Attachment A: Scope of Services

PHASE 1 – INITIATION

The Initiation phase quickly mobilizes stakeholders and establishes key benchmarks and a time line for the project.

Task 1.1 Work Plan: A detailed Work Plan will establish a formal time line and benchmarks for key deliverables.

Task 1.2 Public Engagement Strategy: Gould Evans will work with City Staff and key stakeholders to develop a public participation strategy specific to Joplin's planning issues, past public participation experiences, existing communication networks and constituency groups. Based on our experience on similar past projects, at a minimum we see this involving the following groups:

- *Advisory Committee* – broad cross section of stakeholders to provide general oversight, project advocacy, policy direction and general regulation review
- *Technical Committee* – a small group of those most familiar with the day-to-day administration of the City's development regulations. This group will provide technical support and direction, and perform detailed review and comment on draft regulations
- *Focus Groups/Special Issue Subcommittees* – Depending on the make-up of the Advisory Committee, and other input, special topic groups may need to be formed to provide more detailed guidance and oversight of certain topics. These groups will typically align with the Critical Issues tasks in Phases 2 and 3
- *Planning and Zoning Commission and City Council* – In addition to any role on the above committees, these groups will be provided periodic project status updates at regular meetings and their role in the official adoption process

A critical component of our public engagement strategy is outlining the different types and levels of information that each of these groups will need to perform their roles on this project.

Task 1.3 Kick-off Meetings: Outline the Work Plan and Public Engagement Strategy, identify primary objectives, establish time lines, and assign roles and responsibilities for different participants.

Consultant Responsibilities:

- Collect and review all relevant background data
- Develop detailed Work Plan
- Finalize Public Engagement Strategy
- Review all relevant planning and regulatory documents
- Conduct project kick-off meeting

Client Responsibilities:

- Provide all relevant background data, plans and reports, in electronic versions where applicable
- Assist with Work Plan and Public Engagements Strategy
- Assemble project teams (Technical Committee and Advisory Committee)
- Coordinate and schedule kick-off meetings

Meetings:

- Work Plan & Public Engagement Strategy (via conference call with Client / PM)
- Kick-off Meetings with Technical and Advisory Committee

PHASE 2 – ANALYSIS

The Analysis phase sets the foundation for the informed discussion among all stakeholders regarding regulatory strategies appropriate to achieve Joplin's' planning goals.

Task 2.1 Regulation Audit: This report will analyze specific connections between the development regulations and the Comprehensive Plan and the Economic Development Strategy. In direct response to the City's most recent policies it is important to determine what is working, what is not, what is missing.

Task 2.2 Critical Issues Summaries: These summaries provide a brief (2-6 page) white paper on the key topics identified in the Kick-off Meeting, Analysis or Regulation Audit. A typical code re-write may have five to eight of these critical issues that are most important to the success of the project and require special facilitation. This format has proven successful in getting broad input and endorsement of concepts and approaches, without getting mired in specific regulatory language. With this direction, a more "technical" group can set about the task of drafting, reviewing and revising regulations.

Consultant Responsibilities:

- Assist with selecting applicable critical issues.
- Prepare Regulation Audit
- Participate in bi-monthly project management team meetings/conference calls with client
- Prepare Critical Issues Summaries (5 to 8 anticipated)
- Present Regulation Audit and Critical Issues summaries to the Technical Committee and Advisory Committee for review and comment

Client Responsibilities:

- Provide staff list of most common regulatory issues impacting implementation of the Plan (recurring problems, past difficult project files, etc.)
- Participate in bi-monthly project management team meetings/conference calls with consultant
- Coordinate and schedule Advisory Committee and Technical Committee meetings
- Review and comment on Plan Conformance Report.
- Assist with identification and prioritization of critical issues for further analysis

Meetings:

- Technical Committee and Advisory Committee meetings on Regulation Audit and Critical Issues Summaries

PHASE 3 – DISCUSSION

The Discussion phase help builds understanding and ownership in the direction of the project.

Task 3.1 Public Open House: This is the public kick-off event. The open house, exhibits and supporting materials will have three key objectives: (1) provide clear links to the policies and priorities of the Comprehensive Plan; (2) elevate the understanding or important development concepts and potential regulatory strategies; and (3) clearly convey the physical impact that existing and potential regulations have on development and investment in the community. Discussions at this Open House will focus on high-level direction of the project and assessments of concepts. Public input from this session will be summarized for the Advisory Committee to consider.

Task 3.2 Critical Issues Workshop: Some issues require a more in-depth discussion with stakeholders and those impacted by potential regulatory strategies. The Critical Issues Summaries will provide a foundation for these discussions. The format of these discussions may include sub-committees, focus groups, or special invites to defined constituencies, but will depend on the issues selected in the Analysis phase and on the final Public Engagement Strategy. Either 2 separate workshops, or a 2-day event of public open houses and focus groups (or comparable event(s) in time and meeting preparation) may be incorporated based on the final Public Engagement Strategy.

Task 3.3 Draft Regulation Framework: Based on the outcomes of these initial public engagement tasks, a Draft Regulation Framework will be created. It will be an annotated outline of the subdivision and zoning regulations identifying: (1) areas in need of change—new provisions that are needed or old approaches that do not align with current policies; (2) areas to maintain in current form; and (3) areas to revise and amend, but keep the substantive provisions and intent the same.

Consultant Responsibilities:

- Prepare materials and facilitate Public Open House.
- Prepare materials and facilitate Critical Issues Workshop(s)
- Prepare Draft Framework (with Technical Committee and/or Advisory Committee and incorporated into Critical Issues Workshop events)

Client Responsibilities:

- Assist with Public Open House and Critical Issues Workshop(s)
- Review and comment on Draft Framework

Meetings:

- Public Open House
- Critical Issues Workshop(s) / Focus Groups
- Technical and Advisory Committee meetings on Draft Framework

PHASE 4 – INITIAL DRAFTS

The Initial Draft will be the first point in the project to review in a comprehensive perspective the many regulatory strategies and concepts that have been discussed with the project to date.

Task 4.1 Initial Draft: Based on the input from the Analysis phase and the Discussion phase, our team has the ability to craft specific regulatory strategies appropriate to Joplin. We will prepare an initial draft of the development regulations that best implement the Joplin Comprehensive Plan.

Task 4.2 Special Issue Sub-committees/Interim Drafts: Typically the drafting process involves at a minimum an Initial Draft and a Final Draft to be reviewed by the Technical Committee and Advisory Committee. Additionally, past projects have proven that an "Interim Drafts," refining technical issues and reviewed by staff, a technical committee or a special topic sub-committee is often necessary. Interim Drafts are usually topic specific or focused on things that have been the most contentious in the Critical Issue Discussion. This "three tiered" approach to drafts and reviews can result in more streamlined review and comment process. It focuses attention on the correct details for the correct people, and organizes the efforts of groups who may not want to be bogged down by the overall code or may have special interest in an issue. It also respects the time commitments of many individuals who volunteer time to this significant effort.

Task 4.3 Review and Comment Period: The Initial Draft and any necessary Interim Drafts are vetted through a review and comment period. Typically this involves only the Technical Committee, Advisory Committee, and any necessary subcommittees. Following delivery of the documents, a two- to three-week period is typically necessary for these groups to consider the documents and provide feedback.

Consultant Responsibilities:

- Prepare Initial Draft of the regulation update
- Participate in project management team meetings/conference calls with client
- Prepare Executive Summary/Status Reports for Planning and Zoning Commission and City Council
- Conduct Initial Draft discussion meeting with Technical and Advisory Committee
- Develop review and comment process open for Technical Committee and/or Advisory Committee.
- Assist in the identification and preparation of any interim drafts necessary

Client Responsibilities:

- Give consultant direction and/or provide supporting research for interim drafts.
- Participate in project management team meetings/conference calls with consultant
- Participate in Technical Committee review and comment process and provide direction
- Provide one consolidated set of review and comment notes from the Technical Committee on the Initial Draft and any necessary Interim Drafts

Meetings:

- Technical and Advisory Committee meeting on Initial Draft
- Conference Calls with PM and/or Technical Committee in any interim drafts.

PHASE 5 – FINAL DRAFT

The Final Draft is the first professional recommendation of the consultant team on regulations appropriate for the City of Joplin.

Task 5.1 Final Draft: Using the input gained from the review and comment of the Initial Draft we will prepare the Final Draft of the development regulations. Much of the text is nearly finalized, allowing us to develop detailed graphics to support the text, and finalize formatting.

Task 5.2 Review and Comment Period: Similar to the Initial Draft phase, the Final Draft is available for a second round of review and comment by the Technical Committee and Advisory Committee.

Task 5.3 Public Open House/Public Official Work Session: The Final Draft also provides a good opportunity to reveal the full set of regulations to the general public. “Executive summaries” and “How to Use” guidance will be created to orient people to key regulatory strategies. Additionally, this same information will be presented at a joint work session of the Joplin Planning and Zoning Commission and City Council. It is important that this first introduction of a complete draft be presented in an informal setting outside of the official public hearing process. This will enable a better understanding of what is changing and why, and still allow time for feedback and adjustment.

Consultant Responsibilities:

- Review and evaluate comments from the Initial Draft review process
- Finalize format and layout of regulations, and prepare final graphics
- Prepare Final Draft of development regulations based upon Phase 4 input
- Review Final Draft of regulations with Technical Committee and Advisory Committee
- Hold one public open house or other stakeholder review on Final Draft
- Conduct Final Draft work sessions with the Joplin Planning and Zoning Commission and City Council

Client Responsibilities:

- Provide direction on final format and layout of the regulations
- Assist in coordination of review and comment process with the Advisory Committee and give direction on the proposed drafts
- Provide one consolidated set of review and comment notes from the Technical Committee on the Final Draft

Meetings:

- Technical and Advisory Committee meetings on Final Draft
- Public Open House – Final Draft
- Joint Planning and Zoning Commission/ City Council Work Session

PHASE 6 – ADOPTION

The Adoption Phase provides the official review and comment process, and allows formal adoption of the new development regulations.

Task 6.1 Adoption Draft: The Adoption Draft will incorporate comments from the discussion and review of the Final Drafts of the regulations. This draft will enter the formal review and comment process.

Task 6.2/6.3 Planning and Zoning Commission Hearing: Our team will support up to two meetings for the adoption process, which is anticipated to be a public hearing before the Joplin Planning and Zoning Commission, and official adoption by the City Council. Additional meetings can be accommodated

through additional services, or the Consultant can support staff with information and advice for additional meetings

Consultant Responsibilities:

- Review and evaluate comments from the Final Draft review process
- Prepare proposed Adoption Draft regulations based on Phase 5 input
- Prepare Executive Summary
- Present Adoption Draft of regulations at formal public hearings and meetings
- Prepare Publication Copy of formally adopted regulations

Client Responsibilities:

- Direct consultant on all officially adopted changes to the adoption drafts that resulted from the formal public review process
- Coordinate distribution of all review and meeting materials
- Coordinate scheduling of all public hearings and meetings

Meetings:

- Planning and Zoning Commission Hearing
- City Commission Formal Adoption
- Final adopted deliverable

Proposed Fee

The proposed fee is a lump sum fee based on the RFP and proposed scope of services. It is negotiable in any manner that best meets the needs of the community and the budget and priorities of the City. As a continuing service to our clients Gould Evans offers technical support for the initial year after adoption of the code. This includes up to 60 hours of on-call assistance with staff for interpretation issues, plan review and application, or other similar issues.

Phase	Fee
Phase 1: Initiation	$ 5,300.
Phase 2: Analysis	$ 14,500.
Phase 3: Discussion	$ 19,500.
Phase 4: Initial Draft	$ 33,800.
Phase 5: Final Draft	$ 21,300.
Phase 6: Adoption	$ 7,400.
TOTAL FEE	**$101,800.**

Proposed Schedule

