

# Town of Addison Special Study: Sam's Club Site and Surroundings

---

## Draft Scope of Services

May 1, 2014

This Scope of Services relates to the special study site identified by the Town of Addison. It includes the 17.34 acre site of the Sam's Club site on the south side of Belt Line west of Midway Road. This is Parcel 3-D in the Town's Comprehensive Plan land use analysis by sector. It also includes two additional sites south of Beltway Drive, the McCutchin mixed use center and the Office in the Park garden office complex.

The proposed fee is shown for each phase and is totaled for all phases at the end of this draft scope. Services will be provided by Strategic Community Solutions, LLC, Jacobs, Inc. and Ricker Cunningham.

## PHASE I – PROJECT MANAGEMENT

### Task 1 - Project Initiation

1.1. *Project Initiation Meeting (1 Meeting)* - The SCS/Jacobs Team will conduct a kick-off meeting to discuss our understanding of the project, the project schedule and scope, as well as to receive data from the Town of Addison as detailed under Task 4. Recommended attendees include key Town Staff members who will ultimately guide the study's progress. The Town will provide a meeting location and will notify attending staff of the location and time for the meeting.

1.2. *Tour* – Immediately following the kickoff meeting, the SCS/Jacobs Team will tour the study area with Town Staff to gain a deeper understanding of the current site conditions and character of adjacent developments. The tour is expected to last approximately one hour.

### Task 2 – Project Coordination

The SCS/Jacobs Team will hold four (4) Progress Meetings with Town Staff during this project. These meetings will occur via WebEx (an internet application that allows virtual meetings) with key Town staff to discuss project progress, key action items and responsibilities, and project schedule. Jacobs will prepare an agenda and a checklist with action items, responsibilities and due dates for appropriate team members, and will schedule and notify attendees of the meetings via e-mail. These meetings will occur prior to each of the three committee work sessions described below, and once more after the final committee work session.

### Task 3 – Work Session Logistics

3.1 *Work Session Arrangements* – Each work session will be held in a facility arranged by the Town, and Town staff will be responsible for notifying participants. The SCS/Jacobs Team will develop the

agenda for the meeting, and will provide all necessary materials to facilitate the discussions with meeting participants.

3.2 *Work Session Results Reports* – Following each work session, the SCS/Jacobs Team will prepare a brief synopsis that records the decisions reached at the work session and key aspects of the direction provided to the team during that discussion.

**Phase I proposed fee = \$13,653**

## **PHASE II – STRATEGIC ASSESSMENT SESSION**

### **Task 4 - Data Collection**

The SCS/Jacobs Team will review existing background data and previous plans that include this study area. This review is intended to form the foundation for discussion of the study area's opportunities and potential during the Strategic Assessment Session. The following are materials that will be requested for use by the SCS/Jacobs Team:

- Aerial photographs.
- Regulatory documents - comprehensive plan, zoning map and ordinance, and any other regulatory documents that apply to the study area.
- Other relevant previous studies and reports.
- Relevant land use and development data.
- Existing appraisal district data.
- Information regarding planned future development.
- Existing and planned utility / infrastructure improvements.
- Existing and planned transportation improvements, including the most recent traffic counts available for the area.

### **Task 5 – Mapping**

5.1 The SCS/Jacobs Team will prepare a project base map that will be used as the base for maps and diagrams of the study area created during this project. This map will rely on GIS data from the Town and will focus on information that is relevant for revitalization of the site.

5.2 The Town and the consultant team will determine the extent of adjacent area that is important to analyze in terms of the context for this site's future development and the desired connectivity between this future development and other parts of the Town.

5.2 The SCS/Jacobs Team will create a map (or set of maps) that depict key information about the site and its adjacent area relevant for redevelopment or reuse of the site. The background conditions information will be based upon the available GIS data to be provided by the Town, including:

- Existing Development Pattern – may include building footprints, property lines, land cover, land use, zoning, and historic features (if any).
- Existing Transportation Systems – may include curb lines, street centerlines, rail and bus information (routes, lines, stops, stations, facilities, etc), pedestrian paths and sidewalks, and bike routes.
- Existing Utility Infrastructure (Water and Wastewater) – may include locations, alignments and capacities of water, wastewater, storm drainage, electrical, gas, fiber optic cable and other infrastructure.

- Natural Assets – may include topography, lakes and streams, floodplain, parks and open spaces, other environmental features, trails and other recreational facilities.

## **Task 6 – Review of Demographics and Market**

The SCS/Jacobs Team will review information provided by the Town and will gather additional data (as necessary) to support the creation of realistic development alternatives for the study area. The following will be reviewed and/or gathered by the SCS/Jacobs Team:

6.1 *Trade Area Identification* - The SCS/Jacobs Team will determine the trade area(s) for potential land uses considering impacts from factors including: physical barriers, such as highways, major arterials, etc.; location of possible competition, both within and outside the municipal boundaries; proximity to population and/or employment concentrations; and, market factors which will set values for development. These boundary definitions will be shared with Town staff for review and comment.

6.2 *Demographic Projections* – The SCS/Jacobs Team will analyze market indicators for the trade areas, Town and region (historical and projected) including: population and household growth rates; income levels; consumer spending patterns; lifestyle characteristics (psychographics, with information to be provided by the Town); employment growth figures; and, other indicators as identified. This trade area analysis will supplement the perspectives about potential markets that the Town has developed through discussions with the development community.

6.3 *Market Supply and Demand Analyses* - The SCS/Jacobs Team will prepare a profile of supply conditions for a limited number of primary land uses. Based on this information and conclusions drawn through completion of previous tasks, we will forecast demand for proposed land uses in the trade areas and estimate market share for the study area over the near- and mid-term.

## **Task 7 – Property Owner Meetings**

The SCS/Jacobs Team will meet with the property owners of the land in the study area. These meetings are designed to understand the owners' objectives and expectations in terms of future use of the property. In addition, the SCS/Jacobs team will meet with representatives of the adjacent residential neighborhoods to understand their perspectives on the site's future. The SCS/Jacobs Team will be responsible for setting the agenda for the sessions. The Town will be responsible for planning meeting locations, contacting the property owners and scheduling the meetings. Four meetings are anticipated.

## **Task 8 – Strategic Direction for the Study Area**

Based on the analysis described above, the SCS/Jacobs Team will identify a preliminary set of strategic direction topics related to the study area's future. These topics will be used to structure the committee work session, and will help frame the strategic choices related to the study area.

## **Task 9 – Committee Work Session: Strategic Assessment**

The SCS/Jacobs Team will structure and manage a half-day work session with the committee. The topics for presentation and discussion are expected to include:

- Assessment of the site based on the research conducted in earlier tasks.
- Strengths, weaknesses, opportunities and threats that affect the viability of future development options for the site.
- Development alternatives that could be considered in the event of the site's redevelopment.

- Preferred design concepts, discussed through the use of prototypical images of comparable developments.
- The desired role this site should play in achieving the Town's overall strategic objectives.

The work session should result in agreement on the Town's key strategic objectives for any redevelopment or revitalization of the site and direction to the consultant team about development options that should be included in a preliminary set of two or three development alternatives for the study area.

**Phase II proposed fee = \$27,431**

## **PHASE III – DEVELOPMENT ALTERNATIVES SESSION**

### **Task 10 – Creation of Development Alternatives**

Based on the direction received at the Committee Work Session, the SCS/Jacobs Team will develop two or three development alternatives for the study area. Each of these will reflect a different response to the market opportunities identified previously and the Town's strategic objectives for the area. The development alternatives will show general scale, location and massing of buildings; a range of potential land uses; public spaces within the study area; and connectivity between the study area and the surrounding community. They will be described in sufficient detail to permit pro forma analysis of the alternatives' economic and fiscal impacts. Prototypical images will be used to describe the character of urban form represented by each alternative.

These alternatives will be reviewed with Town staff before analysis begins.

### **Task 11 – Review Draft with Development Community**

The SCS/Jacobs Team will meet with up to three representatives of the development community to share these conceptual development alternatives and obtain feedback as to the likely interest from developers for each alternative. The Town and the SCS/Jacobs Team will work together to identify developer representatives who are familiar with the mix of anticipated products and experienced in providing the style and intensity of development anticipated.

### **Task 12 – Analysis of Development Alternatives**

Development alternatives analysis will focus on five major issues:

12.1 *Strategic Objectives* – A matrix will be used to rate each development alternative according to its contribution to the Town's strategic objectives defined in the first work session.

12.2 *Physical Development Compatibility* – Using the mapped information, each alternative will be evaluated to determine whether there are physical constraints to its success. The ability of existing infrastructure to accommodate the alternative's development will also be assessed and the need for any new infrastructure identified.

12.3 *Urban Form and Character* – The alternatives will be evaluated in terms of their ability to provide public spaces, connections and other aspects of urban form desired by the Town.

12.4 *Resilience Assessment* – Assessment of the development alternatives will provide a qualitative understanding of the extent to which each alternative contributes to the long-term success of the Town. Issues include the use of sustainable design and development techniques, the alternative's flexibility and ability to adapt to changing market demands over time, and the alternative's resilience in responding to

larger changes related to issues such as energy, transportation, climate, infrastructure design and communications.

12.4 *Economic and Fiscal Impacts* – An economic analysis will address project revenues; development costs; operating expenses; and economic return (both public and private). Using these assumptions, the Team will prepare 10-year development pro formas designed to quantify the magnitude of “gaps” in the financial feasibility of the development alternatives.

### **Task 13 – Committee Work Session: Development Alternatives**

The SCS/Jacobs Team will structure and manage a half-day work session with the committee. The topics for presentation and discussion are expected to include:

- Report on the results of the discussions with the development community and alternatives analysis.
- Discussion of the implications of these alternatives for the Town.
- Direction for alternatives refinement to create a preferred alternative.

The work session should result in agreement on a preferred development alternative that offers the best response to anticipated market trends and Town objectives. The work session should also provide the SCS/Jacobs Team with direction to refine a preferred alternative for potential discussion with the development community and public.

**Phase III proposed fee = \$35,144**

## **PHASE IV – DESIGN & DIRECTION SESSION**

### **Task 14 – Draft Preferred Development Plan**

The SCS/Jacobs Team will develop a Draft Preferred Development Plan for the study area depicting proposed changes in the site's uses and character (supported by prototypical images). The Plan will be supported by data related to existing and future amounts of each land use type within the study area. The Plan will also depict anticipated changes to pedestrian and vehicular circulation and other infrastructure demands.

### **Task 15 – Committee Work Session: Design and Direction**

The SCS/Jacobs Team will structure and manage a half-day work session with the committee. The topics for presentation and discussion are expected to include:

- Review of the Draft Preferred Development Plan.
- Direction to the SCS/Jacobs Team for plan refinements.
- Direction regarding implementation priorities.
- Discussion of next steps for the Town.

The work session should result in agreement about a preferred development plan for the study area. It should also result in committee recommendations to the Town about the next steps to take regarding this site.

The Town's next steps could vary greatly, depending on the results of this analysis. On the one hand, the next steps could involve initiation of meetings with the property owners, development community

and local residents to consider changes in the Town’s zoning and development requirements for the study area and the creation of new design standards or guidelines for future development. On the other hand, the next steps could simply entail the Town’s decision to keep these results on file as background information for review of future proposals for the study area, should any be made. This work session will be the forum for discussion of appropriate next steps.

**Phase IV proposed fee = \$16,562**

## **PHASE V – STUDY COMPLETION**

### **Task 16 – Final Report Preparation**

The SCS/Jacobs Team will provide a final report to the Town with the results of this study. The report will present the Preferred Development Plan and will summarize the factors supporting this development pattern. The report will describe the Town’s next steps and any anticipated timeline for action. One paper copy of the final report will be provided to the Town, along with digital copies of the report and other material prepared during the study.

**Phase V proposed fee = \$11,209**

## **SUMMARY OF FEES**

<b>PROJECT PHASE</b>	<b>PROPOSED FEE</b>
PHASE I - PROJECT MANAGEMENT	\$ 13,653
PHASE II - STRATEGIC ASSESSMENT SESSION	\$ 27,431
PHASE III - DEVELOPMENT ALTERNATIVES SESSION	\$ 35,144
PHASE IV - DESIGN & DIRECTION SESSION	\$ 16,562
PHASE V - STUDY COMPLETION	\$ 11,209
<b>TOTAL PROJECT</b>	<b>\$ 104,000</b>