



WORK ASSIGNMENT

WORK ASSIGNMENT NUMBER: _____

Pursuant to the Manatee County, Florida, Agreement for Planning Services entered into by and between MANATEE COUNTY, a political subdivision of the State of Florida, hereinafter referred to as "COUNTY" and Kimley-Horn and Associates, Inc., hereinafter referred to as "CONSULTANT," a determination has been made by COUNTY that there is a need for the performance of Services by CONSULTANT of a certain "Work Assignment" under the purview of said Agreement, and CONSULTANT is hereby authorized to perform or render the Services described as follows:

TITLE OF THE PROJECT: MANATEE COUNTY COMPREHENSIVE PLAN UPDATE

PHASES AND/OR TASKS OF PROFESSIONAL SERVICES AUTHORIZED:

CONSULTANT shall perform Tasks as more specifically detailed in Attachments 1 through 3 as follows:

Attachment 1: SCOPE OF SERVICES

Attachment 2: Hourly Fee Schedule

Attachment 3: Schedule

ATTACHMENT 1: SCOPE OF SERVICES

The project requires professional planning services for completion of the County's Comprehensive Plan ("Plan") update and corresponding amendments (collectively, "amendments"). It is understood the County undertook certain limited amendments beginning in 2018, adopted in 2022; however, those amendments are assumed to have been limited in scale. It is understood this review and update will be a complete assessment of the Plan and will be based on and or incorporate those items derived as part of the public involvement and stakeholder input as well as the Evaluation and Appraisal Report (EAR)-based review/recommendations and recommended best planning practices. Kimley-Horn will work with the County to define the project objectives including key updates to the respective Plan Elements and prepare the finalized schedule understood to be completed within 16-18 months excluding Public Hearings with the Board of County Commissioners (BOCC). Services shall include the following tasks (it should be noted that these tasks are not strictly sequential and there is overlap in tasks as described in the tasks below:

TASK 1 – PROJECT KICK-OFF AND COORDINATION PROCEDURES

- A. Kimley-Horn will meet with County staff one (1) time as a Project Kick-Off and secure readily available data. At this meeting, project organization and staff coordination guidelines/procedures will be established. It is understood, Kimley-Horn will facilitate a project progress call every two weeks with County staff to review the work assignments, project status, data/analysis needs, and similar, through the end of this assignment assumed not to exceed thirty-six (36) meetings. It is assumed up to two (2) Kimley-Horn team members will participate in each progress call and include the respective subject matter expert.
- B. Kimley-Horn will develop a community involvement and public outreach communication strategy for the update of the Comprehensive Plan. We will revise the strategy one (1) time based on County directed comments. The strategy will identify specific components of public involvement including a preliminary schedule of milestones for outreach and public comment. Due to the size and geography of the County, it is understood public outreach will be a combination of in-person and virtual meetings (hybrid format). It is also understood that regional ("neighborhood") oriented meetings are requested similar to those undertaken by Kimley-Horn as part of the Pars Recreation and Open Space (PROS) Master Plan. It is assumed that up to ten (10) community workshops (Northeast, Northwest, Southwest, Southeast, Central) assuming one kick-off/workshop in each area initially and a secondary meeting soliciting input further in the process. Kimley-Horn will provide a separate public involvement plan.
- C. BOCC One-on-One Meetings. It is assumed Kimley-Horn will assist County staff to participate in one-on-one meetings with the BOCC. Kimley-Horn will participate in up to two (2) meetings each with the BOCC members as part of this project.

Tasks to be completed/Deliverable:

- Project Kick-Off meeting

- Prepare and refine Planning and Community Involvement in the form of a Public Involvement Plan (PIP). It is understood community involvement will be led by Kimley-Horn with support from County staff.
- BOCC One-on-One meetings.
- Bi-weekly project calls; summary review memorandum/email

TASK 2 – DATA COLLECTION

- A. Kimley-Horn will collect data for the amendments; and assess changes to the comprehensive plan since the County's last Comprehensive Plan update. Kimley-Horn will rely on information provided by the County / County Departments in the evaluation of the plan (including adopted master plans). Kimley-Horn will also utilize readily available data from the DEO, Florida Department of Transportation (FDOT), Tampa Bay Regional Planning Council (TBRPC), and the Office of Economic and Demographic Research; 2020 US Census Bureau data will also be utilized as may be available. It is understood, the County has prepared certain EAR-Based amendments dating to 2018 including review based on the Florida Statutes and has provided that to Kimley-Horn for use in its review and assessment.

Tasks to be completed/Deliverable:

- Initial assessment matrix of the Comprehensive Plan including additional Growth Management Statutory changes since the last EAR.
- Identification of necessary (recommended) data sources and initiate obtain data necessary to the Plan review.

TASK 3 – CURRENT PLAN ANALYSIS & DATA INVENTORY AND ANALYSIS (DIA)

Kimley-Horn will assess the information and data collected in the previous tasks as it relates to each of the County's comprehensive plan elements. Specifically, the following actions will occur:

- A. Review the Plan for consistency with adopted State and regional requirements, since the last EAR/Update. We will also identify language of the current Plan that is regulatory in nature and more appropriate to the Land Development Code. Review will also include recommendations based on current trends, best planning practices and input received during the public involvement process.
- B. Develop a draft review "Matrix" of recommended GOPs for amendment including justification(s). Includes review with staff and presentation up to two (2) total (assumed to be one meeting with each) to the Planning Commission or the Board of County Commissioners for discussion and to receive comments; this draft matrix will serve as the basis for the future work efforts (i.e., amendments). During these meetings, Kimley-Horn will explain the project schedule and the pending (recommended) amendments and what those may contain (see Task 3.C below).
- C. As part of Task 3, Kimley-Horn will identify the County's existing land use and development totals utilizing information from the County (i.e., development review approvals, site and

building permits, and similar) along with the latest information from the Property Appraiser's office and any relevant studies completed since the adoption of the last amendment. This will provide a snapshot of the current development and impacts as compared to the County's current carrying capacity per the adopted Comprehensive Development Plan/Future Land Use designations. Based on the recommended amendments from the initial assessment, our team would analyze and prepare the necessary Data Inventory and Analysis (DIAs) and Maps for each Chapter (Element) of the Comprehensive Plan excluding the Schools Element. Currently, the County's Elements has ten (10) Elements including:

1. Definitions
2. Future Land Use (including review and recommendation of the FDAB)
3. Conservation
4. Coastal Management
5. Transportation
6. Housing
7. Historic and Cultural
8. Recreation and Open Space
9. Public Facilities (including utilities level of service and relation to the FDAB)
10. Capital Improvements
11. Intergovernmental Coordination
12. Public School Facilities (not included)
13. Property Rights Element

Due to the nature of the Public School Facilities Element, it is understood, information and updates of that specific element will be based on/provided by Manatee County Schools long range planning / facilities plans; no new analysis as it relates to student population, school siting or similar will be provided by Kimley-Horn.

With respect to the Coastal Management, Kimley-Horn will use readily available mapping and data to identify Coastal High Hazard Area (CHHA) and related areas. Kimley-Horn will propose policies that address resiliency and sea level rise in a generalized manner as part of the update. Kimley-Horn will not undertake a detailed vulnerability analysis as to the impacts of sea-level rise or a post-disaster redevelopment plan as part of this assignment. If the County desires to prepare a Sea Level Rise / Resiliency Assessment and or a post-disaster redevelopment plan, Kimley-Horn can provide those as an additional service.

- D. This information further serves as the foundation for the update to the specific GOPs. During this time, Kimley-Horn would coordinate with the various County departments along with applicable County and Regional agencies to obtain the necessary information for the analysis (DIA) including data from the Geographic Information System department; this digital data will be used not only for the analysis but also in the preparation of the map series. We would also prepare the baseline population projection estimates for the County using readily available information from the Office of Economic and Demographic Research and Manatee County.

This analysis will also result in a physical existing conditions analysis of land uses, focal points, infrastructure, environmental features and resources, traffic patterns and bike/ped facilities which forms the basis of the Data Inventory and Analysis (DIA). It is understood the DIA will be updated for each Element update (based on the Elements/updates listed in 3.C. It is understood other studies including but not limited to the Vulnerability Assessment and the Water Supply Plan.

- E. Specific to the transportation LOS and needs, conditions will be evaluated for existing, 5-year horizon, and the long-term planning horizon for the County's Comprehensive Plan. It is understood the County's Traffic Circulation Plan horizon year is tied to the latest available travel demand models that the Sarasota Manatee MPO based on their Long-Range Transportation Plan (horizon year 2045). The end results of analyzing future transportation needs will be the development of a coordinated Mobility Plan which addresses all modes of travel.
1. Existing Conditions – Kimley-Horn will use available traffic counts to identify existing LOS for roadways within the County. Kimley-Horn will also evaluate transit, bicycle, and pedestrian facilities, and identify existing LOS for each of these modes. Maps and tables of transportation infrastructure and operating conditions will be developed, including the identification of existing needs for all modes.
 2. 2028 Conditions (i.e., 5-year horizon) – Kimley-Horn will use historic trends to project 2028 traffic volumes and will identify the 2028 LOS for roadways within the County. Maps and tables of transportation infrastructure and operating conditions will be developed, including the identification of 2025 system needs for all modes.
 3. 2045 – Kimley-Horn will coordinate with the County with respect to the consideration of historic trends, to project 2040 (2045) traffic volumes and will identify the 2040 (2045) LOS for roadways with the County. Maps and tables of transportation infrastructure and operating conditions will be developed, including the identification of 2040 system needs for all modes.
 4. Kimley-Horn will run the model for 2020, or latest as available, to check its accuracy to project current traffic volumes. Variations will be noted and considered when projecting 2045 conditions.
 5. Kimley-Horn will run the model for 2045, review results and compare to historic trends and consider model variations observed in the 2020 run, to identify projected 2045 traffic volumes. Based on County review and comment, it is understood data collection and analysis efforts are assumed to estimate:
 - LOS for base conditions (2023 counts or estimates),
 - LOS for projected five-year conditions (2028 as estimated using counts plus reserved trips or growth), and
 - LOS for projected horizon year conditions (2045 model-based) with some checks & corrections for congruence between five-year and horizon year results.

7. Land Use Densities and Intensities – As required by FS 163.3177(6)(b)2.e., Kimley-Horn will work with the County to identify land use densities and intensities within the County along transit routes and corridors for existing, 2028 and 2045 conditions. This information will be used to assess transit service options.
 8. Mobility Plan – Kimley-Horn will update the County's Transportation Element to include identification of improvements by mode (roadway, transit, bicycle and pedestrian/trails) to address future needs. Improvements will be identified for each planning period (2028 and 2045).
- F. Revise the draft review "Matrix" of recommended GOPs for amendment including justification(s) based on the additional DIA conducted in support of the amendments. Includes review with staff and presentation one (1) time to, Planning Commission and County Council for approval; this matrix will serve as the basis for the Comprehensive Plan amendments.
 - G. Kimley-Horn will prepare an existing conditions analysis which will include a preliminary review of existing County land use, infrastructure and public facilities, and initial LOS analysis of items identified within the Capital Improvements.

Tasks to be completed/Deliverable:

- Prepare a (finalized) review matrix of the existing Comprehensive Plan including recommendations for amendments to the County's Plan.
- Prepare an existing conditions analysis including preliminary Data Inventory and Analysis.

TASK 4 - UPDATE GOALS, OBJECTIVES AND POLICIES (GOPs)

- A. Based on the findings of Task 3, Kimley-Horn will update the GOPs for each of the comprehensive plan elements specific to the review matrix. It is understood Kimley-Horn will not undertake an update to the County's Water Supply Facilities Master Plan (prepared by others under separate contract with the County) or similar utility studies as part of this assignment but will incorporate those, by reference. Draft GOPs will be presented to County staff for review and comment. Kimley-Horn will respond to up to two rounds of revisions to the draft GOPs based upon staff review. County staff will be responsible for compiling and submitting one set of review comments to Kimley-Horn.
- B. Kimley-Horn will conduct up to three (3) progress meetings with the BOCC. These progress meetings will be a hands-on session intended to keep the Commission and County staff aware of the project process, outcomes, and anticipated recommendations. It is assumed up to two (2) team members will be present for the workshops.

Tasks to be completed/Deliverable:

- Preparation of draft Goals, Objectives, and Policies and Standards.
- Present at up to three (3) progress meetings including up to two (2) team members.
- Compiled GOPs and DIAs including Maps / Map Series in hard copy and digital format.

TASK 5 - LOCAL PLANNING AGENCY (LPA) HEARING AND COUNTY COUNCIL HEARING– TRANSMITTAL

- A. Kimley-Horn will present the DIAs and GOPs in cooperation with County staff to the Planning Commission up to two (2) times sitting as the Local Planning Agency (LPA) for review and comment at a publicly noticed hearing. The County will be responsible for providing the meeting place and meeting advertisement/public notices.
- B. Following the Planning Commission hearing, Kimley-Horn will revise the Comprehensive Plan one (1) based on comments received during the Planning Commission public hearing. The revised Plan will be provided to County staff for up to three (3) hearings before the BOCC (Transmittal Hearing), County staff will be responsible for submitting the proposed Comprehensive Plan to DEO and the other reviewing agencies for comment.

Tasks to be completed/Deliverable:

- Presentation each to the Planning Commission and the BOCC for transmittal of the draft DIA and GOPs.

TASK 6 - RESPONSE TO ORC REPORT

Kimley-Horn will assist the County to respond to one (1) set of comments through the objections, recommendations and comments (ORC) report.

Tasks to be completed/Deliverable:

- Response to one set of comments through the ORC Report
- Revisions to the GOPs per ORC Report. Compiled GOPs and DIAs including Maps / Map Series in hard copy and digital format.

TASK 7 - BOCC HEARING – ADOPTION

Kimley-Horn will present the final DIAs and GOPs in cooperation with County staff to the BOCC for review and adoption of the Comprehensive Plan amendments including revisions per the ORC at a publicly noticed hearing. The County will be responsible for providing the meeting place and meeting advertisement/public notices.

Tasks to be completed/Deliverable:

- One presentation to the BOCC for adoption of the amendments post ORC Report and responses.

TASK 8 - OPTIONAL TASK

A. Market and Economic Analysis

The assessment of development potential in the County through the planning horizon, based on results of the market study, will guide the development of new goals and objectives related to land use changes and development.

This task will combine quantitative demographic and economic, and real estate data with qualitative research to identify future development and/or redevelopment opportunities defined by the County. Qualitative research will be gathered through a series of stakeholder interviews with community leaders, area businesses, local civic and cultural organizations, and educational and non-profit anchors. Research will also be conducted to identify economic and market forces impacting the County, including major public and private investments. The tasks associated with the market study are described below.

1. **Demographic Analysis** – Analyze population and household trends for the County and compare these trends to Port Orange. Demographic and socioeconomic factors will include income, age, and race. In addition to standard demographic sources, Kimley-Horn will also review market data provided by the State of Florida and local stakeholders prior to the completion of the demand forecasts.
2. **Residential Analysis** – Collect and analyze housing data by tenure, type, and growth in number of units. An analysis of for-sale and rental housing market trends for a submarket incorporating the County will also be completed. New for-sale and rental housing that could be supported in the County will be forecasted for the planning period.
3. **Retail Analysis** – Provide an overview of retail absorption, vacancy, and rent trends for a submarket incorporating the County. As available, leasing data from major retail centers will be incorporated. Kimley-Horn will forecast household expenditure potential growth by major retail category and estimate the sales capture for the County based on the geographic distribution of existing competitive retail centers. Estimate the potential amount of “inflow” spending from tourists at the nearby beaches based in part on input from economic developers and local tourism industry representatives. Determine the demand for additional retail services that could be supported by type during the planning period.
4. **Office and Industrial Analysis** – Provide an overview of office and industrial absorption, vacancy, and rents for a submarket containing the County and forecast the demand for additional square footage that could be supported during the planning period. The office forecast will be based in part on job projections for the County.

PRELIMINARY STAFFING PLAN

The Following Team Members have been identified to perform certain tasks related to the review and update of the Comprehensive Plan. This list is understood to not be limited in nature but to identify the key team members assigned to facilitate Tasks and or assignments.

1. Definitions: Team:
2. Future Land Use: **Kelley Klepper***, Monet Moore*, Heather Glisson, Trevor Poole
3. Conservation: **Tori Bachelor**, Ronnie VanFleet, Sarah Johnson*
4. Coastal Management: Tori Bachelor, **Chris Niforatos**, Macy Falcon
5. Transportation: **Adam Kerr**, Ryan Suarez (transit)*, Chad Davis, Amanda Black, Trevor Poole
6. Housing: **Heather Glisson**, Monet Moore
7. Historic and Cultural: **Blair Knighting**, Monet Moore
8. Recreation and Open Space: Kelley Klepper, **Ed Dean***, Kelsie Shy*
9. Public Facilities: **Molly Williams** (Stormwater), **Jordan Walker** (Utilities)*, Jeff Goodwin
10. Capital Improvements: Team
11. Intergovernmental Coordination: Kelley Klepper, **Monet Moore**, Heather Glisson,
12. Public School Facilities (not included)
13. Property Rights Element: Monet Moore, Heather Glisson

FEES AND EXPENSES

Compensation to CONSULTANT for rendering all of the above identified Services shall not exceed \$354,500 Compensation for the Tasks shall not exceed the amounts set forth as follows:

TASK	DESCRIPTION	FEE AMOUNT
1.0	PROJECT KICK-OFF AND COORDINATION PROCEDURES	\$30,000
2.0	DATA COLLECTION	\$38,000
3.0	CURRENT PLAN ANALYSIS & DATA INVENTORY AND ANALYSIS (DIA)	\$130,000
4.0	UPDATE GOALS, OBJECTIVES AND POLICIES (GOPs)	\$72,000
5.0	LOCAL PLANNING AGENCY (LPA) HEARING AND COUNTY COUNCIL HEARING- TRANSMITTAL (includes Team/Progress Review Meetings)	\$62,000
6.0	RESPONSE TO ORC REPORT	\$15,000
7.0	BOCC HEARING – ADOPTION	\$7,500


8.0	OPTIONAL TASK	TBD
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COUNTY may authorize, in writing, in advance, adjustments in the compensation for particular Tasks established above, providing such adjustments do not exceed the maximum compensation authorized for this Work Assignment.

Partial compensation may be requested on a monthly basis for unit prices and actual hours incurred but not to exceed the percentage of the Task completed.

CONSULTANT agrees to perform the Services in accordance with this Agreement No. 20-R075115BB for Planning Services and this Work Assignment dated.

KIMLEY-HORN AND ASSOCIATES, INC.

BY: 

PRINTED NAME: B. Kelley Klepper

TITLE: Vice President

DATE: April 24, 2023

MANATEE COUNTY, a political subdivision of the State of Florida

Jacob Erickson, MBA, CPPO, NIGP-CPP
Digitally signed by Jacob Erickson, MBA, CPPO, NIGP-CPP
Date: 2023.05.15 08:51:33 -04'00'

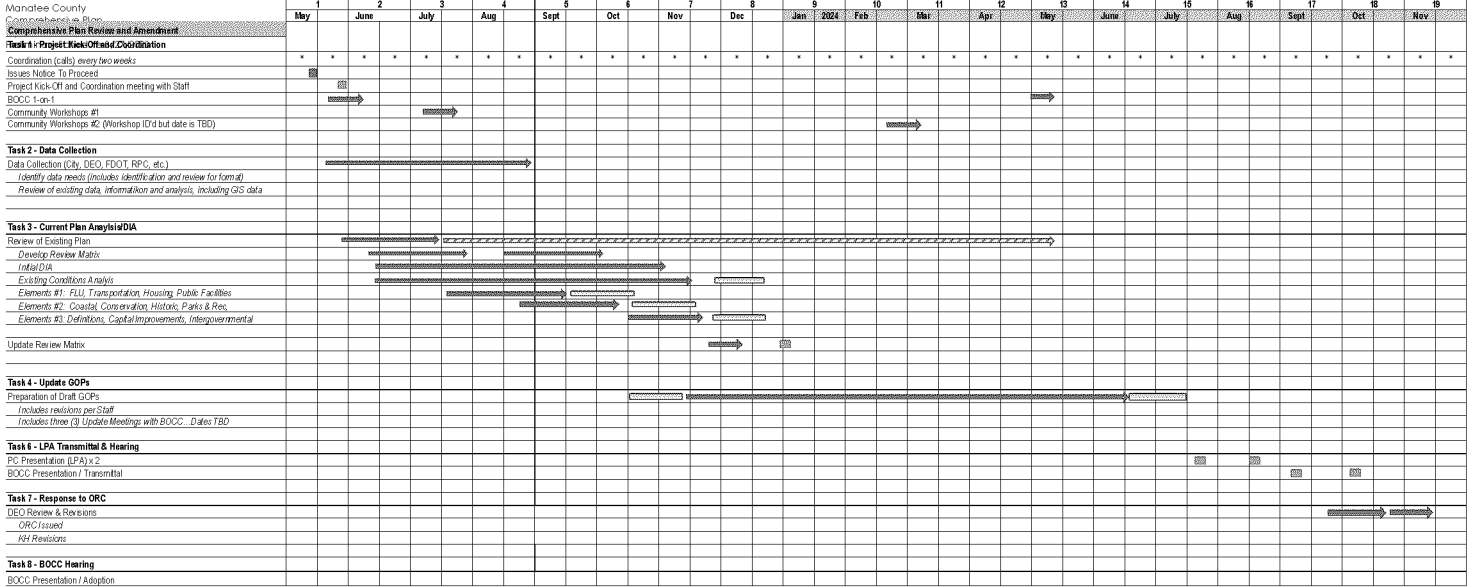
Jacob Erickson, MBA, CPPO, NIGP-CPP
Procurement Official

DATE: May 15, 2023

Project Work Plan: Person-Hour Estimate
 Manatee County Comprehensive Plan
 Work Assignment No. 1 Agreement No. # _____

Task	Project Manager/Principal Planner		Senior Engineer		Senior Professional		Professional		Analyst		Graphics/Designer		Administration		HOURS	COST	Misc Direct Expense
	Rate	\$270.00	Rate	\$235.00	Rate	\$170.00	Rate	\$145.00	Rate	\$125.00	Rate	\$110.00	Rate	\$105.00	Sub Total	Sub Total	
	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	Hours	Fee	
Task 1 - Project Kick-Off & Coordination	36	\$9,720.00	27	\$6,345.00	18	\$3,060.00	34	\$4,930.00	18	\$2,250.00	18	\$1,980.00	12	\$1,260.00	163	\$29,545.00	\$500.00
Task 2 - Data Collection	26	\$7,020.00	22	\$5,170.00	48	\$8,160.00	49	\$7,105.00	64	\$8,000.00	0	\$0.00	24	\$2,520.00	233	\$37,975.00	
Task 3 - Current Plan Analysis & DIA	118	\$31,860.00	128	\$30,080.00	175	\$29,750.00	156	\$22,620.00	117	\$14,625.00	0	\$0.00	10	\$1,050.00	704	\$129,985.00	\$0.00
Task 4 - Update GOPs	94	\$25,380.00	68	\$15,980.00	74	\$12,580.00	84	\$12,180.00	42	\$5,250.00	0	\$0.00	6	\$630.00	368	\$72,000.00	
Task 5 - LPA Hearing and County Commission Hearings	54	\$14,580.00	54	\$12,690.00	84	\$14,280.00	83	\$12,035.00	57	\$7,125.00	0	\$0.00	7	\$735.00	339	\$61,445.00	\$500.00
Task 6 - Response to ORC	14	\$3,780.00	14	\$3,290.00	16	\$2,720.00	22	\$3,190.00	12	\$1,500.00	0	\$0.00	5	\$525.00	83	\$15,005.00	
Task 7 - BOCC Hearing Adoption	12	\$3,240.00	7	\$1,645.00	8	\$1,360.00	3	\$435.00	0	\$0.00	0	\$0.00	5	\$525.00	35	\$7,205.00	\$250.00
Optional Task - TBD																	
Totals	354	\$95,580.00	320	\$75,200.00	423	\$71,910.00	431	\$62,495.00	310	\$38,750.00	18	\$1,980.00	69.0	\$7,245.00	1,925	\$353,160.00	\$1,250.00

Total Cost: \$354,410.00



Notes:
Project Schedules Are Tentative and May Fluctuate Based on Staff Direction and Public Hearing Schedules including required public notifications.

