

## DEVELOPMENT CODE UPDATE SCOPE OF WORK

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*This Scope of Work refers to the Norman Zoning Code and Subdivision Code jointly as the “Development Codes.”*

### PARTICIPANTS AND PROJECT COMMITTEES

**Norman Project Team (NPT)** – City’s Project Manager and core project leadership staff (e.g., Planning and Community Development, Public Works, City Attorney’s Office).

- Role: Project management
- Meeting Frequency: At least twice a month

**Residents and Community Members** – Members of the public who will be asked for input and feedback about topics in the NDC that are important to the community (typically as identified in Norman’s adopted plans).

- Role: input and feedback about regulatory preferences, identification of community concerns
- Meeting frequency: one set of meetings (2-3 meetings) for each draft installment; multiple meeting options for public draft review, as determined by the Public Engagement Plan.

**Working Group (WG)** –Project support group of up to 20 members that includes representatives from: (1) all City departments who use the Development Codes, and (2) private-sector professionals who use the Development Code frequently as part of their work (e.g., developers and builders, design professionals, civil engineers, and land use attorneys) who will provide input and comment on the NDC Technical Draft and the Parking Study.

- Role: Technical and subject matter input about draft regulations, parking, and City review processes
- Meeting frequency: Monthly

**Planning Commission and City Council (PC and CC)** –The primary elected and appointed decision-making bodies who provide feedback and guidance about policy implementation and Development Code updates, we may also interact with the Board of Adjustment and other boards and commissions whose missions are impacted by the NDC.

- Role: Policy clarification and drafting guidance/instruction
- Meeting frequency: at least quarterly, more often as needed

The meetings addressed in this scope are exclusive of those addressed in the Parking Study scope. Every effort will be made to conduct meetings efficiently for the purposes of both drafts and Clarion shall ensure meeting attendance of only necessary team personnel and leads.

### TASK 1. PROJECT STARTUP

This task is designed to establish and set in motion the processes and conversations that will lay the foundation for the success of the project.

#### 1.1: PROJECT MANAGEMENT MEETING

An initial virtual kick-off meeting will be held with the Norman Project Team (NPT) to confirm project roles and responsibilities, gather background data and information, and establish an agenda and dates for the initial round of project orientation meetings. As part of this Task, the consultant team will prepare:

**PUBLIC ENGAGEMENT PLAN (ONGOING)**

Building on the conversations started with the AIM Norman process, the PEP will establish an engagement process that helps educate and inform community members who are eager to work on zoning about how they can participate in the Development Code update and Parking Study across the course of both processes. The Public Engagement Plan will describe our overall approach to public participation, incorporate methods to secure and maintain community participation, and identify key milestones to reflect on the success of the engagement process and switch modes as needed to respond to changing circumstances throughout the duration of the project. We will work with the City Communications team to incorporate key deadlines, refine outreach messages to ensure they resonate with the community, and follow through on consistent project messaging and information sharing throughout the project.

**PROJECT MANAGEMENT (ONGOING)**

We rely on effective project management as an essential component of getting to adoption. Our goal is to complete our projects on time and within budget and we find that our success at this is due in part to our communication with our clients throughout the project. As the project gets underway, we will schedule regular consultant/staff project coordination calls – typically every other week. We use these calls to talk through the full range of project scheduling, community outreach, and drafting issues.

**1.2: ORIENTATION MEETINGS**

The Clarion team will start the project with a series of live and virtual project orientation meetings with City staff from all departments that interact with the NDC as well as Norman’s elected and appointed officials. Topics will include overall project goals, scope and schedule, ongoing City activities that may impact the NDC update, initial strategies for public involvement, and key issues for the new NDC. The Clarion team will be on-site for two full days and will schedule as many orientation meetings as possible during that time, with the remaining orientation meetings scheduled virtually over a two-to three-week period to accommodate the schedules of the various participants.

TASK 1 SUMMARY			
	CLARION RESPONSIBILITIES	NPT ESPONSIBILITIES	OUTREACH PARTICIPANTS
TASK 1.1 Project Management	<ul style="list-style-type: none"><li>• Draft and maintain Public Engagement Plan and Project Management Plan</li><li>• Organize project management calls</li><li>• Start project branding and website creation</li></ul>	<ul style="list-style-type: none"><li>• Provide background materials</li><li>• Comment on Public Engagement Plan</li><li>• Provide public schedule updates</li><li>• Participate in project management calls</li></ul>	<ul style="list-style-type: none"><li>• NPT</li></ul>

TASK 1 SUMMARY			
	CLARION RESPONSIBILITIES	NPT RESPONSIBILITIES	OUTREACH PARTICIPANTS
TASK 1.2 Orientation Meetings (in person and virtual)	<ul style="list-style-type: none"> <li>• Draft invitations and agenda(s)</li> <li>• Facilitate meetings</li> <li>• Initial and wrap-up meetings with NPT</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule meetings with City staff and officials</li> <li>• Participate in meetings</li> </ul>	<ul style="list-style-type: none"> <li>• All Community Development divisions</li> <li>• PC/CC members</li> <li>• Downtown Development Authority</li> <li>• Historic District Commission</li> <li>• Public Works</li> <li>• Engineering</li> <li>• GIS</li> <li>• Other Departments as determined by NPT</li> </ul>

### Task 1 Deliverables

1. Project Kickoff Memo
2. Public Engagement Plan
3. Project Management Workbook
4. Project Coordination Meetings Rolling Agenda
5. Orientation Meetings Invitation and Agenda
6. In-Person Orientation Meetings
7. Project Website

## TASK 2. NDC EXISTING CODES ASSESSMENT [RFP TASK 1]

The Existing Codes Assessment helps us create a project roadmap for future drafting. We also use the Existing Codes Assessment to start educating the community about the importance of the Development Code update project and invite them to join in the project when they are ready.

### 2.1: NDC EXISTING CODES ASSESSMENT: STAFF REVIEW DRAFT

The Clarion team will conduct an analysis of the current Development Codes, AIM Norman Comprehensive Plans, and parking issues and combine our findings with information gathered during the project orientation meetings and issues identified by staff to prepare a detailed Assessment of topics that will be addressed as part of the NDC update. This Existing Codes Assessment will determine how well the current regulations support AIM Norman highlight areas where the Development Codes, including the City’s approach to parking, are out of alignment with best practices, and identify contradictions, outdated terminology, or over-complicated processes that hinder development and enforcement.

The Existing Codes Assessment will also include descriptions of conceptual regulatory approaches and high-level parking requirement changes that could be used to resolve existing issues. Where appropriate, we will present several possible solutions, and work with the NDC to

ascertain which approach would work best in Norman based on staff capabilities, elected official preferences, and development community practices.

We will also use the Existing Codes Assessment to explore some of the big picture issues the City has identified in the RFP, such as:

- By-right allowance for multiple housing types that are currently infeasible under the current code, with a focus on removing obstacles to affordable housing;
- Increasing overall flexibility of different uses in an effort to minimize the use of PUD/SPUD;
- Enhancing neighborhood walkability, limiting cut-through traffic, and improving connectivity;
- Exploring the possibility of minimum density requirements in key areas of the city;
- Promoting greater density along the proposed RTA corridor; and
- Coordination between the Development Code and the City of Norman Engineering Design Criteria and Standard Specifications and Construction Drawings for Streets, Storm Drainage, Water Lines, and Sanitary Sewers.

For each of these issues, we will provide a background explanation of why the topic is a key planning issue, some discussion of how peer communities have been addressing this issue, high level regulatory options, and recommendations for further community discussion to help identify concerns and possibilities.

Finally, the Clarion Team will provide a short summary of the pros and cons of creating a Unified Development Code in Norman. While our team usually recommends regulatory consolidation to make the Code as comprehensive as possible and help code users find needed information, we understand there are legitimate reasons for assigning some regulatory topics to other locations.

We will share the Existing Codes Assessment first draft internally with staff and WG to review and provide substantive feedback. Following staff preparation of one round of written comments, the Clarion team will revise the NDC Existing Codes Assessment and prepare the Public Review Draft.

## **2.2: NDC EXISTING CODES ASSESSMENT: PUBLIC REVIEW DRAFT**

In this task, the Clarion team will work with the NDC Project Team to schedule in-person update presentations for the Planning Commission and City Council followed by up to four in-person community meetings, as detailed in the Public Engagement Plan, to share the NDC Existing Codes Assessment and collect community comments. The objectives of these meetings will be to invite the public into the NDC update conversation, preview the general scope and parameters of the issues that the project will address, and identify critical topics where more extensive community-based conversation will be needed to move toward shared resolution. We will summarize the feedback from the public outreach meetings and share it as an addendum to the NDC Existing Codes Assessment.

## **2.3: STOP-GAP MEASURES**

As requested in the RFP, we will review the existing regulations to identify standards and provisions for infill and redevelopment to identify standards that can address project design to

help avoid undesirable or inappropriate development in the community. We will frame this task as a preliminary discussion between the consultant team and the NPT. Based on the outcomes of that discussion, the Clarion team will work with the City Attorney’s Office and WG to either draft targeted revisions to the current Development Codes to address these issues or identify how these changes will be folded into the overall Development Codes update.

<b>TASK 2 SUMMARY</b>			
	<b>CLARION RESPONSIBILITIES</b>	<b>NPT RESPONSIBILITIES</b>	<b>OUTREACH PARTICIPANTS</b>
TASK 2.1 Staff Draft Existing Codes Assessment	<ul style="list-style-type: none"> <li>Staff draft NDC Code Assessment</li> <li>Public Review draft NDC Code Assessment</li> </ul>	<ul style="list-style-type: none"> <li>Provide consolidated written staff comments</li> </ul>	<ul style="list-style-type: none"> <li>NPT</li> </ul>
TASK 2.2 NDC Existing Codes Assessment Rollout	<ul style="list-style-type: none"> <li>Presentation materials as necessary (PowerPoints, handouts, boards)</li> <li>Post NDC Issues Assessment to website for additional comment</li> <li>Present assessment to PC, CC, and public</li> </ul>	<ul style="list-style-type: none"> <li>Coordinate meeting logistics (scheduling, meeting space, food)</li> <li>Comment on presentation materials</li> <li>Post-outreach comments (any edits will be reflected during drafting)</li> </ul>	<ul style="list-style-type: none"> <li>CAC, PC and CC</li> <li>NDC Partners</li> <li>Public</li> </ul>
TASK 2.3 Stop-Gap Measures	<ul style="list-style-type: none"> <li>Stop-Gap Measures Memo identifying potential interim or short-term Development Code updates</li> </ul>	<ul style="list-style-type: none"> <li>Provide consolidated written staff comments</li> <li>Identify next steps for any necessary Development Code amendments and updates to PC and CC</li> </ul>	<ul style="list-style-type: none"> <li>NPT</li> <li>PC and CC</li> </ul>

**Task 2 Deliverables**

- Existing Codes Assessment: Issues List
- Existing Codes Assessment: Staff Review Draft
- Existing Codes Assessment: Public Review Draft
- Public Presentation Materials
- In-Person Presentations and Outreach Meetings
- Public Comment Matrix
- Stop Gap Measures Memo

**TASK 3. PREPARE TECHNICAL DRAFT DEVELOPMENT CODE AND REMAPPING PROCESS [RFP TASKS 2,3]**

With the Existing Codes Assessment and community feedback gathered, the Clarion team will begin drafting the new NDC. Historically, we have drafted a new Development Code in three installments (Zoning Districts and Land Uses, Development and Subdivision Standards, and Code Administration and Development Review Procedures) and collected both City and public feedback with each installment. This approach works well when the process primarily involves people who

are familiar with both the existing Development Code and the development process. However, over the past five to 10 years, we've noticed an increase in general public and interest groups (e.g., bicyclists, neighborhood organizations, and sustainability advocates) and know this is also the case in Norman.

To keep participants engaged and maintain a transparent and accessible process, we are evolving our engagement approach. For the new NDC, we propose creating a full Technical Draft during the first half of the project and doing outreach for a full Public Review Draft during the second half of the project. This brings the public into the project at a juncture where there is content and information that addresses their topic of interest and allows them to respond to concrete content and regulations as proposed in the draft. It also allows the public to see progress more quickly, by showing the connection between AIM Norman and the updates to the Development Code.

### **3.1: TECHNICAL DRAFT DEVELOPMENT CODE: STAFF REVIEW DRAFT**

The Technical Draft of the NDC will incorporate the substantive changes agreed upon through the Existing Codes Assessment process. The draft will include graphics, tables, and charts to explain zoning and land use concepts, instead of voluminous text. Areas that will benefit from illustrations will be noted, though actual illustrations may not be finalized until final language is agreed in later drafts. The updated NDC will likely include a substantial amount of new information, presented in a new format. To make the review process more manageable for staff, each installment will include commentary and footnotes to explain changes in regulations and practice and the rationale behind each new provision. The commentary and footnotes will also demonstrate how the revised code addresses the issues noted in the Existing Codes Assessment.

#### **DRAFTING ORGANIZATION**

##### **Installation 1 – Districts and Uses**

This installment focuses on updating the current lineup of zoning districts to align with relevant City plans and policies. Revisions to dimensional standards accompany zoning district adjustments, and this installment also looks at needed improvements for any special districts or overlays the City has. Updates to the use regulations will also be included in this installment. This work includes revisiting the categories, specific use types, review type (e.g., permitted use, special use) and use-specific standards for clarity, relevance (do the standards reflect how this use is developed now?), and potential for approval streamlining. A proposed updated zoning map will be prepared in this installment and will be revised based on conversations throughout the drafting process.

##### **Installation 2 – Development Standards**

This installment focuses on the development quality standards, such as parking, landscaping, sustainability/resilience, access and circulation, sensitive area protection, building and site design, and exterior lighting. Context-sensitive design standards will be considered with the development standards and will be integrated and reconciled with any standards drafted during the zoning districts installment. The development standards are often the most complex part of a Development Code because of the breadth of standards and their relationship to standards that often live outside the Development Code (such as street standards and other engineering standards). We will work with staff to identify the appropriate location for and potential integration of standards within and outside the Development Code.

##### **Installation 3 – Administration and Procedures**

This installment focuses on streamlining the current procedures for development review applications. Clarion’s expert drafters are experienced in establishing procedures that are easy to understand, are based on a consistent and predictable foundation, and apply objective approval criteria, while offering flexibility where appropriate. This installment will also include the general provisions of the Development Code, which contain important elements to ensure the new Development Code functions effectively (e.g., legal authority to regulate land development, relationship to other codes, nonconformities, and enforcement of the Development Code).

### **DRAFTING SEQUENCE**

1. We will prepare the Technical Draft iteratively, first sharing all of the content for the current installment with the WG and NPT. We will schedule 90-minute to two-hour monthly WG meetings to discuss the proposed content
2. When a full installment has been reviewed by the WG, we will work with the NPT to identify appropriate updates and keep a list of issues for community or policy-maker discussion.
3. As we move into the second and third installments, we will maintain this review schedule and add the new installments to a consolidated draft that includes the content from the earlier installments. We will also incorporate notes or comments from Task 3.2, Community Engagement.

At the completion of the consolidated Technical Draft, we will work with the NPT to determine whether any additional review is needed before sharing the draft with the community.

### **3.2: TECHNICAL DRAFT DEVELOPMENT CODE: COMMUNITY ENGAGEMENT**

While the Clarion team is working with the WG and NPT to prepare the full Public Review Draft of the new NDC, we will also be reaching out to the community to gather information to help us draft a new NDC that is unique to Norman, not an adjusted version of a code from a different community. We have had recent success with community-based outreach using some of the following exercises:

- Meeting-in-a-Box activity (live and online) to explore how neighborhoods and individuals see what is important to keep or change;
- Posting an interactive ESRI StoryMap to explain existing zoning and to gather feedback about potential zoning changes; and
- Project fact sheets and surveys to continue education from AIM Norman about density and housing choices and start a community-wide discussion about anticipating change.

Members of the Clarion team will schedule in-person meetings over a two-day session for each installment to initiate each of the community outreach activities and to help facilitate focus group discussions about both the outreach exercise and the draft NDC status. As allowed by the schedule, we will also provide project updates to the Planning Commission and City Council in-person during the community outreach sessions.

We will organize the comments received from the Planning Commission, City Council, and the public to review with the NPT. Our goal will be to identify any additional edits that need to be made to the Technical Draft.

### 3.3: PUBLIC REVIEW DRAFT DEVELOPMENT CODE: STAFF REVIEW DRAFT

Based on the comments received, the Clarion Team will revise the Technical Draft and create a staff review draft of the Public Review Development Code and a revised Zoning Map. Staff will have the opportunity to provide guidance on unclear or conflicting comments received during the community engagement process, identify outstanding issues, and refine mapping decisions.

The Clarion Team will incorporate all staff edits, hold two in-person review session with the WG (and a follow-up virtual review sessions if needed), and finalize the Public Review Draft of the Development Code.

TASK 3 SUMMARY			
	CLARION RESPONSIBILITIES	NPT RESPONSIBILITIES	OUTREACH PARTICIPANTS
TASK 3.1 Technical Draft NDC	<ul style="list-style-type: none"> <li>• Staff draft Installments 1, 2, 3, and full code</li> <li>• Facilitate WG meetings</li> <li>• Present project overview to PC and CC</li> <li>• Revisions per NDC Project Team instructions</li> <li>• Post Technical Draft to website</li> </ul>	<ul style="list-style-type: none"> <li>• Distribute drafts and coordinate internal review</li> <li>• Schedule outreach meetings</li> <li>• Provide one round of consolidated written staff comments per installment</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> <li>• WG</li> <li>• CAC, PC, and CC</li> </ul>
TASK 3.2 Technical Draft NDC - Community Engagement	<ul style="list-style-type: none"> <li>• Prepare materials for outreach activities</li> <li>• Facilitate public meetings</li> <li>• Collect and catalogue comments</li> <li>• Share public comments</li> </ul>	<ul style="list-style-type: none"> <li>• Review and comment on activities</li> <li>• Review public comments to identify appropriate edits</li> <li>• Answer questions as needed</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> <li>• CAC, PC, and CC</li> <li>• Public</li> </ul>
TASK 3.3 Public Draft Development Code - Staff Review	<ul style="list-style-type: none"> <li>• Revisions per public comments and NPT instructions</li> </ul>	<ul style="list-style-type: none"> <li>• Distribute drafts and coordinate internal review</li> <li>• Schedule outreach meetings</li> <li>• Provide one round of consolidated written staff comments</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> </ul>

#### Task 3 Deliverables

1. Technical Draft: Installment 1
  - a. Staff Review Draft
  - b. WG Materials
  - c. Key Issues Engagement Materials and Comment Summary List
  - d. PC/CC Project Update Materials
  - e. In-Person Presentations (WG/PC/CC) and Community Outreach Meetings
2. Technical Draft: Installment 2
  - a. Staff Review Draft
  - b. WG Materials

- c. Key Issues Engagement Materials and Comment Summary List
  - d. PC/CC Project Update Materials
  - e. In-Person Presentations (WG/PC/CC) and Community Outreach Meetings
- 3. Technical Draft: Installment 3: Staff Review Draft
  - a. Staff Review Draft
  - b. WG Materials
  - c. Key Issues Engagement Materials and Comment Summary List
  - d. PC/CC Project Update Materials
  - e. In-Person Presentations (WG/PC/CC) and Community Outreach Meetings
- 4. Norman Development Code Public Review Draft
  - a. Staff Review Draft
  - b. WG Meeting Materials and In-Person Meetings
  - c. Revised NDC Public Review Draft

## **TASK 4. PUBLIC REVIEW DRAFT NDC**

When the Technical Draft review process and editing is complete, the Clarion team will move into the Public Review Draft phase of the project.

### **4.1: PUBLIC REVIEW DRAFT DEVELOPMENT CODE: COMMUNITY ENGAGEMENT**

The Clarion team will post the Public Review Draft on the project website for comment. While the Public Review Draft is open for review, the Clarion team will facilitate three in-person and concurrent online learning and Q&A sessions about the various components of the NDC. Each of the learning sessions will be recorded and posted on the project website for later viewing. We also anticipate providing two project updates to the Planning Commission and City Council in this timeframe.

### **4.2: ADOPTION DRAFT DEVELOPMENT CODE**

We will organize the comments received from the Working Group, Planning Commission, City Council, and the general public for a discussion with the NPT about which revisions to incorporate in the Adoption Draft Development Code. As with the Technical Draft and Public Review Draft, we will first prepare a staff review draft of the Adoption Draft Development Code. After one round of consolidated feedback on the staff review draft, we will prepare the Adoption Draft to be carried forward into the adoption process. While we are working on final edits, we will ask the Planning Commission to host a series of three workshops, open to the public, to review and discuss the updated Norman Development Code. Any additional Planning Commission recommended changes will be reviewed for inclusion in the Adoption Draft. This draft will include final versions of illustrations, charts, tables, and revised text and will address any outstanding issues noted in earlier tasks.

## TASK 4 SUMMARY

	CLARION RESPONSIBILITIES	NPT DRESPONSIBILITIES	OUTREACH PARTICIPANTS
TASK 4.1 Public Draft Development Code - Community Engagement	<ul style="list-style-type: none"> <li>• Post Public Review Draft to website</li> <li>• Prepare materials for outreach activities</li> <li>• Facilitate learning sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Review and comment on activities</li> <li>• Review public comments to identify appropriate edits</li> <li>• Answer questions as needed</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> <li>• CAC, PC, and CC</li> <li>• Public</li> </ul>
TASK 4.2 Adoption Version Development Code	<ul style="list-style-type: none"> <li>• Revisions per public, PC, and CC and NPT instructions</li> </ul>	<ul style="list-style-type: none"> <li>• Distribute drafts and coordinate internal review</li> <li>• Schedule adoption hearings and additional meetings as needed</li> <li>• Provide one round of consolidated written staff comments</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> </ul>

### Task 4 Deliverables

1. Community Engagement Materials (for in-person and virtual meetings)
2. Materials for and In-Person Planning Commission Workshops
3. Updated Comment Summary List
4. Adoption Draft NDC

## TASK 5. ADOPTION PROCESS AND NEW NDC IMPLEMENTATION

### 5.1: ADOPTION MEETING SUPPORT AND PRESENTATIONS

Following posting and distribution of the Adoption Draft, the Clarion team will present the Adoption Draft in person at one Planning Commission meeting and one City Council meeting. As needed, we will also support the NPT with supplementary materials or revised ordinance language.

### 5.2: POST-ADOPTION CODE CLEAN-UP AND IMPLEMENTATION SUPPORT

Clarion will prepare a final adopted version of the new Norman Development Code that reflects comments and amendments that result from the public hearings on the Adoption Draft. NDC implementation support will start in Task 4 and continue through the first full year of NDC use. The Clarion team will provide resources to assist staff with implementation of the updated NDC, working with the NPT to determine what types of resources would be most beneficial. Examples of the resources we have provided previous clients include: the preparation of administrative manuals, procedural checklists for development review, training in Microsoft Word styles (to assist in maintaining the numbered outline format of the document as it is amended over time), crosswalks between old and new regulations, and training sessions to familiarize staff and developers with the updated NDC. We will schedule one, two-day in-person meeting session and provide additional support virtually.

## TASK 5 SUMMARY

	CLARION RESPONSIBILITIES	NPT DRESPONSIBILITIES	OUTREACH PARTICIPANTS
TASK 5.1 Adoption Meeting Support and Presentations	<ul style="list-style-type: none"> <li>• Prepare for and attend adoption hearings</li> <li>• Draft anticipated support materials</li> </ul>	<ul style="list-style-type: none"> <li>• Review support materials</li> <li>• Coordinate presentation and question responses</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> <li>• PC and CC</li> <li>• Public</li> </ul>
TASK 5.2 Post-Adoption Code Clean-Up and Implementation	<ul style="list-style-type: none"> <li>• Revise NDC with any final edits</li> <li>• Draft implementation support materials and facilitate trainings/ workshops as needed</li> </ul>	<ul style="list-style-type: none"> <li>• Review final NDC edits and coordinate codification</li> <li>• Select and review desired implementation materials</li> </ul>	<ul style="list-style-type: none"> <li>• NPT</li> </ul>

### Task 5 Deliverables

1. Adoption Support Materials
2. In-Person Presentations at Planning Commission and City Council Adoption Hearings
3. Post-Adoption Revised NDC
4. Zoning Map will be delivered as an ESRI layer package
5. Implementation Materials (content as identified through discussion with NPT)

## PARKING STUDY

### Task 1 Study Initiation & Project Management

The Parking Study Project Manager, which will be identified by Clarion prior to beginning work, and will not be changed without Clarion consulting with the City of Norman, will provide oversight throughout the duration of the project to guarantee the City receives the highest quality study outcomes. Our process throughout the study will ensure that:

- The scope of services is produced, adhered to, and revised if mutually agreed to with the project manager
- The team is regularly informed of project status and is an active partner in the execution of the project
- Meeting materials and all deliverables are of the highest quality

#### 1.1 Kickoff Meeting

The Parking Study Project Manager will facilitate a kickoff meeting, bringing together the City's project leads, key members of our team, and the WG to develop/confirm a common understanding of the objectives, requirements, timeline, and performance expectations for this component of the overall study. This meeting will review proposed scope and timeline proposed here, **and make necessary adjustments to guarantee the project will meet all City needs for the overall study, and realize the optimal potential for the parking study.** Key elements of the study to be confirmed, and documented within a Project Work Plan to include:

- Study Area/s

- Land Uses of Focus – A key focus for this parking study will be to analyze the dynamic, complex relationship between existing land uses and: related City parking code standards and requirements, on-site parking supplies developed to meet their parking needs, and levels of parking demand generated by each land use.
  - As such, the parking study must include the collection of data that can inform this analysis
  - As such, our data collection plan will need to prioritize data that can inform analysis of the land use of greatest concern for the City
  - This includes those land uses that seem to be consistently oversupplied by developers, especially when oversupplied independent of code requirements
  - This also includes uses suspected of creating risk of “spillover” parking if undersupplied or supplied/managed in a way that incentivizes off-site street parking
  - It will also likely include land uses that are of key concern to the City for reasons that will be revealed at the Kickoff Meeting.
- Data Collection Zones: Those proposed later in this Scope of Work will be presented for discussion, review, and revision into a final set of clearly defined zones that respond to the goals, objectives, and specific requirements outlined for the in the RFP.
- Data Collection Plan: A reliable and accurate dataset is essential to ensure the study is informed by data that is both comprehensive and directly responsive to the study’s intent, goals, and objectives. Beyond getting the data right, success will require that all details and deliverables be discussed in depth and all expectations are clear.
  - Our team will work with the City to develop a clear **data collection plan** that specifies deployed technologies, collection zones and sites, schedules, quality control and assurance, and deliverables to ensure full transparency.
  - We will also develop a data-collection **schedule** that meets schedule requirements and ensures appropriate collection dates and times to capture representative conditions, as relates to seasonal variations, events, and other temporary conditions like street closures and repairs.
  - We will work closely with the team to make sure that our schedule, and any changes that occur, are transparent and well communicated throughout the project.
- Community Engagement Plan: Detailed plan for engaging key community groups to be prioritized for interviews and focus groups, including the approach, timing, and follow-up for incorporating received input into study analysis and outcomes.

## 1.2 Project Work Plan

Following the Project Kickoff Meeting, the Parking Study Project Manager will provide a final Project Work Plan (PWP), which supersedes and elaborates upon this Scope of Work, incorporating changes, expansions, and clarifications that reflect input received and consensus achieved on key elements of the parking study approach. This PWP will also incorporate final Data Collection and Community Engagement plans, as outlined below.

## 1.3 Data Collection Plan

Following the Project Kickoff Meeting, the Parking Study Project Manager will provide a draft Data Collection Plan, revising/finalizing the approach outlined in Task 1 below, based on feedback received during the meeting and any necessary follow-up communications with the Parking Study

Project Manager. Of crucial importance for timely completion of the data collection tasks will be achieving a clear consensus on:

- Data that will be provided by the City,
- Data that is available via other sources, and
- Data to be collected by the Consultant Parking Study Team (PST).

#### 1.4 Community Engagement

The Parking Study Project Manager will coordinate with the City parking study team to:

- Leverage past and concurrent community engagement efforts, as feasible, to inform the parking study
- Engage with key members of the **WG** to inform the parking study, with a particular focus on complementing data findings from Task 1, providing essential insights into the conditions that underly that data, and the implications of the data findings for the parking study, and the City’s overall goals related to the PRO Housing grant.
- Facilitate a combination of **Subject Area Expert (SAE) Interviews** – with key City staff, parking operators, developers, etc. – as well as **focus groups with key members of the WG and Residents and Community Members group organized for the Code Update** – developers, property/business owners, residents, advocates, etc.

Our proposed budget assumes no more than six SAE interviews, and no more than four focus groups, all to be completed via a combination of video-conferencing calls and/or on-site, in-person interviews that can be coordinated to coincide with other in-person elements of proposed project tasks. These and other details will be confirmed in a final Community Engagement Plan, included with the final Project Work Plan outlined above.

The meetings addressed in this scope are exclusive of those addressed in the Development Code scope. Every effort will be made to conduct meetings efficiently for the purposes of both drafts and Clarion shall ensure meeting attendance of only necessary team personnel and leads.

#### 1.5 Project Coordination Calls

The Parking Study Project Manager will facilitate regular meetings at intervals to be determined at the project kick-off between City project leads, our project manager, and subconsultant leads, as needed and appropriate, to review interim products, provide timely feedback, and plan upcoming activities ensuring seamless coordination and execution. These 30-minute to one-hour meetings will be conducted via teleconference.

##### Task 1 Deliverables:

- [Parking Study Work Plan: Final, approved Scope of Work, Budget, and Timeline, including detailed Data Collection Plan and Community Engagement Plan](#)

##### Task 2 Document Existing Conditions

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The success of this study begins with developing an effective data collection plan. The compiled data set must be comprehensive enough to capture key variables in the relationship between land uses, context, and parking generation. The data set must also be deep enough to identify consistencies within common sets of variables. This is essential for data collected to reliably

capture current rates of parking generation from individual land uses and destinations. The success of the data collection plan will require collaboration with the City team to ensure the collected data is broad enough and deep enough to capture these consistencies and distinctions for the land uses and contexts prioritized by the City. Our team, led by our partners at Parkalytics, bring specialized expertise in both data collection plan designs, and effective plan execution.

The first three sub-tasks below outline our proposed approach for the data collection plan, to be refined and finalized with the City project team. These are followed by sub-tasks proposed for the analysis of the collected data and a review of the current parking and related elements of the City's zoning/development codes.

## **2.1 Assessment Zones**

For this task, the PST will confirm, via GIS-based maps and data, the zones within which parking inventories will be compiled and utilization conditions will be documented for this study. The following zones are assumed to be the focus for the study, to be confirmed during the Project Kickoff meeting, with details of on-street blocks and off-street parking locations to be included in the Data Collection Plan, provided prior to commencing Task 2.

- Downtown CBD
- Campus Corner
- University North Park
- Special Use Area
- Suburban Area

## **2.2 Parking Inventories**

Within each Assessment Zone, the PST will compile an inventory of parking resources. The resources will be defined for each zone in the Data Collection Plan and will be likely to include some or all of the following information:

- **Off-Street Parking**
  - City Owned/Managed lots, with sub-inventories defined based on:
    - Hourly parking spaces
    - Daily/Monthly (permit) parking spaces
    - Time Limited parking spaces
    - Other key space types
  - Privately Owned/Managed lots, including facility-level inventories for
    - Commercial lots
    - Shared lots
    - Restricted lots determined to have shared parking potential
- **On-Street Parking**

Block-face level capacity measures, including sub-inventory counts for:

  - Metered parking
  - Time-limited parking

- ADA parking
- Loading zones
- Bus Stops
- Other Key Uses

Additionally, the PST will work with the City project team to identify any on-street parking spaces included in these inventories that may be out of conformance with applicable regulations, such as Manual on Uniform Traffic Control Devices (MUTCD). Spaces identified by the City project team will be assessed via aerial imagery and/or direct physical inspection, as necessary, to determine their compliance status, non-compliant elements, and options for achieving compliance. Finally, the PST will work with the City project team to assess compliance of public parking inventories with current Americans with Disabilities Act (ADA)/Public Right-of-Way Accessibility Guidelines (PROWAG) requirements and design standards.

At the discretion of the City’s project manager, Assessment Zone inventories will be adjusted to account for non-compliant spaces, and spaces that may need to be redesignated as ADA-reserved spaces.

### **2.3 Utilization Surveys**

The Parking Study team will complete a series of utilization surveys, within each Assessment Zone, to capture parking occupancy levels and utilization patterns, as defined for each zone in the final Data Collection Plan, but likely to include some combination of the following:

- **Peak-Hour Counts**

Collected to capture parking demand in a given location, at key times, to:

- Quantity peak parking generation rates for a specific land use
  - Key to informing zoning/development code updates
- Quantify peak parking demand for a given location, facility, or area
  - Key to defining supply deficits/surpluses, thus highlighting supply/capacity expansion and/or demand-reduction needs.
  - Key to identifying opportunities for management strategies to shift demand, from constrained locations to those with excess capacity

- **Hourly Counts**

Collected to capture parking demand in a given location, at a key time period, over a period of time, including changes in demand over that period

- Completed to capture times and locations marked by constrained, balanced, and/or underutilized supply conditions
- Can be useful for identifying the timing and duration of constrained conditions – to better assess the costs/benefits of potential supply vs. management improvement opportunities

- **Turnover/Duration Surveys**
  - Collected to assess the level of parking activity that a given space, or set of spaces, accommodates over a key period of time.
  - Often collected to assess compliance with limits on parking duration, or to identify opportunities to shift longer-stay parking away from high-demand spaces where turnover is a key management objective.

- **Additional Conditions**

Additional areas of observation/analysis were also identified in the RFQ for Task 1.A that will need to be identified via staffed field observations, rather than quantified via data collection and analysis:

- Locations for Ped/Bike Improvements
- Accessibility & Ease of Use Opportunities

## **2.4 Utilization Data Analysis**

The PST will review and organize the data collected during Task 1.1 and Task 1.2 for a comprehensive analysis of occupancy/utilization conditions within each Assessment Zone. This analysis will be sufficient to:

- Identify areas where parking is consistently underutilized/oversupplied  
Identify which of these areas could accommodate more parking via management/regulatory changes  
This includes private parking that could absorb demand from adjacent areas if made more accessible through shared parking
- Identify areas where parking supplies are constrained  
Identify the days, times of day, and duration of these constrained conditions

## **2.5 Code Evaluation**

The PST will assess the applicable current parking ordinances, working with the City project team to identify critical areas for analysis, including aspects of the current code that may be over- or under-anticipating parking needs, as well as missed opportunities to better guide or incentivize desired approaches to parking supply and demand management among new developments. Key code-supportive practices will also be identified, including curbside management practices in key growth areas as well as any policies and programs that facilitate/encourage reduced parking demand.

Code evaluation findings will be compared to a set of established and emerging best practices, selected to respond to the key issues and opportunities that are emerging at this concluding stage of existing conditions analysis. Codes and practices for off-street parking as well as related parking management and TDM practices will be highlighted, as may be appropriate to Task 1 findings to date.

### **Task 2 Deliverables: Existing Conditions Report**

- Existing Conditions Report - Summary of all Task 1 Findings
  - One (1) digital copy of the Existing Conditions Report in Adobe Acrobat format.

- Assumed to include at least two rounds of revisions, based on a consolidated set of non-conflicting comments provided by the City’s project manager for each round.
- Parking Inventory and Utilization Data, Maps, and GIS files
  - Excel, PDF, and ArcGIS files
- Evaluation/Diagnostic/Audit of Existing Regulations and Related Materials
  - One (1) digital copy of the Evaluation/Diagnostic/Audit in Adobe Acrobat format.

### Task 3 Assess Future Demand

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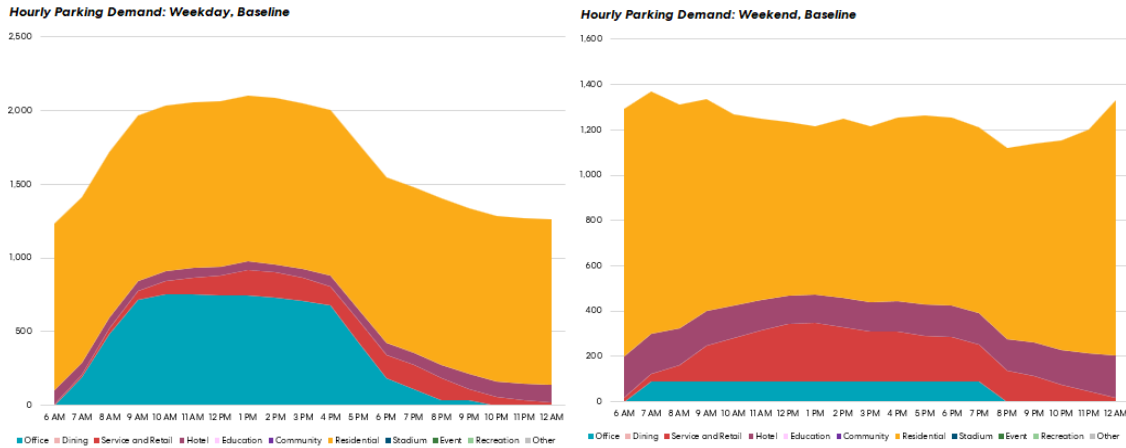
The PST will project potential future demand for parking within the study area, based on the existing demand levels and patterns documented in Task 2, as well as new demand based on current land use ordinances and projected business and residential growth, until at least 2045. To determine rates of growth for this assessment, we will work with the NPT to review recent growth trends, current and anticipated development projects, and any available growth forecasts determined to be reliable. This will include the types of land uses expected, including the number and types of housing units, as well as the levels of parking expected to be provided for each, based on historic norms, recent trends, and potential updates to code requirements, restrictions, and incentives.

Nelson\Nygaard's proprietary parking demand model will incorporate these anticipated measures to project future changes to:

- Study Area land use measures
- Study Area parking demand
- Study Area parking supplies

Nelson\Nygaard will use these inputs to develop up to three future-demand scenarios, and identify any significant demand/supply gaps projected for each – for key land use types, for each Assessment Zone, and for areas/districts that are expected to yield supply efficiencies through combinations of shared parking, land use mix, and non-driving mobility options. This “baseline” scenario will be assessed in comparison to two alternate scenarios, based on expected or potential changes, including anticipated implementation of recommendations from this study.

- **Scenario 1: Baseline Conditions**, minimal change that assumes no significant implementation of study recommendations expected to reduce parking demand rates/patterns within the study area
- **Scenario 2: Modest Change**, consistent implementation of recommendations that are likely to meaningfully reduce parking demand rates/patterns within the study area
- **Scenario 3: Transformative Change**, significant and sustained implementation of recommendations expected to transform the parking demand rates/patterns within the study area



The scenarios and their assumptions will be developed in coordination with the NPT and will reflect likely impacts of parking/mobility trends as well as implementation of study recommendations. For each scenario, the Parking Study team will assess model outputs, and articulate clear implications for:

- The adequacy of current parking supplies and development trends to meet short- and longer-term needs
- Areas and conditions in which parking is consistently undersupplied relative to demand, and potential zoning changes that could mitigate these conditions in the future, not limited to adjusting parking requirements
- Areas and conditions in which parking is consistently oversupplied relative to demand, any identifiable role that the current zoning likely plays in this, and potential zoning changes that could mitigate these conditions in the future
- The potential role of mobility improvements and parking/demand management in reducing parking demand in key growth areas, reducing needed parking supplies, and thus potentially increasing affordability for new homeowners, renters, and businesses

These findings and the overall approach and outcomes of this task will be summarized in text, tables, maps, and graphs and organized into a Future Demand Assessment summary memorandum.

### Task 3 Deliverable: Future Demand Assessment Memo summarizing all task steps, analysis, and findings

## Task 4 Parking Study Recommendations

### 4.1 City Team Workshop

The PST will facilitate a NPT workshop to develop a collaborative understanding of key Task 2 and Task 3 findings, introduce key considerations and available research on relevant strategies, and discuss implications for change options. Taking the time to build a shared understanding within the overall project team will be a critical step in creating a broader understanding of, and support for, eventual policy proposals. The workshop will culminate in documenting outcomes in the form of preliminary recommendations, based on a comprehensive review of potential recommendations. Potential recommendations will be organized for presentation and discussion, as suggested below, based on connections to key study objectives identified in the RFQ:

## **Supply, Demand, and Management Strategies** for Meeting Current and Projected Public Parking Demand

- **Public-Private Partnerships:** Including creation of license agreements/memorandums of understanding for public use of private off-street parking lots and other innovative and creative parking solutions.
- **Pedestrian/Bicycle Connectivity Improvements:** Including signage, wayfinding, and lighting recommendations.
- **Area Specific Solutions:** For Transit-Oriented Development, Mobility Hubs, Public Transit, ridesharing, biking, micromobility, and pedestrian-friendly initiatives that affect parking demand.
- **Public Parking Supply/Location Changes:** Changes to public parking supply and locations, including establishing peripheral parking and repurposing existing parking spots where appropriate.
- **Parking Structures, Mobility Hubs, Loading Zones:** Including potential locations
- **Curb Management Solutions:** Seek to optimize space through strategies that balance competing demands, enhance mobility, and support economic activity while prioritizing accessibility and safety.
- **Comprehensive Information Programs and Initiatives:** Programs and initiatives such as educational, informational and/or marketing materials for local businesses and residents, rideshare and bike share programs, park and walk initiatives, employee and user incentives, parking demand management, and enforcement.
- **Paid Parking Strategies:** Changes to existing rates and locations for paid public parking that is managed by the City of Norman.

## **Code Strategies** for Promoting Affordable & Workforce Housing

- **Minimum Parking Requirements/Recommendations:** Reducing, increasing, or eliminating, based on land use, location, and context  
Including specific requirements that will address the addition of ADUs as necessary.
- **Maximum Parking Ratios:** Based on fixed ratios or ratios that can be adjusted based on parking management, mobility improvements, and/or TDM commitments included with a proposal
- **On-Street Parking Credits:** Crediting available on-street parking toward a project's parking requirement
- **Off-Site Parking Allowances:** Crediting leased, existing but underutilized, off-site parking toward a project's parking requirement
- **Access Requirements:** Reframing off-street parking requirements as requirements for a blend of parking and mobility enhancements and demand-management initiatives that ensure optimal access to the proposed property
- **In Lieu Fees:** Providing the option to meet requirements via payment into fund for investments in public parking and/or mobility improvements
- **Bike parking standards:** Minimum requirements and design standards

- **ADA parking standards:** Minimum requirements as well as placement/distribution and design standards

### Of the policy options presented which 3 are you most excited about?

 <p><b>Eliminating Minimums</b></p> <p>This means no longer requiring a minimum amount of parking for new development</p>	 <p><b>Reducing Minimums</b></p> <p>This means reducing the amount of off-street parking required for new development</p>	 <p><b>Establishing Maximums</b></p> <p>This means putting a cap on the number of parking spaces that can be provided in a new development</p>	 <p><b>Unbundling Parking</b></p> <p>This means separating the cost of parking from other costs (e.g., rent or purchase cost)</p>	 <p><b>Updating Bike Parking Requirements</b></p> <p>This means establishing bike parking requirements that are tied to specific land uses rather than vehicle parking requirements.</p>
 <p><b>Updating the Parking Ordinance Purpose Statement</b></p> <p>This means revising the Parking Ordinance to reflect current policy goals.</p>	 <p><b>Establishing a Change of Use = No Parking Required</b></p> <p>This means allowing all existing commercial buildings to be occupied by a permitted use without the need to provide additional off-street parking.</p>	 <p><b>Establishing a Consistent Metric for Parking Calculations</b></p> <p>This means providing a static, measurable standard for all land use classifications as they relate to parking standards</p>	 <p><b>Establishing Consistent Access and Stall Standards</b></p> <p>This means putting a cap on the number of parking spaces that can be provided in a new development</p>	 <p><b>Exempting Small Businesses from Parking Requirements</b></p> <p>This means adopting a standard that exempts small businesses or a threshold of square feet (e.g., first 1,500 sq ft) from parking requirements.</p>

*From Petaluma City Council Workshop*

## 4.2 Community Engagement with Residents and Community Members

Our community engagement approach will need to reflect the distinct topics of interest related to downtown parking management conditions – demand/supply constraints, management opportunities, stakeholder needs/expectations, etc. – as distinct from topics related to zoning-code update opportunities in the proposed assessment zones – parking demand generation patterns, available supplies, code update opportunities, and developer practices, interests, and decision-making parameters. As such, this task is organized into two distinct approaches as described below.

### Downtown

Studies like this create unique opportunities to expand the ongoing conversation about parking and curb access within downtown districts. Critically, the conversation is expanded through the collection and analysis of supply and utilization data that provide a quantitative perspective on conditions that is both expansive – allowing assessment at the systemwide level – and detailed, enabling precise measures at key locations and times. However, parking is a very personal experience, and one that varies among those who rely on curb parking and access as residents, business owners/employees, and visitors. As such, engaging those most directly connected to downtown parking supply, demand, and management conditions will be critical to gaining a full understanding of current conditions, identifying critical needs, and developing solutions that deliver better experiences. Typically, we propose to meet with a small set of focus groups including downtown business/property owners, downtown employees, and downtown and adjacent-neighborhood residents.

### Assessment Zones

The PST will meet with key members of the WG and the Residents and Community Members group, including those involved in the housing/land-use development process, such as developers, property owners, property managers, lenders, and real-estate brokers, as well as members of the

public with experience and understanding relevant to one or more assessment zones. These discussions will be coordinated with the Development Code Update meetings to encourage land use/parking discussions and help limit the creation of “meeting fatigue.”

The goal of the discussions will be to assess the study findings and preliminary recommendations, to seek input on any perceived issues, opportunities, and related impacts from such changes. This includes understanding current decision-making around parking supply, and the extent to which changes to off-street requirements might remove barriers to investment in more and more affordable housing developments. It also includes insights into any unintended consequences that potential code updates might cause, as well as opportunities to avoid them while still advancing important code changes.

To support analysis of code change opportunities, the team will also seek Norman or regional cost data and information, including recent per-space costs for construction of on-site parking, parking fees charged to tenants (if any), and the rent premium associated with access to dedicated off-street parking. We anticipate that input will be gathered primarily from the WG, with additional outreach conducted as needed.

Discussions and interviews will be conducted in very small groups, without client attendance, to encourage frank discussions. Topics may include development finance issues, urban form considerations, discussion of other potential code updates, and development community coordination. The team will ask the City to provide available recent development application data as determined appropriate.

### **4.3 Draft Recommendations**

At the conclusion of this task, our team will develop a set of draft recommendations for the following.

- Parking Ratio Changes, by land use and context, including potentially introducing parking-maximum ratios
- Complimentary changes to the zoning code, such as reduced requirements or flexible maximums that are tied to mobility programs/amenities and/or parking management proposed for developments
- Supportive parking management recommendations, for realizing potential efficiencies within existing and future parking supplies:

Public-Private Partnerships

Pedestrian/Bicycle Connectivity Improvements

Area Specific Solutions

Added Public Parking Structures, Mobility Hubs, Loading Zones, Etc.

Public Parking Supply/Location Changes

Curb Management Solutions

Comprehensive Information Programs and Initiatives

Paid Parking Strategies

Accessibility and Ease of Use

Recommendations will be presented with key findings from previous tasks, highlighting data findings, best practices and case studies, and/or input from City staff and/or the WG that shaped their development and validate their potential to serve study objectives. Where applicable,

recommendations will be presented along with input from City staff and key stakeholders that identified the challenges they are meant to address, as well as any best-practice implementation examples that addressed similar risks linked to reduced parking requirements.

**Task 4 Deliverable: Draft Recommendations Memo** summarizing all task steps, analysis, and findings

### **Task 5 Final Comprehensive Parking Plan**

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All task-level deliverables will be finalized and compiled into a Comprehensive Parking Plan to document the Parking Study process, findings, and outcomes. This will culminate in a final set of recommendations that advance study goals, and a phased implementation plan to meet current and future parking needs.

#### **Task 5 Deliverable: Final Comprehensive Parking Plan**

- Draft of the Final Comprehensive Parking Plan
- Assumed to include at least two rounds of revisions, based on a consolidated set of non-conflicting comments provided by the City’s project manager for each round.
- Final Comprehensive Parking Plan – the following will be provided if requested:
  - Up to ten (10) bound, color copies of the final Study, in 8 ½ x 11 vertical format. Maps and illustrations will be reproducible in 8 ½ x 11 or 11 x 17 format. Maps included in study should be delivered as ESRI layer packages.
  - One (1) digital copy of the final Code in Microsoft Word and Adobe InDesign, Illustrator (for links and graphics) and Acrobat formats. The formats must allow for amendments, reproductions and direct web posting. Any maps included in study should be delivered as ESRI layer packages.

#### **Presentations:**

- Attending and presenting at up to two (2) Planning Commission meetings
- Attending and presenting at up to three (3) City Council and/or sub-committee meetings.