

## Exhibit A: Palmer Lake Final Scope of Work and Budget

TASK	SYNOPSIS	WHO	HOURS	COST <i>(combined rates)</i>	Work Products
<b>Phase 1. Community Analysis and Plan Review.</b>					
Task 1.0	Coordination with Town Administrator, materials for Advisory Team meeting on November 12	Cole	N/A	No charge	CMI will prepare materials for advisors prior to contract signing
Task 1.1	Provide Overview of Plan Update Process and Develop Key Measures of Success with Staff and all officials and advisory team members.	Cole	20	\$ 2,600	<ul style="list-style-type: none"> <li>· Measures of Success Worksheet</li> <li>· Tabulation of results from Trustees, Planning Commissioners and Advisors on worksheet</li> <li>· Summary of issues, opportunities, assets, and liabilities for inclusion on Town website and for Advisory Team</li> </ul>
Task 1.2	<ul style="list-style-type: none"> <li>· Prepare Advisory Team worksheet to aid in their review of current plan; provide examples of plan elements from other communities.</li> <li>· Review all existing plans, documents, ordinances, and conditions; update any factual text in current Plan that should be included in the new plan; annotate all existing plans; summarize policies and growth boundaries that influence or impact Palmer Lake's future</li> <li>· Prepare DRAFT Table of Contents based on input from the Advisors and measures of success worksheet for review.</li> </ul>	Cole + local staff time	25	\$ 3,250	<ul style="list-style-type: none"> <li>· Worksheet for Advisors to help in their review of the adopted Palmer Lake Plan.</li> <li>· Provide annotated outline of draft table of contents for review by the Advisors.</li> <li>· Review of all noted documents and prepare a summary of what is or will impact Palmer Lake's future.</li> </ul>

Task 1.3	<p>Update Town Base Map; prepare 3-Mile Planning Area Base Map; jurisdictional maps, public lands, environmental conditions, existing water and sewer lines, parks, open space and trails; create GIS zoning map with PDs shown (use GMS map layer); create special and metro districts, topography and street classification map utilizing <u>available data</u> from El Paso County. Boundaries will be shown but not individual parcels for a Comprehensive Plan.</p> <p>Any land use inventory will be updated to identify current land use patterns. CMI will provide directions to allow the advisors to conduct a field inventory to correct or verify the existing inventory of land uses.</p> <p>Acquisition of this base map data may require an agreement between the Town of Palmer Lake and El Paso County for use, ownership, and distribution of the information. It will be the Town's responsibility to sign any required agreement and assume any costs of getting this information to Community Matters. As noted in our proposal, we believe El Paso County is no longer charging for this information.</p>	Davenport and Cole - includes training for staff person on fundamentals of land use mapping.	100	\$ 10,000	<ul style="list-style-type: none"> <li>• Town Base Map</li> <li>• Existing Land Use Map (with assistance from the advisors)</li> <li>• Review and update as necessary the Town Zoning Map, format so all maps cover the same geographic area</li> <li>• 3-Mile Planning area base map</li> <li>• Map of environmental conditions (flood plain, topography, wildlife habitat, historic sites and structures)</li> <li>• Map of Political and Ownership Patterns (private land, public lands, including any federal or state-owned land)</li> <li>• Map of jurisdictional boundaries (municipalities, school district, water, and sanitation districts, Special and Metro Districts)</li> <li>• Map of existing water and sewer service lines (if available, assumes coordination with GMS)</li> </ul>
Task 1.4	<p>The Citizen Survey is the responsibility of the Advisory Team. CMI will rely on the Advisors to distribute the community survey to area stakeholders which we understand will only include residents and business owners. The Advisory Team will provide an initial analysis of the survey results. CMI will analyze both the raw data and survey results and provide an objective 3rd party analysis of the survey findings. These findings will be shared with the Advisors, Planning Commission and Board of Trustees.</p>	Haywood and Cole	20	\$ 2,600	<ul style="list-style-type: none"> <li>• Create final survey on Survey Monkey</li> <li>• Zoom meeting with advisors to review survey</li> <li>• Final survey available for distribution by advisors (they choose venues and distribution methods)</li> <li>• Provide survey results for distribution</li> </ul>
Task 1.5	<p>Introductory materials for the Advisory Group, worksheets and Worksession #1.</p>	Cole	20	\$ 2,600	<ul style="list-style-type: none"> <li>• Agenda</li> <li>• Packet with worksheet</li> </ul>
<b>Total for Phase 1</b>			<b>185</b>	<b>\$ 21,050</b>	

**Phase 2. Defining the Community's "Preferred Future"**

Task 2.1	Reconnaissance interviews by phone, and 'Meetings in a Box' Focus Group community engagement activity. Reconnaissance interviews should occur as soon as possible and include appointed and elected officials- I suggest we up the # of interviews given that we would want all BOT, PC and Advisors.	Cole to train volunteers to conduct focus groups Cole; confidential reconnaissance interviews by CMI team. This will include Advisors, Planning Commissioners, Trustees and Staff. (phone interviews and ZOOM training)	60	\$	7,300	<ul style="list-style-type: none"> <li>• Meeting in a Box training kit</li> <li>• Zoom Training with advisors</li> <li>• Up to 20 telephone reconnaissance interviews</li> <li>• Summary of reconnaissance interviews</li> <li>• Summary findings from Meeting in a Box and Zoom meeting with advisors to discuss their observations</li> </ul>
Task 2.2	Community Profile	Cole and Haywood	25	\$	3,250.00	2 page (1 sheet) community profile for use in economic development efforts
Task 2.3	3 Advisory Group Workshops via zoom or in person; any additional meeting, if needed can be facilitated via Zoom or with selected advisor – includes worksheets for Advisory Group, and recommendations that will inform plan elements- this will include new principles and policies for use in Development Review.	CMI team with staff assistance	60	\$	7,800	<ul style="list-style-type: none"> <li>• Agenda, packet material with worksheets for advisors</li> <li>• Summary of results- material will be used to draft plan elements</li> </ul>
Task 2.4	Build out analysis based on existing and proposed future land uses; to include a GIS shapefile that the Town can manage and update as development comes in based on growth.	Dlubac, Davenport, and Cole	60	\$	7,200	Population and employment estimates and projections in a spreadsheet format that can be aggregated into a variety of planning service areas.
Task 2.5	Update all factual information in the adopted Plan based on growth and servicing. This task includes updates to the classification of roadways, infrastructure services including taps and wastewater capacity by District, housing inventory, parks, open space, and trails inventory. We will welcome the advisors help in gathering information on the above items and to review the text.	CMI Team	60	\$	7,200	Draft of all factual information organized by chapter

**Total for Phase 2**

**265**

**\$**

**32,750**

**Phase 3. Development of Plan Elements**

Task 3.1	Draft the Plan Elements to include tourism/recreation element.	Team with review and comment by staff	100	\$	12,500	Draft Plan completed
Task 3.2	Mid-Course Review/Strategy Discussions.	Cole	8	\$	1,040	Conference zoom call with staff
Task 3.3	Meetings to Review the draft Comprehensive Plan (3 workshops) with Advisory Team and Planning Commission. (ZOOM)	Team with local staff attendance	60	\$	7,800	Facilitate discussion and update draft based on advisor and staff guidance
Task 3.4	Final Draft of Plan with emphasis on layout, graphics and maps and charts.	Team with staff support	45	\$	5,625	Final draft of Comprehensive Plan
<b>Total for Phase 3</b>			<b>213</b>		<b>\$26,965</b>	
<b>Phase 4. Presenting the Plan</b>						
Task 4.1	Community Open House with Listening Posts on all topic areas	Cole, Haywood, Davenport	30	\$	3,600	Community wide open house- Town to provide venue and refreshments
Task 4.1	Public Hearings [2] includes summary for elected and appointed officials, assumes Advisory Team will assist in presentation and discussion.	Cole or Davenport	30	\$	3,900	Attendance at 2 public hearings
Task 4.2	Final Comprehensive Plan Production.	Team	30	\$	3,750	
<b>Total Phase 4</b>			<b>90</b>		<b>\$11,250</b>	
<b>Phase 5.- Code Diagnosis</b>						
Task 5	Code Diagnosis and memo summarizing recommended changes to Palmer Lake's Zoning and PD ordinances.	Cole with Davenport and Dlubac	40	\$	5,000	Code diagnosis- annotated code and memo summarizing needed updates
<b>Phase 6- Intergovernmental Agreements and relationships</b>						
Task 6	Example IGAs for Town to consider and approach, Zoom meeting with staff and attorney to discuss relationships with area organizations and districts	Cole/Haywood	25	\$	3,250	Zoom meeting with staff, Mayor and Town attorney Memo outlining next steps and strategy to manage growth in the area surrounding Palmer Lake
<b>Phase 7: Plan Implementation and Financial Strategy</b>						
Task 7	No matter how hard a community works on a plan, it does no good if it sits on the shelf. The final task is to breakdown the work tasks, the individual and agency responsibilities, and the funding to make it happen for each tangible goal.	CMI Team	80	\$	10,000	Implementation Plan
<b>Total Phases 5, 6, 7</b>			<b>145</b>		<b>\$ 18,250</b>	
<b>Discretionary Funds for Use by Town as needed to ensure consensus</b>						

Telephone Consultations with Staff and other organizations as directed by Town Administrator.		Any CMI Team member	60	\$	7,800	This is a contingency fund for requests that are outside of the scope and can only be spent upon authorization by the Town Administrator for sole use of the consultant's time.
<b>TOTAL SERVICES</b>			<b>958</b>	<b>\$</b>	<b>118,065</b>	
<b>Estimated Expenses [CMI bills all expenses at actual cost and not included in budget]</b>						
Mileage	Assumes 8 trips to Palmer Lake @ .58 cents IRS rate Mileage rate of 54 cents a mile	50 miles each way x 2 ways x 8 trips	800 miles	\$	464	
Copies /Final Plan Production	To be produced by Town as PDF with Word Document for Staff; <i>recommend copies as local donation</i> ; Copies for meetings, draft maps , misc reproduction costs			\$	160	
map plots @ 24x36	Produced by Town as local contribution			\$	-	
<b>Total Estimated Expenses</b>				<b>\$</b>	<b>624</b>	
<b>Total Estimated Services and Expenses</b>				<b>\$</b>	<b>118,689</b>	