

ATTACHMENT A

Scope of Work

I. General: The work to be accomplished is in support of the following Atlanta Regional Commission (ARC) subelement:

602 CAS - Livable Centers Initiative Investment Policy Studies (LCI)

II. Area covered: All the necessary services provided in this subgrant contract will support the study of LCI-related programs and projects within the Jonesboro LCI area.

III. Goal: The Atlanta Metropolitan Transportation Planning Area is included in a non-attainment area for ozone under the Clean Air Act Amendments of 1990. Because of this designation, the region must look toward better development practices that support increased use of transportation modes other than single occupant vehicles (SOV) to help reduce emissions and meet air quality requirements. The LCI Program seeks to increase the use of alternatives to driving alone by developing transportation projects and other programs to improve accessibility, expand mixed-uses, utilize transit and support further development in the study area. Evaluation of the existing structure and development of likely scenarios should produce recommendations for future investment that support ARC's Livable Centers Initiative Program.

IV. Work Tasks:

The City of Jonesboro will prepare a major update to their existing LCI study. The purpose of this update is to keep the LCI plan relevant and produce new recommendations for implementation. The overall intent of the LCI plan should not change and updated goals, policies and action strategies must remain consistent with the LCI program goals.

The City and ARC anticipate the following outcomes from the study to be:

- A tool to inform current and future stakeholders about The City of Jonesboro vision and goals for Downtown area.

- Assist the City Council in identifying and prioritizing public investment initiatives in the district;

- Provide marketplace data regarding retail service, commercial and residential capacity of the Downtown area

- Assist with strategy and policy development;

- Assist developers in gaining an understanding of the type, scale, design and location of desired development;

- Establish a development framework for site-specific redevelopment opportunities;

- Develop policies related to the City of Jonesboro role in economic development activities; and

- Establish a basis for land use and zoning policies reflecting community desires.

The work to be accomplished under this contract is divided into the following tasks:

Task 1 – Existing Plan Assessment

The sponsor will conduct a thorough review and assessment of the existing LCI plan and any subsequent updates. The focus of the assessment will include, at a minimum, the following:

- Review the most recent LCI 5-year action plan and identify the status of each item listed (use ARC template)
- Review the recommendations and proposals of all other non-LCI plans and each item’s status or relevancy
- Review existing plans’ proposals for future land uses, development, zoning, transportation and public facilities and compare to conditions “on the ground” today.
- Conduct additional technical analysis on targeted subareas that have changed significantly since the last plan update, may include traffic analysis, walkability assessment,
- Identify issues in reaching full LCI plan consistency with local development regulations and other obstacles to plan implementation.

Task 2 – Market Analysis

Prepare a market or fiscal feasibility analysis that supports the plan recommendations and ensures the proposed plan is realistic.

The focus of the assessment will include, at a minimum, the following:

- Level of market opportunity and depth by land use and product type (i.e. how much and what type of retail is needed, overbuilt, etc.)
- Demand and feasibility assessment for retail, office, and industrial within the LCI area and assessment of competing retail, office, and industrial districts to the LCI area.
- Identify best practice and/or new development incentives or financing mechanisms for including public and private sources of funding.
- Identify market potentials for Downtown area with respect to the following market segments: retail, dining/entertainment, personal and professional services, office, housing.
- Quantify future demand for the market segments listed above over a defined time horizon (five to ten years) in terms of nonresidential square footage and number of housing units by housing type.
- Identify an optimal tenant mix for Downtown area, including recommendations for geographically clustering mutually supporting uses, if relevant.
- A written description of past absorption trends within Downtown area for the various market segments being studied.
- A written projection of future absorption trends quantified by square footage and housing units within Downtown area for the various market segments being studied. This may include a contextual comparison to downtown development trends nationwide.
- Recommended interventions to promote business and housing development. Examples of potential interventions to be explored include financial incentives from the City, special districts, marketing materials and strategies for recruitment efforts, and general improvements tied to physical and social issues (parking, lighting, public safety, etc.).

- Define primary, secondary and potentially tertiary trade areas. Trade areas should be identified with consideration of population, proximity to other competing business districts, destination attractions, traffic patterns, drive times, retail mix, store sizes and sales volumes, and actual customer data. Data derived from actual customer spending in the City of Jonesboro is preferred.
- Develop customer profiles, the customer profile information should include detailed demographics, lifestyle segmentation data, actual customer spending habits, and any other information deemed pertinent by the selected contractor.
- An analysis of the trade areas should be completed to identify new potential customers and additional market sales potential derived from the customer profile data and actual market supply and demand data.

Task 3 – Public Input

The goal of this task is to develop a local planning outreach process that promotes the involvement of all stakeholders in the study area, with efforts and accommodations made to include low to moderate income, minority, and elderly or disabled citizens. The Subgrantee will identify all stakeholders and facilitate their involvement in the study process. These tasks will be documented through meeting notices, meeting summaries and other written communications. Responses and acknowledgement of public comments will be addressed in the study reports. The public involvement process shall, at a minimum, include the following components:

- *Project Management Team*
The Subgrantee shall establish a Project Management Team that includes a representative from the Subgrantee, the consultant, and ARC. This team shall meet or hold a conference call monthly to discuss the study progress and advise on public involvement and other planning process issues.
- *Core Team*
A core team shall be established that includes the members of the Project Management Team along with a representative from key stakeholder groups in the study area. The Core Team must include representatives from relevant state, regional and local government departments responsible for land use planning, transportation and housing (including applicable housing authorities/agencies). Representatives from non-profit organizations that provide services in the study area should also be included on the Core Team. It is the intent that the LCI plan will also serve as the Comprehensive Plan for the City of Jonesboro, therefore the Core team shall meet the standards identified in the Minimum Standards and Procedures of Local Comprehensive Planning.

This team shall, at a minimum, meet prior to each of the general public meetings (not necessarily on the same day) described below. The key responsibility of the Core Team is to review and comment on materials to be presented at public meetings, help advertise meetings, and distribute information to the larger community.

- *General Public Meetings*

During the study process, the Subgrantee shall make a reasonable effort to involve all stakeholders in the study area, including property owners, residents, business owners and employers/employees. The public involvement process should include a variety of methods, times, and techniques to reach the broadest range of stakeholders possible (i.e. workshops, charrettes, forums, surveys, open houses, etc). The Project Team and Core Team must be notified of all meetings taking place.

A minimum of three **(3) General Public Meetings**, in a format determined by the project team,. The following topics/milestones should be covered by the public meetings (at a minimum):

- Provide overview of study process, the goals of the study, key dates, and opportunities for public input.
 - Solicit opinions on goals and objectives of the study, and needs, strengths, weaknesses, opportunities and threats in the study area.
 - Review preliminary findings, present draft plan and gather comments.
 - Seek approval for final plan documents.
- *Final Plan Review and Transportation Coordination Meeting*
A transportation project coordination meeting, and final plan review by ARC, is required to be conducted prior to finalizing the LCI plan recommendations. A single combined meeting can be held in lieu of two separate meetings if feasible. To ensure the transportation projects are feasible, the coordination meeting should include all affected organizations (such as GDOT, MARTA, City Public Works, etc.) to discuss potential projects prior to the transportation improvement list being finalized.

Task 4 – Updated Concept Plan

Review the existing plan and update the goals, policies and action strategies based on the findings of Task 1, 2, and 3 along with changing conditions/priorities in the community. Prepare a detailed development concept plan. At a minimum, this study will assess and update the subject area’s current land use patterns, transportation patterns and urban design elements, including pedestrian, bicycle and transit access; access to jobs, retail and neighborhood services; diversity of dwelling types; and design for healthy living and social interaction. This analysis should be coordinated with other completed studies, programs, developments and organizations. At a minimum, this study will evaluate and address the following information:

1. Existing conditions, land uses, zoning, transportation facilities, previously completed plans and studies, permitted developments and projects in the pipeline.
2. Development concept plan, land use and policy proposals that address:
 - a) Efficiency/feasibility and mix of land uses appropriate for future growth including new and/or revised land use regulations needed to complete the development program.
 - b) Mixed-income housing, job/housing match and social issues
 - c) Potential Station Location(s) for future transit investments

3. Transportation assessment and recommendations which include:
 - a) Transportation demand reduction measures.
 - b) Internal mobility improvements including traffic calming, pedestrian and bicycle circulation, transit access, and safety and security of all modes.
 - c) Continuity of local streets in study area and extension of the street grid.
4. Implementation strategy that has the support of the community and public and private stakeholders, and addresses community organization, management, promotion, and economic restructuring to ensure implementation.

Task 5 – Prepare Project Deliverables

The goal of this task is to compile the results of the overall work effort, the study process, relevant findings, and recommendations into a final study/plan document. The final study document shall include the following (not necessarily in this order):

- **Summaries of the plan development process:**
 - a) A description of the study process and methodology, data gathering techniques and findings, and general outcomes.
 - b) A description of the public participation process used to achieve a community-supported program of improvements.
- **Existing conditions summary, including:**
 - a) Maps, concept illustrations, and other graphic representations to support the plan including (but not limited to): the study area, existing land use, future land use, existing transportation facilities, and proposed transportation improvements.
 - b) Existing and projected population and employment data, including the following:
 - c) Number of existing and anticipated housing units and population
 - d) Distribution of proposed housing units by type
 - e) Number of existing and anticipated jobs
 - f) Square feet of future non-residential development
- **Market/Fiscal Feasibility Analysis:**

Include a summary of the market study findings in the planning document and executive summaries, and provide the full market/fiscal feasibility report as an appendix.
- **Implementation Strategy:**
 - a) Describe the organizational structure and process that will be used to ensure the action plan items are implemented, in collaboration with the Clayton County and MARTA. Focus should be given to collaboration opportunities with other organizations and strategies to ensure continued support from local elected officials, citizens and businesses.

- b) A 100-day Action plan shall be developed to include no-cost or very low-cost actions and organizational steps needed to keep momentum going and the stakeholders involved and sharing responsibility for the plan’s success.
 - c) An evaluation process used to monitor plan implementation and update the action plan every five years (or more often if need), should be identified.
- **Five-year Implementation Plan (aka Schedule of Actions):** Using the “5 Year Implementation Plan” template provided by ARC, create a list of all actions and projects that are planned in the study area to implement the study goals, programs, and projects. Schedules should include estimated start date, completion date, cost estimate and responsible party. This short term implementation plan should include specific actions that implement the LCI plan, including, but not limited to:
 - a) A prioritized description of transportation improvement projects (local, state and federal) that will support the study area goals;
 - b) Description of housing strategies, particularly for affordable and mixed income housing developments, that support a job-housing match, aging in place, and efficient utilization of transportation facilities in the study area; and,
 - c) A description of the changes necessary within the comprehensive plan, zoning ordinance, development regulations or other locally adopted plans or policies to support the concept plan, including a committed schedule for adopting such changes.
- **Format of Final Deliverables:**
 - One (1) printed copy of the complete final report and appendices (8.5”x11”)
 - PDF file of Final Report and all appendices
 - The 5-Year Implementation Plan in Excel using the ARC template.
 - All electronic files in their original formats (e.g. MS Word, Excel, InDesign, etc.) with supporting graphics and GIS shape files.

EXHIBIT A-1

Jonesboro LCI Study Area

ATTACHMENT B

Compensation and Method of Payment

I. Compensation: The total cost of the Project (as described in “Attachment A”) is \$100,000. ARC’s compensation to the Subgrantee will not exceed 80 percent of the actual costs incurred. However, in no event will the total compensation and reimbursement, if any, to be paid to the Subgrantee under this contract exceed the sum of \$80,000. All costs in excess of \$80,000 are to be paid by the Subgrantee.

A breakdown of this compensation is shown in Exhibit B-1, “Budget Estimate”, which is attached to and made part of this contract for financial reporting, monitoring and audit purposes.

II. Method of Payment: The following method of payment replaces that specified in the main body of the contract.

A. Progress Payments: The Subgrantee shall be entitled to receive progress payments on the following basis. As of the last day of each month during the existence of this contract, the Subgrantee shall prepare an invoice for payment documenting work completed and costs incurred during the invoice period. This invoice shall be submitted to ARC along with the monthly report by the 10th of the following month. Any work for which reimbursement is requested may be disallowed at ARC’s discretion if not properly documented, as determined by ARC, in the required monthly narrative progress report.

Upon the basis of its audit and review of such invoice and its review and approval of the monthly reports called for in the paragraph concerning “Reports” in the main body of the contract, ARC will, at the request of the Subgrantee, make payments to the Subgrantee as the work progresses but not more often than once a month. Invoices shall reflect 100% of the allowable actual costs incurred, be numbered consecutively and submitted each month until the project is completed. Reimbursement payments from ARC shall be at 80% of the approved invoiced costs.

Subgrantee’s monthly invoices and monthly narrative progress reports are to be submitted to the ARC Director or his authorized agent and must be received by him not later than the 10th day of the following month. ARC may, at its discretion, disallow payment of all or part of an invoice received after this deadline.

B. Final Payment: Final payment shall only be made upon determination by ARC that all requirements hereunder have been completed. Upon such determination and upon submittal of a final invoice, ARC shall pay all compensation due to the Subgrantee, less the total of all previous progress payments made.

Subgrantee’s final invoice and summary document (as described in “Attachment A, Task 4 – Prepare Project Deliverables”) must be received by ARC no later than ten days after the project

completion date specified in Paragraph 3 of the contract. ARC may, at its discretion, disallow payment of all or part of a final invoice received after this deadline.

III. Completion of Project: It is agreed that in no event will the maximum compensation and reimbursement, if any, to be paid to the Subgrantee under this contract exceed \$80,000 and that the Subgrantee expressly agrees that he shall do, perform and carry out in a satisfactory and proper manner, as determined by ARC, all of the work and services described in Attachment A.

IV. Access to Records: The Subgrantee agrees that ARC, the Concerned Funding Agency or Agencies and, if appropriate, the Comptroller General of the United States, or any of their duly authorized representatives, shall have access to any books, documents, papers and records of the Subgrantee which are directly pertinent to the project for the purpose of making audit, examination, excerpts and transcriptions.

The Subgrantee agrees that failure to carry out the requirements set forth above shall constitute a breach of contract and may result in termination of this agreement by ARC or such remedy as ARC deems appropriate.

V. ARC's Designated Agent. In accordance with Paragraph 5 of the main body of this contract, ARC's Executive Director hereby designates ARC's Director of the Center for Livable Communities, as his agent ("Cognizant Center Director") for purposes of this contract only, except for executing amendments hereto.

EXHIBIT B-1

Budget Estimate

Task 1 – Existing Conditions	\$10,000
Task 2 – Market Analysis	\$15,000
Task 3 – Public Involvement	\$22,500
Task 4 – Implementation Plan	\$32,500
Task 5 – Deliverables	\$20,000
Total Cost	\$100,000
ARC Share (80%)	\$80,000
Local Share (20%)	\$20,000

* Note: The estimates listed above are preliminary and actual costs by task may vary so long as the total contract value does not increase. Any change to the budget estimates shown above must be requested in writing and approved by ARC's Cognizant Center Director.