



May 31, 2024

Ms. Shaniqua (Shan) Rose  
Town of Eatonville CRA Director

**Scope of Services -DRAFT**  
**Professional Planning Services for Eatonville CRA Plan Update**  
**GAI Project: R240806.00**

Dear Ms. Rose,

GAI Consultants' Community Solutions Group ("GAI" or "CSG") is pleased to submit this Proposal to the Town of Eatonville ("Client") for an update to the Town of Eatonville Community Redevelopment Area ("CRA") 2105 Plan. This Proposal outlines the scope of work and costs based on our understanding of the assignment.

**Understanding**

The proposed scope of work is based on the following understanding of the items listed below:

1. Plan Background and Timeframe:

- The Town's CRA Plan was adopted in 1997 in the Orange County Ordinance number 97-M-14. In 1997, the original redevelopment plan was intended to be a strategic plan for the subsequent fifteen years with the primary objective of building the infrastructure needed to support a themed community concept. The plan included four redevelopment goals: 1) to Develop guidelines for Eatonville's proposed themed development, 2) To create unified leadership and direction, 3) to Attract and accommodate new businesses, and 4) to Create an attractive and viable sense of place.
- In 2015, building on the base of the 1997 plan, CSG created a CRA Plan Update Document, which was never approved or adopted. The 2015 Plan identified five themes/goals, which are: 1) Creating a quality sense of place, character, and image, 2) Developing high-performance infrastructure, 3) Reinforcing a place that embraces history, culture, and education, 4) A connected town, and 5) a place that is attractive to business and economic opportunity.
- Because the 2015 plan was never approved and adopted, the timeframe was not extended, and the original 1997 (the current plan) will sunset on January 1st, 2027; therefore, as a first step, CSG recommends beginning discussions with Orange County about extending the CRA operational timeframe. These discussions are crucial to determine the County's willingness to extend the CRA. Maintaining this successful and mutually beneficial partnership is one of the key objectives before, during, and after the CRA Plan Update. This early coordination with the County may also influence whether and how the CRA proceeds with the Plan Update. Specifically, suppose preliminary discussions with Orange County indicate an unwillingness to consider the potential extension of the CRA for approval. In that case, the subsequent activity of updating the CRA Plan is significantly impacted.

2. Scope Outline:

- Based on the information provided above, CSG recommends splitting the scope of work into two parts. Part 1 involves seeking a CRA timeline extension and plans review, while Part 2 involves updating the plan. Below is the proposed scope outline.
  - Part 1: CRA Timeline Extension & Project Coordination *(All these tasks will continue through Part 2 of the scope)*
    - Task 1: CRA Extension Coordination with County
    - Task 2: Meetings and Project Coordination
    - Task 3: Plans Review
    - Task 4: On-Call Planning Consultation
  - Part 2: CRA Plan Update *(contingent on the County's decisions)*
    - Task 5: Initiation
    - Task 6: Assessment and Evaluation
    - Task 7: Market Assesmet
    - Task 8: CRA Plan
    - Task 9: Working Group and CRA Board Meetings

3. Contracting and Procurement:

- The Town will utilize Orange County Contract #Y22-143B for Professional Planning Services. Please note that CSG will need to follow all the terms and conditions outlined in this contract, including meeting SBE/WBE requirements. Therefore, adding other consultants may be required and not included in this scope of work. The Town also has the option to implement its own procurement process.

4. Community Engagement:

- The Town prefers not to conduct public meetings for the CRA plan update due to significant public engagement already conducted through other processes, such as the Town's Master Plan, FEMA Plan, Vision Zero Plan, and EPA R2P2 Technical Assistance, among others.

5. Project Timeline:

- Part 2 of the project will begin after Orange County agrees to extend the CRA, the Town Master Plan Process is 90% complete, and the EPA R2P2 Technical Assistance final report has been delivered.

## **Scope of Outline**

### **Part 1: CRA Timeline Extension & Project Coordination**

This first part can commence once the Client and CSG have an executed contract. All tasks performed in Part 1 will be billed hourly, not to exceed the agreed limit, until CSG receives written notification and approval from the Client. All these tasks will continue through Part 2 of the scope.

#### **Task 1: CRA Extension Coordination with County (Hourly)**

CSG can assist the Town staff by coordinating and preparing comprehensive meetings with Orange County staff to discuss the extension of the CRA timeframe. This extension would potentially prolong the CRA's duration, moving the sunset date to 2057. CSG's support will include organizing these critical discussions, providing necessary documentation, and ensuring that all relevant information is communicated effectively to facilitate a favorable outcome for the Town.

1. County/Town Coordination Call: During the project's lifespan, regular progress meetings with Orange County are estimated to be five (5) meetings on an as-needed basis. Additional meetings will be billed on an hourly basis.

#### **Task 2: Meetings and Project Coordination (Hourly)**

CSG will attend regular review meetings with the Client not already accounted for in *Task 8: Working Group and CRA Board Meetings*. Meetings are budgeted as hourly, not to exceed. Any meetings beyond the ones estimated below will be considered additional services.

1. Project Management Plan: CSG will create a detailed work plan and schedule, including project team responsibilities and milestones.
2. Project Initiation Meeting: CSG will prepare an in-person meeting with the Client to confirm the project scope, objectives, schedule, deliverables, team and working group members' roles, and responsibilities. The project initiation meeting will occur on the same day as the site visit.
3. Project Administration: CSG will complete general administrative tasks, including communicating and coordinating with the Client.
4. Review/Coordination Meetings: During the project's lifespan, regular progress meetings are estimated to be six (6) meetings on an as-needed basis. Additional meetings will be billed hourly.

#### **Task 3: Plan and Documents Review (Hourly)**

1. Plans Review: CSG will review and evaluate all documents pertinent to the CRA, including but not limited to the 1997 and 2015 CRA Plan, 2024 Town's Master Plan, Vision Zero Plan, and EPA R2P2 Report, among others. The intent is to have a holistic understanding of the goal and intent of all past and current plans. All these plans will help inform the 2024 CRA Plan Update vision, goals, strategies, and projects and identify what to stay in the plan and what we need to modify or update.

#### **Task 4: On-Call Planning Consultation (At-Request)**

CSG will provide ongoing design and planning consultations to the Client at request at an hourly rate for items listed below:

1. Materials (plans, narratives, drawings, memos) to justify plan extension
2. Grants Application support
3. Ongoing refinement and updating of the master plan.
4. Additional conceptual studies, alternative analysis, and detailed site plan studies for specific uses or specific parcels.
5. Any additional planning services not included in this scope.

### **Part 2: Plan Update**

Part 2, as written below, will commence after Orange County makes a verbal or written commitment to extend the CRA timeframe.

#### **Task 5: Initiation**

To kick off the project, CSG will work with the Client on all the items outlined below.

2. Site Visit and Visual Documentation: Concurrent with the Project Initiation Meeting and under the Client's guidance, CSG will tour the CRA area and create photo documentation to help inform the area assessment (*See Task 6: Area Assessment & Evaluation*). The primary purpose will be to document the overall character and image of the areas (residential, East and West Kennedy, Civic Center, etc.) streetscape, gateway elements, parks, and open space, among other physical elements, to help inform the physical assessment and evaluation of the CRA. The area visual documentation and takeaways will be included in the deliverable for *Task 6: Area Assessment & Evaluation*.
3. Working Group Formation Strategy: CSG recommends that the Client create a Working Group for the project to help guide the planning process. This group will be comprised of town staff and leadership, neighborhood groups, business owners, landowners, and other organizations or community members interested in the town's and CRA's future. The committee will help guide, validate ideas, and make recommendations regarding the CRA's vision and plan. The intent is to meet with the Working Group at different project stages.
4. Data and Information Gathering: CSG will work with the Client to collect all plans, reports, imagery, and available data (GIS or other) pertinent to the project.

#### **Task 6: Assessment & Evaluation**

Concurrent with some of the items outlined in *Task 5: Initiation*, CSG will conduct an area assessment and evaluation to help inform the CRA Plan Update.

5. Policy Review: CSG will complete a review of current zoning, land use, regulatory/code language, and programs and incentives that affect the redevelopment of the area.

6. Demographics: CSG will gather and analyze the demographic and socio-economic characteristics of the CRA and City, or CSG can use the demographic data collected as part of the Town's Master Plan.
7. Map/Project Inventory and Parcel Characteristic Analysis: CSG will map and inventory all past, current and future projects, as well as the existing urban conditions, zoning, existing land use, future land use, street network, parks, and open space, wetlands, conservation, natural systems, and infrastructure (utilities, parking, and stormwater), and other elements if relevant. CSG will create a parcel characteristics analysis (Vacancy, Ownership, New Development Permits...etc), all subject to the availability of GIS or other data from the City or other agencies.
8. Opportunities and Constraints Map Series: Based upon the above-described review and map inventory, CSG will develop a series of opportunities and constraint maps, which may include but are not limited to 1) Area Character and Image, 2) Access and Connectivity, 3) Stormwater and utilities (based on data or information availability), 4) Parks and Open Space, 4) Initial Identification of Potential Redevelopment sites and 5) Projects.
9. Area Assessment & Evaluation Documentation: CSG will compile the items listed under this task in a report. The deliverables will take the form of tables, memos, graphs, or others as appropriate to the output involved, summarized into a report with proper documentation.

## **Task 7: Market Assessment**

CSG will prepare a Market Assessment that will include the following:

1. Market Conditions: Concurrent with *Task 6: Area Assessment & Evaluation*, CSG will analyze the current economic conditions of commercial and residential markets that shall address the following:
  - a. Business and employment will include business by type, amount of commercial floor space occupied and vacant, cost to lease/rent retail floor space, and unemployment rate.
  - b. Residential dwelling units are to include the number of single-family and multi-family, amount occupied, owner-occupied and renter-occupied, vacancy rate, median dwelling unit value, and cost to rent.
2. Market Potential: Concurrent with *Task 8: CRA Plan* CSG will create an analysis of market potential that may include, but not be limited to, gap analysis and potential development opportunities for commercial and residential markets within the CRA. Potential development opportunities shall be based on current demographic and land use data. They shall assess a fifteen (15) year future growth projection of commercial and residential uses.
3. Market Assessment Report: CSG will create a report containing tables, memos, graphs, or others as appropriate to the output involved, summarized into a report with proper documentation.

### **Deliverables:**

- Market Assessment Report (PDF Format)

## Task 8: CRA Plan

After completing the Area and Plan Assessment and Evaluation, CSG will work hand-in-hand with the Client and Working Group on the creation of a CRA Plan Update. Four (4) Working Group meetings will occur concurrently with this task; *see Task 9: Working Group and CRA Board Meetings*. The CRA Plan Update work will be performed in five (5) steps outlined below:

1. Visioning and Frameworks: CSG will utilize the Town’s Master Plan Elements as a base to create the CRA Plan Vision and Frameworks described below.
  - a. Vision Statement & Guiding Principles: CSG will develop a vision statement and a series of guiding principles that describe the CRA's future goals and act as an umbrella for the goals/big moves and actions that are developed.
  - b. Goals / Big Moves: CSG will create a series of goals / big moves. The goals will outline the key actions the CRA will take to execute the vision. The actions will be organized into the following types: 1) policy (code & regulations), 2) organizational (administrative & program), 3) funding, and 4) physical improvement (development, public realm & infrastructure).
  - c. Framework Plans: CSG will create a series of framework plans to help support the big moves.
2. Capital Projects and Program: CSG will identify potential redevelopment sites and projects.
  - a. Vision-based Concept Plan: CSG will create a vision plan to illustrate the potential for future redevelopment in the public realm and infrastructure projects. The concept plan will help inform the selection of the catalyst sites. CSG will deliver one (1) illustrative plan rendering.
  - b. Renderings: CSG will deliver up to 3 (three) renderings, one (1) birds-eye view, and two (2) street-level views of some of the proposed projects.
3. Implementation: CSG will create a summary implementation plan with the goals and actions. The actions will have a timeframe and be organized by type and implementation level (basic, progressive, and transformational). CSG will prepare a 5-year capital improvement program (CIP) for the CRA, increment revenue projections for the CRA through the sunset date at 5-year increments, and initial budgets for program implementations.
4. Draft Plan: CSG will deliver a draft plan document with up to three (3) revisions. The report will contain tables, memos, graphs, diagrams, and renderings or others as appropriate to the output involved.
5. Final CRA Plan: CSG will deliver a Final CRA Plan Document. CSG will compile, summarize, and address the Clients, Working Group, and Board Members and create a Final Plan Document.

### Deliverables:

- Draft CRA Plan (PDF Format)
- Final CRA Plan (PDF Format)

## **Task 9: Working Group and CRA Board Meetings**

CSG will prepare, attend, and conduct up to four (4) Working Group Meetings and two (2) CRA Board meetings.

1. Working Group Meetings: CSG will prepare, attend, and conduct up to four (4) in-person Working Group meetings. These meetings intend to present progress updates and gather input from the group members for the CRA Plan Update.
  - a. Meeting #1: Project Kick-Off and Area Understanding: Concurrent with the Site Visit (See Task 1: Initiation Item 4), CSG will prepare and facilitate an in-person meeting. At this first meeting, CSG will introduce the project and set expectations. This first meeting intends to gather initial input from the group about the CRA's current vision, goals, projects, programs, and design standards.
  - b. Meeting #2: Assessment & Evaluation: CSG will present the area and market assessment findings. The meeting will start with a presentation followed by a facilitated group discussion.
  - c. Meeting #3: Vision and Projects: CSG will present the CRA Vision, Frameworks, Concept Plan, and Potential Projects. The meeting will start with a presentation followed by a facilitated group discussion.
  - d. Meeting #4: Draft Plan: CSG will present the Draft CRA Plan. The meeting will start with a presentation followed by a facilitated group discussion.
2. CRA Board Meetings: CSG will attend up to two (2) CRA Board Meetings to present the Draft and Final Plan to the Board Members.

## **Schedule**

GAI will refine the schedule and sequence of events with the Client and work towards a mutually agreed-upon schedule with benchmarks for each Task. We anticipate that Part 1 will take three to four months and Part 2 will take six to nine months.

## **Compensation**

Compensation for services rendered by GAI will be paid on a lump sum or hourly basis, as indicated below.

<b>Tasks</b>	<b>Description</b>	<b>Term</b>	<b>Fee</b>
<b>Part 1: CRA Timeline Extension &amp; Project Coordination (Hourly)</b>			
1	CRA Extension and Coordination	Hourly (NTE)	\$4,000
2	Meetings and Project Coordination	Hourly (NTE)	\$4,500
3	Plan Review	Hourly (NTE)	\$5,000
4	On-Call Planning Consultation (At-Request)	Hourly (NTE)	\$5,000
Part 1 Total:			\$18,500
<b>Part 2: CRA Plan Update (Lump Sum)</b>			
5	Initiation	Lump Sum	\$3,000
6	Assessment and Evaluation	Lump Sum	\$10,000
7	Market Assessment	Lump Sum	\$10,000
8	CRA Plan	Lump Sum	\$20,000
9	Working Group and CRA Board Meetings	Lump Sum	\$12,000
Part 2 Total			\$55,000
Direct Expenses (Estimated):			\$1,000
Total Part 1 and 2 Estimate ( <i>including direct expenses</i> )			\$74,500

## **Reimbursable Expenses**

Reimbursable expenses may include in-house and out-of-house project costs required to perform and deliver design documents, expenses related to out-of-town travel for project meetings, permit phase services, and construction phase services such as postage, courier services, overnight deliveries, mileage, rental cars, and meals. General reproduction for progress prints and permit submittals is not anticipated. Reimbursable expenses will be invoiced separately on an actual cost basis.



### **Assumptions and Understandings**

GAI's Scope of Services, Schedule, and Compensation as set forth above have been prepared on the basis of the following assumptions and understandings:

1. Access to the project site(s) or other land upon which GAI is to conduct any field work will be available to GAI personnel in a timely manner.
2. Client has provided all its requirements for GAI's scope of services and all criteria and/or specifications that GAI should utilize at the time this Proposal is authorized. This includes any requirement for any statement of professional opinion or certification.
3. Client has provided all available information pertinent to GAI's scope of services, including previous reports/drawings; utility information; topo information, etc. at the time this Proposal is authorized. Unless otherwise noted, GAI may rely upon such information.
4. Client will give GAI prompt notice whenever it observes or otherwise becomes aware of any development that affects the scope or timing of GAI's performance.
5. Client will examine and provide comments and/or decisions with respect to any GAI interim or final deliverables within a period mutually agreed upon.
6. Any of Client's other consultant(s)/contractor(s) will cooperate and coordinate with GAI in a timely and efficient manner.
7. GAI's proposed compensation and schedule are based on receipt of authorization to proceed within ninety (90) calendar days of the date of this Proposal. GAI reserves the right to adjust its compensation if authorization to proceed is not received within ninety (90) calendar days.



# Memorandum

Planning | Urban Design  
Landscape Architecture  
Economics | Real Estate

To	Kesi Warren, Orange County	Pages 1
CC	Kaitlin Kolhoff, Orange County; Pete Sechler, GAI	
Subject	Y22-143B-AH GAI Subconsultants	
From	Blake Drury, GAI	
Date	August 12, 2022	

Ms. Warren,

You requested a written statement listing all majority subconsultants GAI will use on the above-referenced contract. Our subconsultants, listed below, are all part of Orange County's M/WBE or SDV program. No majority subconsultants are included on our team.

### Subconsultants:

1. ecoPreserve, LLC – 12% of contract value for Sustainability Planning (WBE)
2. Rhodes + Brito Architects, Inc. – 5% of contract value for Architectural (MBE)
3. The Balmoral Group, LLC – 8% of contract value for Economic Consulting and GIS (WBE)
4. Drummond Carpenter, PLLC - 8% of contract value for Community Planning Services, Civil Engineering, and Sustainability Services (SDV)

END NOTES

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