

EXHIBIT "A"

SCOPE OF SERVICES OUTLINE

Project Overview

The purpose of this study is to provide an analysis of current Commercial-Locational Criteria for Unincorporated Hillsborough County and analyze best practices resulting in updated policy for the Unincorporated Hillsborough Comprehensive Plan Future Land Use Element. This study will update the frameworks for allowing non-residential development in residential land use categories and balance the changing demands for retail and non-residential uses in residential areas based upon the continued need to prevent strip commercial along major roadways.

Project Objective

The objectives of this study include the following:

1. Evaluate the current structure of the Commercial-Locational Criteria (CLC) as referenced in the Objectives and Policies of the Future Land Use Element and the Livable Communities Element in the Unincorporated Hillsborough County Comprehensive Plan as it pertains to the relationship between commercial uses and the Future Land Use categories, urban and rural service areas, waiver requirements, infill and redevelopment, office, business professional use and industrial exceptions, proximity to residential developments, mixed use developments and the development of higher intensity non-residential land uses.
2. Obtain meaningful input from community stakeholders.
3. Literature review of best practices for commercial development in residential areas while continuing to minimize strip commercial development and evaluate the existing strip commercial development guidelines, particularly from the standpoint of ensuring they are implementable.
4. Recommend changes to the CLC policies given the relationship between other Future Land Use Policies such as incentives for mixed use, urban service and rural area policies and discouraging strip commercial development.
5. Evaluate the utilization of the existing adopted Highway Cost Affordable Long Range Transportation Plan for identifying intersections that meet the CLC requirements and the implications of using an existing or future functional classification map.
6. Review the current commercial land use categories (neighborhood commercial, general commercial, rural scale neighborhood commercial, community serving commercial, residential support uses and non-residential uses) and update definitions.
7. Produce proposed policy changes in a strikethrough underline format.

Scope of Work Tasks

Task 1. Project Kick-Off and Work Plan

This task will establish the fundamental objectives and responsibilities for the CLC update project by preparing and hosting a kick-off meeting with Planning Commission Staff and refining the Project Work Plan.

Task 1.1 Project Work Plan

Upon notice to proceed, the S&ME Team will draft a proposed Project Work Plan for discussion during the kick-off meeting. The Project Work Plan will establish the expectations for the assignment, as well as the project timeline, milestones, preferred methods of communication, and deliverables. The Project Work Plan will also include a list of potential stakeholder groups, possible case study locations, and propose potential layouts and themes for the final report. After the kick-off meeting, S&ME will revise the Project Work Plan to reflect any updates or changes requested by Planning Commission Staff.

Task 1.2 Kick-Off Meeting

The S&ME Team will schedule, prepare for, and facilitate a kick-off meeting with Planning Commission Staff. Prior to the meeting, S&ME will submit a copy of the draft Project Work Plan. Additionally, S&ME will begin its preliminary review of relevant planning documents, economic and land use trends, and GIS databases to allow for a more informed dialogue with Staff. During the meeting, members from both Planning Commission Staff and S&ME will introduce themselves, determine roles and primary points of contact, discuss the proposed Project Work Plan, identify potential stakeholders, detail potential public workshop dates and locations, establish the time and format of biweekly check-in meetings (additional/alternative in-person or virtual check-in meetings may be scheduled as needed over the course of the project), and coordinate methods of data collection and sharing.

During this meeting, Staff will also be highly encouraged to provide their perspectives on the challenges of implementing and/or enforcing the County's current CLC, identify potential opportunities for improvement, and share any additional desired outcomes for the project that were not listed within the RFP. This information will help contextualize and inform the direction of the research and analysis conducted during Task 2.

After the meeting, S&ME will revise the Project Work Plan to reflect any updates or changes to the project timeline, order of tasks, or project outcomes. The revised Project Work Plan, along with a kick-off meeting summary, will then be sent to Staff for review.

Task 1 Deliverables:

- Kick-Off Meeting and Summary
- Project Work Plan
- Virtual Biweekly Check-In Meetings (some may be in-person if necessary)

Task 2. Research and Analysis

This task will inform and establish the fundamental principles and innovations for the CLC update project by reviewing local planning documents, conducting a literature review of best practices, and examining comparable case studies.

Task 2.1 Local Planning Document Review

The existing conditions analysis will begin with a review of planning-related documents, reports, and studies relevant to the update of the CLC. This review will help establish the planning context for the update and generate synergy with previous, ongoing, or future planning initiatives which directly or indirectly impact commercial activity within the County. The documents to be reviewed during this phase of the project include but are not limited to the Future Land Use Element and the Corridors and Nodes Spreadsheet derived from the Livable Communities Element of the Hillsborough County Comprehensive Plan, Highway Cost Affordable Long Range Transportation Plan Map, Brandon Corridors and Mixed-Use Centers Pilot Project, the most recent Functional Roadway Classification Map, It's TIME Hillsborough 2045 Long Range Transportation Plan, and the Plan Hillsborough 2045 Long Range Growth Forecast reports. As part of this effort, S&ME will identify existing deficiencies of the County's current CLC provisions within the comprehensive plan, and will also examine the relationships between the CLC and other provisions within the Comprehensive Plan, including the Future Land Use Map, urban and rural service areas, waiver requirements, infill redevelopment, use exceptions, compatibility and buffering, mixed-use development, and minimum/maximum intensities for commercial development.

Task 2.2 Best Practices Literature Review

This task will include a comprehensive literature review of best practices for CLC from communities across the nation. These practices are likely to come from a combination of award-winning comprehensive plans, scholarly articles and research, economic development plans, and publications from the American Planning Association's Journal (JAPA), Planning Advisory Service (PAS) Reports, Memos, and QuickNotes.

In the context of a county, commercial locational criteria may be best implemented in two spectrums. For example, unincorporated Hillsborough County comprises very urban and rural areas which include different sets of challenges. In many communities, utilities have been the limiting factor on the location of development in a rural area. Whereas, roadway capacity and functional classification, land use mix, and public sentiment, have been the delimiters for commercial development in urban areas. Form and function of commercial development is a factor that tends to be overlooked and needs to be evaluated to ensure its cohesion within a neighborhood.

Additionally, the market for commercial/retail and commercial/office spaces is changing. With a larger portion of the retail market moving to online commerce and telecommuting becoming more acceptable since the pandemic, an existing surplus of both in the County is becoming increasingly likely. However, this does not mean the layout of the spaces and locations are desirable. There exists a great opportunity in the County to marry form, function, and location in the CLC that is both innovative and truly represents the changing marketplace.

Task 2.3 Case Studies

During this time, S&ME will also work closely with Planning Commission Staff to identify and select up to three comparable counties for case study selection where CLCs have had a noticeable impact on the reduction of strip commercial development, the harmony between commercial and residential development, the advancement of multi-modal activity, and the ability to service the daily needs of nearby residents. Ideal candidates for the case studies shall be comparable to Hillsborough County in terms of size, current and projected

populations, existing land use patterns, and aspirations for growth. Ideal case study counties will also have addressed issues currently facing the County, including retrofitting historic suburban sprawl, accommodating explosive levels of population growth, preserving significant environmental features in the face of rising development pressures, changing demands in the local and national commercial retail market, recovering from the economic and social devastation of COVID-19, strengthening community resiliency in light of rising sea levels and temperatures, and shifts in priorities to mobility and accessibility within the local transportation network.

The best practices found within each county will then be applied to three sites of Staff's choosing within unincorporated Hillsborough County to demonstrate how these practices would affect the future development of the site under each scenario. These case studies will be presented in a graphically rich format within the final CLC Recommendations Report. This will allow the public to envision the implementation of these CLC practices within their community.

Task 2 Deliverables:

- Memorandum summarizing the key findings of the local planning document review
- Memorandum summarizing the key findings of the literature review
- Memorandum describing the case studies and how their practices on allowing/establishing commercial nodes would apply to Hillsborough County

Task 3. Public Outreach

This task will empower the community to help inform and determine the direction of the CLC Update process by establishing a Public Engagement Plan, developing a project website, conducting stakeholder interviews, and hosting a public workshop.

Task 3.1 Public Engagement Plan

Our Team recognizes and appreciates the Planning Commission's emphasis on cultivating an engaging, equitable, and inclusive public engagement process. In S&ME's extensive experience with generating public input with our projects, the implementation of a thorough and comprehensive Public Engagement Plan often leads to more informed, context-sensitive, and community-backed results. Our firm looks forward to working with Planning Commission Staff early in the project's lifespan to craft a Public Engagement Plan which utilizes both in-person and online methods catered to the specific needs and desires of the Hillsborough County community. The following tasks detail the methods we propose to use.

Task 3.2 Project Website

One method of online engagement will be the project website, which will be created using the Social Pinpoint platform. This website will not only serve as a centralized hub for project-related data, but it will also be used to increase awareness, generate excitement, and inspire a wealth of deep and meaningful conversations about the project using the platform's variety of engagement features.

The Social Pinpoint offers a diverse range of public engagement tools. When developing the Public Engagement Plan, our Team will work closely with Planning Commission Staff to select up to three engagement tools which would be best suited for the project. This may include a brief **online survey** which can help inform the CLC update's overall direction and can be easily completed and shared by members of the community, a **Community Idea Wall**, which may function as an online forum which encourages participants to share their

ideas for the project, offer commentary regarding local issues and opportunities, pose questions, post photos, and respond to other users' comments, and/or other engagement tools such as **interactive polling** and **participatory budgeting**.

Task 3.3 Stakeholder Interviews and PC/BOCC Briefings

Using a listing curated by S&ME and Planning Commission Staff, our team will coordinate with the stakeholders to schedule interview sessions to discuss commercial development and the ongoing relationship between residential and nonresidential development within the unincorporated portions of Hillsborough County. Some suggested stakeholder groups include commercial developers who do regular business in the County, real estate agents, homeowner association representatives, and/or environmental advocacy groups. S&ME will host up to **three in-person or virtual stakeholder interview sessions** (with each session facilitated by a minimum of three S&ME Team Members if done in-person), which will be conducted in group settings. Group sessions will be organized by similar interests and backgrounds, such as local developers and financiers, business owners and managers, and homeowner's associations, and apartment owners. Questions and graphics for each interview session will be developed closely in tandem with Staff. Responses by interviewees will be summarized into a memorandum and provided to Staff for inclusion into the final CLC Recommendations Report.

Task 3.3 will also include briefings with the Hillsborough County City-County Planning Commission (PC) and Board of County Commissioners (BOCC). **One in-person briefing will be held with the PC** and will be attended by the Project Manager. The date, location, and venue of this briefing will be determined by S&ME, County Staff, and the PC during the development of the Public Engagement Plan.

The Project Manager will also work with Staff to schedule and host **remote, individual briefings with each of the seven members of the BOCC**. After all briefings have concluded, S&ME will provide Staff with two memorandums—one summarizing the input received during the PC workshop and the other synthesizing the findings of the BOCC briefings.

Task 3.4 Public Workshops

S&ME also plans to engage the public by facilitating **two public workshops** which will be hosted simultaneously online and in-person. The date, time, location, and method(s) of advertising for these workshops will be determined by Staff during the development of the Public Engagement Plan. These workshops will take place over two consecutive weeks or as close together as possible and be split between urban and rural areas of the County.

Our firm has successfully completed over a dozen multi-venue workshops within the past year for several of our comprehensive planning clients. At this meeting, S&ME will provide a brief presentation which will introduce the project team, discuss the purpose and intent of the CLC update, highlight existing conditions within the community related to the project, and identify opportunities for community input on the project website. Additionally, our Team will provide several activities for both the online and in-person audience. These activities may include, but are certainly not limited to, visual preference surveys for commercial development, mapping areas of the community in need of appropriately scaled commercial retail stores capable of serving their daily needs, breakout groups, and trivia. A summary of the workshop will be provided to Staff and incorporated into the CLC Recommendations Report, where appropriate.

Task 3 Deliverables:

- Public Engagement Plan
- Social Pinpoint Project Website
- Three Virtual Stakeholder Interview Sessions and Summaries
- One In-Person Briefing with the PC and Summary Memorandum
- Seven Virtual Briefings with the BOCC and Summary Memorandum
- Two Hybrid Public Workshops and Summaries

Task 4 Report Recommendations

This task will compile and synthesize the findings of the CLC Update process by developing and submitting two iterations of the CLC Recommendations Report and drafting a summary presentation for the Hillsborough County City-County PC and BOCC.

Task 4.1 CLC Recommendations Report (Draft #1)

Incorporating insights gained from the public workshops, stakeholder interview sessions, literature review, and case studies, S&ME will develop and submit the **first draft of the CLC Recommendations Report**. The Report will contain four primary elements:

1. A summary of the conclusions reached during Task 2 (Research and Analysis), including the assessment of local planning documents (Task 2.1), a review of best practices (Task 2.2), and the results of the three case studies (Task 2.3). An assessment which identifies existing deficiencies of the County's current CLC provisions within the comprehensive plan
2. A summary of input received during Task 3 (Public Outreach), which includes public workshops, stakeholder interview sessions, Hillsborough County City-County PC and BOCC briefings, and engagement tools on the project website
3. Text amendment revisions to the CLC (Objective 22 and its policies) and other CLC related policies in the FLUE in strikethrough and underline format
4. A summary of recommended changes to other elements, goals, objectives, and policies within the comprehensive plan which implement and/or affect the successful implementation of the proposed CLC revision. Examples may include definition revisions, future land use category amendments, and changes to provisions within the Livable Communities Element.

It should be noted that locating commercial uses at activity nodes along arterials and collectors is a common and well-documented practice. However, the connections back into the neighborhoods they are serving have been overlooked, which forces unnecessary vehicle trips out onto the County's major thoroughfares. Location, form and multimodal connectivity should be addressed in this context to truly maximize the function of future commercial lands. Revisions to the CLC will go beyond simply permitting commercial activities in specific areas of the County. Instead, the CLC will include context-sensitive policies to ensure commercial development is woven into the local, rural, suburban, or urban fabric and is an essential component of each neighborhood, along with recreational, institutional, and residential uses.

Task 4.2 CLC Recommendations Report (Draft #2)

S&ME will provide sufficient time for Planning Commission Staff to review the contents, organization, and presentation of the report. After this review period concludes and Staff provides their comments and questions to the Project Team, S&ME will complete **the second draft of the CLC Recommendation Report** and resubmit to Planning Commission Staff for further review.

Task 4.3 PowerPoint Presentation

Following the completion of the second draft of the CLC Recommendations Report, S&ME will prepare a summary presentation for the PC and BOCC. In collaboration with Staff, the presentation will include the assessment of local planning documents, the results of the research and analysis process, the findings of each case study, and the insights received during the public engagement process. The presentation will conclude by detailing the proposed amendments identified within the revised CLC Recommendations Report.

Task 4 Deliverables:

- First and Second Draft of CLC Recommendations Report
- PC and BOCC Workshop Presentations Summarizing the Report

Task 5 Report Refinement and Finalization

The final task will ensure the successful completion of the CLC Update project by hosting workshops with the PC and BOCC, submitting the final draft of the CLC Recommendations Report, and drafting a presentation for Staff which summarizes the Report's recommended amendments.

Task 5.1 PC Workshop

S&ME will host a workshop with the PC to present and obtain input on the second draft of the CLC Recommendations Report. The PC will be encouraged to provide feedback on the Report's contents, structure, and presentation. The PC comments will be summarized into a memorandum and shared with Planning Commission Staff.

Task 5.2 Board of County Commissioners Workshop 1

Shortly after concluding the workshop with the PC, S&ME will schedule and attend a workshop with the BOCC. At the workshop, our Team will give an updated version of the presentation prepared in Task 4, which includes the feedback received from the PC. The BOCC will be encouraged to provide comments, questions, and recommendations on the Report. Insights received from the BOCC during this workshop will be documented in a memorandum, which will be provided to Planning Commission Staff. Suggestions provided by the Board will also be incorporated into the **third draft of the CLC Recommendations Report** and submitted back to the County for another review.

Task 5.3 Board of County Commissioners Workshop 2 or Public Hearing

After the Board has been given sufficient time to review the updated CLC Recommendations Report, members of the Board will be given another opportunity to meet with the Project Team to discuss any further changes needed to the Report at a date, time, and venue of their choosing. If the BOCC proceeds with this workshop, the comments and suggestions received at the meeting will be summarized into a memorandum which will be provided to PC Staff. This workshop may be replaced by a public hearing.

Task 5.4 Final CLC Recommendations Report and Presentation Submittal

Our firm will begin packaging the **fourth (and final) version of the CLC Recommendations Report** and will prepare a presentation which summarizes the recommended changes to the CLC for use by Planning Commission Staff during the adoption phase of the comprehensive plan update process. S&ME will continue to act as a resource for PC Staff after the project concludes to answer questions or provide additional insights. Our Team will also remain on standby for additional services on an hourly basis, if needed.

Task 5 Deliverables:

- One Planning Commission Workshop and Summary
- Two BOCC Workshops and Summaries
- CLC Recommendations Report (Draft #3)
- Final CLC Recommendations Report & Presentation

Please note that individual briefings with each PC or BOCC member may be scheduled in lieu of a PC or BOCC workshop. These briefings shall be scheduled consecutively within a two-day timeframe to be determined by the Commission, if held in-person, unless the meetings are held virtually.

EXHIBIT "B"

Fee Schedule

The fixed-cost budget for completing all tasks described in this scope of work, products, and presentation is as follows:

All Tasks described in the Scope of Work

Task 1	\$6,479.00
Task 2	\$24,270.00
Task 3	\$23,730.00
Task 4	\$23,775.00
Task 5	\$21,746.00
Total	\$100,000.00

Note: This fixed-cost budget includes costs for all project labor, overhead rate, printing, equipment, and miscellaneous project-related expenses.

Invoicing: Upon completion of all tasks the Consultant shall invoice for the services rendered, not to exceed \$100,000.00. The invoice shall be sent to the contract managers (Melissa Lienhard and Andrea Papandrew) or designee.

EXHIBIT “C”

Project Timeline

	September	October	November	December	January	February	March
Task 1 - Project Kick-off and Work Plan							
Task 1.1 Project Work Plan	■						
Task 1.2 Kick-Off Meeting	◆						
Task 2. Research and Analysis							
Task 2.1 Local Planning Document Review	■						
Task 2.2 Best Practices Literature Review	■						
Task 2.3 Case Studies	■	■					
Task 3. Public Outreach							
Task 3.1 Public Engagement Plan	■						
Task 3.2 Project Website	■	■	■	■	■	■	
Task 3.3 Stakeholder Interviews & PC/BOCC Briefings		■	■	■	■	■	
Task 3.4 Two Public Workshops (Hybrid)			◆	◆			
Task 4. Report Recommendations							
Task 4.1 CLC Recommendations Report Draft #1			■	■			
Task 4.2 CLC Recommendations Report Draft #2				■	■		
Task 4.3 PowerPoint Presentation					■		
Task 5. Report Refinement and Finalization							
Task 5.1 PC Workshop						◆	
Task 5.2 BOCC Workshop 1 and Report Draft #3						■	
Task 5.3 BOCC Workshop 2 or Public Hearing							◆
Task 5.4 CLC Report Draft #4 (Final) and Presentation Submittal							■

- Staff Review
- Task Progress
- ◆ Milestones/Meetings/Workshops