major portion of the Committee's work over the next 12 months.

EDAW will attend up to four (4) meetings of Albany's Sustainability Committee throughout CAP preparation. These meetings will consist of the following:

- #1 - A project kickoff meeting, including discussion of existing GHG reduction ideas, and priorities developed by the Committee;
- #2 - A meeting to review climate change survey results, as described in Task 3.3;
- #3 - A meeting to review preliminary GHG reduction measures, as described in Task 4.1; and
- #4 - A meeting to review the Preliminary Draft CAP, as described in Task 4.4.

For each meeting, EDAW will provide an agenda, a meeting facilitator/note recorder, and a summary of key information and points to be discussed.

#### Meetings and Work Products:

- Up to four (4) committee meetings
- Meeting agendas and summary of key points

### 1.3 Consultation Meetings - Piedmont

For Piedmont, the City's Environmental Task Force is providing CAP oversight. EDAW understands that the Task Force meets once per quarter, and that the CAP represents part of the Task Force's work program over the next 12 months.

EDAW will attend up to four (4) meetings of Piedmont's Environmental Task Force throughout CAP preparation. These meetings will consist of the following:

- #1 - A project kickoff meeting, including discussion of existing GHG reduction ideas and priorities developed by the Task Force;
- #2 - A meeting to review climate change survey results, as described in Task 3.3;

- #3 - A meeting to review preliminary GHG reduction measures, as described in Task 4.2; and
- #4 - A meeting to review the Preliminary Draft CAP, as described in Task 4.5.

For each meeting, EDAW will provide an agenda, a meeting facilitator/note recorder, and a summary of key information and points to be discussed.

#### Meetings and Work Products:

- Up to four (4) committee meetings
- Meeting agendas and summary of key points

### Task 2. Update Greenhouse Gas Emissions Inventories

As part of this task, EDAW will review the existing GHG inventories for Albany and Piedmont.

#### 2.1 Update GHG Inventory - Albany

EDAW will perform a peer review of the emissions inventory prepared for the Albany by ICLEI in 2006, and any updates thereof, to ensure emissions allocations per source type are accurate (e.g., 42% transportation; 29% commercial; 29% residential, and 1% for municipal emissions). EDAW will update the emissions inventory based on input parameters and information to be supplied by the city. EDAW will supply to the city a list of required data prior to the update. It is assumed that EDAW will be provided access to all files and information associated with the current emission inventory, and authorized to use the city's registration for the ICLEI software to complete the update.

#### Meetings and Work Products:

- Memorandum summarizing peer review findings

#### 2.2 Update GHG Inventory - Piedmont

EDAW will perform a peer review of the emissions inventory prepared for Piedmont by ICLEI in 2006, and any updates thereof, to ensure emissions allocations per source type are accurate (e.g., 50% transportation; 3% commercial, 47% residential, and 2% for municipal emissions). EDAW will update the emissions inventory based on input parameters and information to be supplied by the city. EDAW will supply to the city a list of required data prior to the update. It is assumed that EDAW will be provided access to all files and information associated with the current emission inventory, and authorized

to use the city's registration for the ICLEI software to complete the update.

*Meetings and Work Products:*

- Memorandum summarizing peer review findings

### **Task 3. Initial Community Outreach**

The purpose of this task is to initiate community outreach activities for the CAPs, consisting of a powerpoint presentation each city can use to make presentations to other community groups regarding the CAP process, and a community survey regarding potential greenhouse gas reduction strategies. EDAW understands that the cities of Albany and Piedmont desire to use the survey to “cast a wide net”, seeking input regarding the likely up-take of various GHG reduction measures, and gathering new ideas about additional potential measures.

#### **3.1 Prepare CAP Powerpoint Presentation (This task will be completed at no cost to the cities.)**

EDAW will prepare an informative and entertaining PowerPoint presentation that can be used by the cities and their advisory committees to describe the preparation of the CAP to applicable meeting groups.

*Meetings and Work Products:*

- Powerpoint presentation

#### **3.2 Prepare and Administer Climate Change Community Survey (This task will be completed at no cost to the cities.)**

EDAW will prepare a draft community survey questionnaire to be administered as a web-based survey on *surveymonkey.com*, *zoomerang.com*, or a similar website. In designing the survey questions, EDAW will review and consider previous survey data collected by the cities such as the May 2007 resident survey that was performed as part of the City of Piedmont's General Plan Update. The survey will be prepared to incorporate custom skip logic based on answer patterns, and will offer the opportunity to summarize responses by city, GHG emissions sector (e.g. residential, commercial, industrial, transportation), as well as a variety of demographic factors (e.g., age, race/ethnicity, gender, age, owner/renter).

EDAW will draft survey questions that solicit useful information and opinions from Albany and Piedmont citizens. Questions may address travel behavior, infrastructure, housing variety, energy efficiency, economic vitality, and other topics of importance to the two communities. A specific time period for gathering community response with the survey will be established at project kickoff. EDAW will coordinate with the city staff and the advisory committees regarding assistance they can provide to promote the survey, including email mailing lists; city cable channels; city newsletters, city websites; presentations to city-appointed committees, commissions, and councils; school district e-trees; limited mailers to businesses and homeowners; and invitations to participate in the survey at public computer terminals located at libraries, senior centers, teen centers, and public information areas within city facilities.

*Meetings and Work Products:*

- Draft and final survey web-based survey questionnaires
- Web-based survey completion

#### **3.3 Summarize Community Survey Results for Each City**

EDAW will tabulate the survey results and prepare a brief memorandum summarizing key findings to be reviewed with the Albany Sustainability Committee and Piedmont Environmental Task Force, as described in Tasks 1.2 and 1.3. Separate memorandums will be developed and distributed for each city. Survey results will be used to support selection and prioritization of GHG reduction measures, as described in Task 4.

*Meetings and Work Products:*

- Memorandum summarizing survey results.

### **Task 4. Prepare Draft Climate Action Plan**

This task consists of preparation of Draft CAPs for each jurisdiction, beginning with selection and review of GHG reduction measures, leading to preparation of preliminary draft and public review draft CAPs for each city.

#### **4.1 Prepare Preliminary List of Reduction Measures - Albany**

EDAW will prepare a preliminary list of potential reduction measures along with initial cost and benefit information as a starting point for the draft CAPs for Albany. EDAW will prepare

this preliminary list based on input and direction received after completion of the community survey and review of other community data sources. EDAW will also rely on previous global searches performed to identify a broad list of options and prepare associated reduction forecasts. This list will be prepared in a manner that allows staff and advisory committee members to “affirm,” “modify,” or “delete” measure language in light of the survey results, measures suggested by the City’s Clean & Green Task Force and other community input received at *Greening Albany* outreach activities. Measures which would be best presented as proposed General Plan goals, policies, or implementation programs for Albany’s subsequent General Plan update will be identified as such. This list provides an additional opportunity for suggesting modifications or ideas. Various measures may also be assigned a ranking according to priority. This preliminary list will be prepared keeping in mind consistency with BAAQMD goals and objectives.

Potential measures will be presented for discussion at Sustainability Committee meeting #3, as described in Task 1.2. Following review of the preliminary list, EDAW will first prepare a prioritized list of measures along with the identification of costs and benefits for each. Implementation strategies will be included for each measure to assist City decision-makers to prioritize City actions necessary to implement measures and to identify funding sources to be used. The identified implementation measures will discuss financing strategies initiated by other California cities which could be applied to Piedmont or Albany. This could include a local carbon tax, community benefits district, construction excise tax, or other financing mechanism.

*Meetings and Work Products:*

- Preliminary list of reduction measures - Albany

**4.2 Prepare Preliminary List of Reduction Measures - Piedmont**

A similar list of reduction measures will be prepared for Piedmont as is described for Albany in Task 4.1. This list will be prepared in a manner that allows staff and advisory committee members to “affirm,” “modify,” or “delete” measure language in light of the survey results and other community input received through General Plan update outreach activities. Measures which are best presented as General Plan goals, policies, or implementation programs will be identified as such and prioritized for inclusion in Piedmont’s General Plan update, if feasible. Potential measures will be presented

for discussion at Environmental Task Force meeting #2, as described in Task 1.3.

*Meetings and Work Products:*

- Preliminary list of reduction measures - Piedmont

**4.3 Prepare Preliminary Draft Climate Action Plan - Albany**

EDAW will complete a Preliminary Draft CAP for Albany for review with the Sustainability Committee to ensure understanding of content.

Prior to preparing the preliminary draft, EDAW will provide the city with a detailed annotated outline of the proposed contents of the CAP for review and approval. The Preliminary Draft CAP will make substantial use of graphics, including charts, diagrams, and tables to convey key information. The majority (80 to 90%) of the document will convey reduction measures along with associated costs, benefits, implementation strategies, and forecasted reductions, incorporating only a minimal amount of background information. Measures that would best be presented as future General Plan goals, policies, or implementation programs will be identified as such, so that the city may draw upon these as it updates its General Plan in the future. The Preliminary Draft CAP will be reviewed with the Sustainability Committee at meeting #4, as described in Task 1.3. Comments received from staff and the Sustainability Committee will be used to prepare the Public Review Draft CAP.

*Meetings and Work Products:*

- Preliminary draft CAP - Albany

**4.4 Prepare Preliminary Draft Climate Action Plan - Piedmont**

A Preliminary Draft CAP will also be prepared for Piedmont as is described for Albany in Task 4.4. Measures that are best presented as future General Plan goals, policies, or implementation programs will be identified as such, so that the city may incorporate them within the General Plan update currently underway. The Preliminary Draft CAP will be reviewed with the Environmental Task Force at meeting #3, as described in Task 1.4.

*Meetings and Work Products:*

- Preliminary draft CAP - Piedmont

#### 4.5 Prepare Public Review Draft Climate Action Plan - Albany

Based on city staff and Sustainability Committee comments, EDAW will prepare a Public Review Draft Climate Action Plan for Albany. EDAW assumes that city staff and the Sustainability Committee will develop an appropriate distribution list, and circulate the Draft CAP to the public and applicable agencies and interest groups. EDAW recommends a 30-day public review period during which comments on the Draft CAP will be accepted.

##### *Meetings and Work Products:*

- Public review draft CAP - Albany

#### 4.6 Prepare Public Review Draft Climate Action Plan – Piedmont

Based on city staff and Environmental Task Force comments, EDAW will prepare a Public Review Draft Climate Action Plan for Piedmont. EDAW assumes that city staff and the Environmental Task Force will develop an appropriate distribution list, and circulate the Draft CAP to the public and applicable agencies and interest groups. EDAW recommends a 30-day public review period during which comments on the Draft CAP will be accepted.

##### *Meetings and Work Products:*

- Public review draft CAP - Piedmont

#### Task 5. Climate Action Community Forums (2)

Following completion of the Public Review Draft CAPs and during the 30-day public review period, EDAW will facilitate one community forum in each city (total of 2 forums) to present CAP information for each city and to engage the public in lively, interactive dialogue concerning the cities' futures with respect to the reduction of GHG emissions. The objective of the forums will be to offer an overview of the Draft CAP and present opportunities for "fine-tuning."

EDAW recommends a combination "open-house" and "town-hall meeting" format, lasting approximately three (3) hours. The first portion of the workshop will allow participants to visit up to four (4) "stations" describing groups of related GHG reduction measures, along with the rationale for their selection, effective contribution toward the GHG reduction target, economic trade-offs, and associated day-to-day lifestyle changes. Opportunities for one-on-one dialogue with

staff, committee members and consultants will be offered and public comments/input will be recorded at each station. Following the workshop, the boards and displays prepared for each station may be used by the cities as "static" displays that can be assembled at farmer's markets, city hall lobbies, public libraries, community centers or other public spaces to encourage further input.

The second portion of the workshop would consist of a traditional facilitated presentation and discussion, summarizing the key comments received at each station during the first portion of the workshop, and adding additional ideas suggested by the audience.

Our scope of work for each of the forums includes attendance, coordination with city staff regarding logistics and scheduling, preparation of materials and displays, note-taking, and preparation of a summary report. Our scope and budget further assumes EDAW's attendance at each city's climate action community forums on consecutive days.

##### *Meetings and Work Products:*

- Attendance by up to two (2) EDAW staff at Albany Climate Action Community Forum
- Attendance by up to two (2) EDAW staff at Piedmont Climate Action Community Forum
- Display boards, educational materials and fact sheets to support each of up to four (4) stations at each forum

#### Task 6. Prepare Final Climate Action Plans

The purpose of this task is to prepare Final Climate Action Plans for public hearings before the City Councils of Albany and Piedmont, respectively. The Final CAPs will incorporate public comments received at the Climate Action Community Forums described in Task 5 and other written comments received during the 30-day public review period.

At the conclusion of the public review period on the Draft CAPs, EDAW will provide a brief summary characterization of the nature of public comments for staff consideration prior to preparing the Final CAPs. If clarifications are needed to comments from agency-sponsored letters, EDAW staff will solicit clarification, unless the city committees desire to conduct this effort.

EDAW assumes that no new information will be raised in the comments that require substantive revisions to the CAP. If the

volume or complexity of the comments requires additional effort, an adjustment to the work plan and budget would be needed. Because we cannot predict in advance the volume of comments or the time required to respond to comments, we will advise the city if additional funding will be needed to complete the responses to comments and any other revisions to the Final CAP resulting from those responses.

### 6.1 Final Climate Action Plan – Albany

EDAW will prepare a Final CAP for Albany that consists of an introductory chapter, appropriate revisions to the text of the Draft CAP in consideration of public comments, and a summary characterization of comments received. Comment letters and public meeting transcripts related to comments on the Draft CAP will be packaged separately for the city to retain on file. For Albany, the Final CAP will identify potential GHG reduction goals, policies, and programs that can establish a foundation for Albany’s upcoming General Plan update. EDaw further assumes that Albany’s action to adopt the Final CAP would not include actions that cause physical changes to the environment, thus qualifying for the CEQA statutory exemption for planning studies (State CEQA Guidelines Section 15262).

#### *Meetings and Work Products:*

- Final CAP - Albany

### 6.2 Final Climate Action Plan – Piedmont

EDAW will prepare a Final CAP for Piedmont, as described in Task 6.1 above for Albany. For Piedmont, the Final CAP will identify potential GHG reduction goals, policies, and programs to be incorporated within Piedmont’s current, ongoing General Plan update. EDaw further assumes that Piedmont’s action to adopt the Final CAP would be addressed as an action associated with adoption of the updated General Plan, which is currently planned to be addressed through preparation of a CEQA Negative Declaration or Mitigated Negative Declaration under the city’s current General Plan update contract.

#### *Meetings and Work Products:*

- Final CAP - Piedmont

## Task 7. Attend Planning Commission and City Council Hearings

Key members of the EDaw team will be available to attend public hearings before the cities’ respective Planning Commissions and City Councils for adoption of the CAPs.

### 7.1 Attend Hearings – Albany

EDAW will present, as needed, Albany’s CAP and respond to public, Commission and Council comments and questions. The work scope assumes that two EDaw staff members will be present at one Planning Commission hearing and one City Council hearing.

#### *Meetings and Work Products:*

- Attendance and presentation at one (1) Planning Commission hearing – Albany
- Attendance and presentation at one (1) City Council hearing - Albany

### 7.2 Attend Hearings - Piedmont

EDAW will present, as needed, Piedmont’s CAP and respond to public, Commission and Council comments and questions. The work scope assumes that two EDaw staff members will be present at one Planning Commission hearing and one City Council hearing.

#### *Meetings and Work Products:*

- Attendance and presentation at one (1) Planning Commission hearing – Piedmont
- Attendance and presentation at one (1) City Council hearing - Piedmont

## WORK PRODUCTS

Our budget for direct costs represents our best estimate of internal costs for travel, reproduction, supplies and materials, communications, postage/delivery, and other miscellaneous costs. We have included a reasonable allowance for printing or reproduction of multiple copies of certain work products. For our work products, our cost estimate assumes one digital copy of each work product is provided to the cities for distribution and/or reproduction.

If the cities would like EDaw to print paper copies, we will do so as an additional cost item beyond the contract price. The cost

of such documents will depend on the number of pages, number of color pages, graphic content, and number of oversized pages (11" x 14", 11" x 17", etc.), use of section dividers, and other factors. Because we cannot predict, in advance, the cost per document, we will charge for the actual cost of copying plus 15% for our handling costs. We will provide the cities with an advance cost estimate from our printer for approval by the respective city in the event actual printing costs exceed the printing allowance contained in our budget.

#### PROJECT SCHEDULE

A proposed 12-month schedule to complete the Albany and Piedmont CAPs is provided in a table on the following page. EDAW recommends a 12-month work program to achieve

program and budget efficiencies and to maintain a high level of public interest.

#### CONTRACT PRICE

EDAW proposes to complete this work program for a fixed price of \$60,015, as identified in the attached estimate. Monthly invoicing will be submitted showing the percentage of the scope of work completed each period and cumulative percentage of work completed. The invoiced amount will be calculated on this percent-complete basis with an accompanying narrative progress summary. The price is also based on the cost assumptions provided following the schedule.

## Project Schedule

Tasks	Month Completed
Notice to proceed	July 2008
Kickoff Meetings with Advisory Groups (Albany Sustainability Committee and Piedmont Environmental Task Force)	August 2008
Update Greenhouse Gas Emissions Inventories	August 2008
Prepare CAP Powerpoint Presentation	August 2008
Climate Change Community Survey	October 2008
Meetings with Advisory Groups (Review Survey Results)	October 2008
Establish GHG Reduction Target – Piedmont (City Council Mtg.)	November 2008
Preliminary Reduction Measures	December 2008
Meetings with Advisory Groups (Review Reduction Measures)	December 2008
Prepare Preliminary Draft CAPs	February 2009
Meetings with Advisory Groups (Review Preliminary Draft CAPs)	March 2009
Prepare Public Review Draft CAPs	April 2009
Climate Change Community Forums	May 2009
Prepare Final CAPs	June 2009
PC and CC Public Hearings	July 2009

## CONTRACT PRICE ASSUMPTIONS

With the objective of ensuring clarity about the contract price, EDAW has prepared assumptions that explain the basis for the cost and effort to implement this scope of work. The assumptions underlying the proposed work are:

1. The cities will develop the mailing list for distribution of the CAP and any notices.
2. The cities will be responsible for newspaper cost of publication of notices, so they are not included in the proposed budget.
3. Photocopy costs included in the budget are limited with the emphasis on electronic deliverables. If additional copies of deliverables are needed, they can be provided with an amendment to the contract price.
4. Review cycles for preliminary documents are presented in the scope of work. Additional review cycles or additional versions of preliminary drafts are assumed to not be needed.
5. The proposed work assumes that adoption of the CAP would be exempt from CEQA, so no CEQA documents are included. If CEQA compliance is needed, EDAW can prepare appropriate documents with an amendment of the scope of work and contract price.
7. Costs are included for the number of meetings specified in the scope of work. If additional meetings are needed, they can be included with an amendment of the budget.
8. The extent of public comment on the CAP is not predictable. The proposed budget includes a reasonable, preliminary estimate time to revise the CAP in consideration of public comments. EDAW will consult with the cities after the evaluation of the comments to determine if the preliminarily estimated budget is sufficient.