



Carlisle | Wortman
ASSOCIATES, INC.

**Proposal for Planning
&
Planning and Zoning Services
Cohoctah Township**

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Planning & Zoning Services

Cohoctah Township

Introduction

Carlisle/Wortman Associates, Inc. business philosophy is to establish ongoing and long-term relationships with our public sector clients. However, just like our clients, we are constantly growing and evolving to address modern day challenges. Always aware of the issues that face our individual communities, we can customize our wide range of services to meet their personal goals. As a result, we pride ourselves on serving numerous communities for periods extending over 30 years.

The core of our business has been providing the types of services needed by communities on a day-to-day basis. As such, we understand from our experience that the Township seeks a firm capable of serving many roles. We have the full in-house capability to provide the services requested by Cohoctah Township as set forth in the Request for Proposal.

More specifically, our staff is well-versed in a variety of services, which include:

Planning/General Consultation: We will provide day-to-day consultation to municipal staff regarding issues relating to Zoning Ordinance regulations, future land use, site issues, state regulations and other legislative responsibilities.

Development Review: We will review all development proposals upon request such as site plans, rezoning, special land use requests, PUDs and other matters related to zoning compliance.

Meeting Attendance: We can attend all Planning Commission, Zoning Board of Appeals, and Township Board meetings, as requested.

Variance Reviews: When requested, we provide reviews of variance requests and attend Zoning Board of Appeals meetings.

Ordinance Amendments: From time to time, the Township Ordinance needs to be revised. In most cases, our office prepares the draft language, working closely with the Township Attorney, staff, and Planning Commission.

Education and Training: We view education as a continuous process. Our website posts planning articles on topics of interest to our clients. Please see our blog at

www.cwaplan.com/blog. We make our clients aware of changes in legislation and new planning techniques. Included in our retainer, we provide an annual training session either to the Planning Commission, Zoning Board of Appeals, Township Board of any combination thereof on basic planning and zoning. The

topic can be customized based on client interest. Though we host annual training sessions, we view education and training as part of our ongoing responsibility.

Master Plan: We have prepared and updated over 100 Master Plans over the past thirty years, ranging in size of communities from with a population of 350 to over 80,000. We have prepared Master Plans for communities with similar characteristics to Cohoctah Township in Livingston County.

Cohoctah Township's Township Planner position exists for several important reasons:

1. Implement the policy direction of the Township Board in an efficient and responsive manner.
2. Advise Township on matters affecting the Township.
3. Administer, assist and oversee Township planning operations.

The role of Cohoctah Township's Township Planner can be summarized as an individual responsible for: providing planning and zoning direction, supervision and coordination of general operations of the Township by working directly with the Supervisor, Township Board, Township Planning Commissions, Zoning Board of appeals and residents; formulation of appropriate Township policies and procedures; coordination of potential and current commercial development serving Cohoctah and the surrounding communities, on matters effecting the Township and the Livingston County area.

Knowing that Cohoctah Township has a unique rural culture and specific requirements and preferences, Carlisle/Wortman Associates Inc. (CWA) is pleased to provide a comprehensive and customized proposal for Township Planner. We are fully qualified to provide these services which include professional support and assistance within Cohoctah encompassing the needs of the Township Board, Township Planning Commission, ZBA and Township staff and residents.

The Staff Planner:

- Work closely with the Township Zoning Administrator and Board and function as the agent and arm of Cohoctah Township regarding planning administration and land use permits.
- Furnish the Township Board with information regarding the Township's affairs and prepare and submit such reports as may be required.
- Attend Township Board, Planning Commission and Zoning Board of Appeals meetings as requested.

- Offer our services and knowledge of Township government functions to address design, format, and frequency of reports, forms, letters, and correspondence.
- Participate in the development and implementation of Township goals, objectives, policies, and priorities.
- Provide professional and courteous interaction with residents and other applicable agencies - both internal and external.
- Communicate effectively, both verbally and in writing, using advanced interpersonal skills.
- Oversee technical operation within all phases of development.
- Review and make recommendations to Township Board and Zoning Administrator.
- Work with other staff and the contractors to develop remedies for code violations, if requested.
- Provide leadership and continual development and use of effective strategies and interpersonal styles to engage and guide others toward identified objectives and goals in the best interest of the Township and community.
- Perform other duties as assigned by the Township Zoning Administrator, Board and Supervisor.

Fees

We understand the need to provide an economical incentive to provide planning and zoning services. Our experience has been that we can operate at a considerable savings. We will work closely with the Township to explore every option to reduce cost.

The following option outlines our rates for work proposed. Some of our clients prefer to be billed for services strictly on an hourly basis, while others prefer a more structured fee schedule for specific services. We also find that the establishment of a monthly retainer is useful for budgeting purposes.

We can continue this proposal if the Township wishes until the Board decides otherwise. If the Board decides to move in a direction of a full time professional, we will assist with the hiring and training of any new planning and zoning staff well.

Retainer

Under a monthly retainer of \$1,000 we propose the following services to be provided to Cohoctah Township:

- Constant availability via phone, email or other electronic means in order to respond to residents and others.
- Attendance at Planning Commission and Board meetings as needed.
- **Conducting a yearly free of charge training workshop appropriate for Township elected and appointed officials.**
- All mileage, benefits, overhead and expenses.

Planning Services

Carlisle/Wortman Associates, Inc. is well prepared and equally enthused to conduct the scope of services and service specifications described in the Request for Proposal: Planning Services. Since 1987, Carlisle/ Wortman Associates Inc. has been providing public sector clients with professional planning services. Our experienced professionals are forward thinking, experienced and accomplished at finding sound and creative strategies to fit our clients' needs. Our core service is to function as an expert and extension of the Township with the goal of building strong, attractive, and more livable communities. Our continuing success is a direct result of the philosophy to which we adhere: responsiveness, commitment, trust, and success.

We have been exclusively servicing Michigan for over thirty years. With a commitment to public service, we only provide services for governmental and non-profit entities ranging from townships, villages, cities, and counties to community development organizations and public transit agencies. We take pride in the fact that Carlisle/Wortman Associates does not represent private developers, as we believe this creates a conflict of interest. The firm currently serves 75 clients, the majority of which are centered on continuing planning services. A principal of the firm personally represents each client.

CWA has a long-standing relationship with communities in Livingston County and Southern Michigan providing planning consultation services since 1981. We currently represent numerous nearby communities.

We are familiar with Cohoctah Township due to the service we provide to other communities in the vicinity. We are aware of the varied land use within the Township and the Township's desire for balanced growth.

Cohoctah Township can rely on CWA for:

Responsiveness

We believe in constant contact with our clients via telephone, in person meetings, email, and mobile communication and at hours beyond standards business practice.

Commitment

We have been working with client communities for as long as 30 years.

Trust

We cherish long-term client-consultant relationships built by listening intently to client needs, maintaining clear and frequent contact, providing timely and responsive service, and exceeding expectations.

Success

We equip our clients for success by sharing our expertise, leadership, and creativity while educating communities to ensure successful solutions.

FEES

The fee schedule has components for monthly retainer, hourly rates, plan reviews, training and specialized studies. The first component is a monthly retainer as described earlier responding to regularly scheduled evening meetings. The second component is an hourly rate schedule for assignments outside of the monthly retainer. Please note that CWA will negotiate another payment method for single-use assignments such as a design concept or development analysis. Please note that for any option, our costs for development review and private initiated actions can be costs borne by the applicant. If desired, we can work with the Township to establish a development review fee schedule to pass along our costs to the applicant. Our current development review fee schedule will be provided upon request.

MUNICIPAL CONSULTATION RATES

<u>Personnel</u>	<u>Hourly Rate</u>
Principal	\$125.00
Senior Associate	\$115.00
Associate	\$110.00
Community Planner/Landscape Architect	\$100.00
Graphics (GIS) Technician	\$85.00
Support Staff	\$70.00
<u>Expenses</u>	<u>Rate</u>
AutoCAD Operation	\$25/hr.
Supplies, Prints, Mailing	cost + 20%