

Attachment A
Scope of Work

Task 1: Identify Sites for Development

Subtask 1-1: Attend Initial Meetings

The Consultants will attend initial meetings with Amherst representatives including a meeting with key staff such as the Senior Planner, Nathaniel Malloy, and potentially the Town Planner and Town Manager to discuss the project, including this Scope of Work. We will also work with Mr. Malloy to arrange a meeting with the Amherst Affordable Housing Trust that would ideally include representatives of other appropriate boards or committees, such as the Planning Board and newly formed Real Property Advisory Group, to once again review the Scope of Work and discuss the fundamentals of an outreach strategy including a list of those to interview as part of the site identification process.

It would also be useful to have an opportunity to tour various potential locations with Mr. Malloy prior to or following the meetings to view and discuss challenges and opportunities on-site. It would also be helpful to have preliminary information on already identified potential sites before the meeting – surveys if available, or addresses for google earth review.

It should also be noted that the Consultants will attend regular meetings with key Town staff, the Amherst Affordable Housing Trust, and other local leaders as deemed appropriate during the course of this project.

Timeframe for Completion: Within 1 month of contract execution

Division of Responsibilities: Karen Sunnarborg Consulting (KSC) and Abacus Architects + Planners (AA+P)

Fee: \$2,000.00 (\$1,000.00 for Karen Sunnarborg Consulting/KSC and \$1,000.00 for Abacus Architects + Planners/AA+P)

Subtask 1-2: Prepare and Conduct an Outreach Strategy

Based on input from the initial meetings, the Consultants will prepare a detailed Outreach Strategy that will include the following major components:

- *Interview List*
Informed by the initial meetings as well as discussions during project work, the Consultants will compile a list of individuals with contact information for representatives from various entities to interview about potential sites and development partnerships. This would include key representatives of local boards and committees, the Valley CDC, educational institutions, real estate agencies, other non-profit and for profit developers, and those additional individuals recommended as part of the process.

- *Identification of Interviewers*
It will also be important to identify who will take the lead in conducting each interview including which Consultant or Consultants together and which, if any, Town

representative should also attend. The Consultants are sensitive to the political nature of many of these meetings and want to insure that the Town is involved as it deems feasible and appropriate. It will also be determined which individuals should be interviewed in person versus those who can be contacted by phone.

- *Interview Schedule*
The Outreach Strategy will include a schedule of meetings, identifying the lead interviewer, person to be interviewed, including title and organization, as well as the date, time, and location.
- *Interview Summaries*
The Lead Interviewer will be responsible for summarizing the results of the interview and identifying next steps as appropriate.
- *Pubic Process*
The Outreach Strategy will also include a summary of the public process that will be conducted to obtain local input on the Site Selection Criteria and potential development sites that is recommended to occur under Subtask 1-6.

This Outreach Strategy will be updated regularly and shared with the Town as progress is made in the interview process, adding new contacts, updating schedules, and incorporating interview summaries.

Timeframe for Completion: The initial Outreach Strategy will be completed within 6 weeks of contract execution with most of the interviews completed within 4 months of contract execution.

Division of Responsibilities: KSC will prepare the Outreach Strategy with AA+P support and Town input. Both KSC and AA+P will divide responsibility of various interviews as appropriate.

Fee: \$6,000.00 (\$4,500.00 for KSC and \$1,500.00 for AA+P)

Subtask 1-3: Prepare a Site Analysis Strategy

The Consultants will draft a strategy to assist in its process of identifying and analyzing sites for potential development. This Site Analysis Strategy will include the following major components:

- *Identification of Site Selection Criteria*
This work involves developing a prioritized list of site selection/project review criteria for consideration that will guide a preliminary ranking of the identified potential development opportunities under Subtask 1-4. This will include a graphics component.
- *Identification of Local Resources*
The Consultants will work with the Town on identifying local resources to support site identification and analysis including but not limited to GIS mapping, Assessor's property records, planning files, and other records that could be helpful in undertaking this work.

Timeframe for Completion: Within 2 months of contract execution.

Division of Responsibilities: KSC will draft the Site Analysis Strategy with AA+P support and Town input.

Fee: \$4,500.00 (\$1,500.00 for KSC and \$3,000.00 for AA+P)

Subtask 1-4: Identify Appropriate Development Sites

The Consultants will conduct research and analysis on previously identified sites, including the three Town-owned properties that were preliminarily identified by the Housing Trust as well as other potential private development sites. Discussions during the initial meetings under Subtask 1-1 and work that was undertaken as part of preparing the Housing Production Plan will be helpful in initiating this work but more critically will be research on additional private development opportunities. Major components of this Subtask include:

- *Property Lists*
The Consultants will prepare an inventory of potential properties and remove or expand this list as progress is made in the interview process and site analysis work.
- *Site Visits*
Site visits to these properties as well as general locations where somewhat denser housing might be more appropriate (including potential Chapter 40R locations) will be conducted, followed up by research on particular properties. A summary description accompanied by photos will be provided for each identified property or general location.
- *Site Summaries and Evaluations*
Using the Site Selection Criteria identified in Subtask 1-3, the Consultants will evaluate identified properties offering the opportunities and challenges of each site as well as a preliminary ranking. These Summaries will include a zoning analysis, maps and photos as well as other descriptive information to provide the context for discussing the sites further with the Town and ranking sites.

Timeframe for Completion: Within 7 months of contract execution.

Division of Responsibilities: AA+P will take the lead on this Subtask with support from KSC on the research and the Site Summaries.

Fee: \$9,000.00 (\$2,000.00 for KSC and \$7,000.00 for AA+P)

Subtask 1-5: Prepare Schematic Designs and Model Case Studies

The Consultants will undertake further follow-up work for those sites that rank the highest under Subtask 1-4 and are judged by the Town to have the greatest promise. This work will include the following major components:

- *Schematic Designs*

AAP will develop conceptual site planning, 3D modeling and massing drawings to clarify proposed site coverage, approximate unit count, non-residential components, and the impact of the massing on the surrounding context for the top three ranking sites.

- *Case Studies*

KSC will develop case studies of effective development models that have been used in Amherst and other relatively comparable communities that might be applicable to the development of particular sites. These case studies will include information on the historic context, project description (location, developer, type of project, number of units, etc.), and financing with accompanying photos and other visuals.

Timeframe for Completion: Within 10 months of contract execution.

Division of Responsibilities: AA+P will prepare the schematic designs and KSC will develop the case studies.

Fee: \$9,000.00 (\$1,500.00 for KSC and \$7,500.00 for AA+P)

Subtask 1-6: Conduct a Public Forum

The Consultants will help the Town facilitate a public forum to present the findings of the project to date and obtain community feedback on specific site selection criteria and identified properties. This will include a PowerPoint presentation which highlights the key recommendations.

Timeframe for Completion: Within 11 months of contract execution

Division of Responsibilities: Both KSC and AA+P will be involved in this Subtask.

Fee: \$2,000.00 (\$1,000.00 for KSC and \$1,000.00 for AA+P)

Subtask 1-7: Provide Technical Support for the Town as Needed

The Consultants will provide further technical support for the Town as it moves forward in deliberations with various property owners as needed. This support might involve further discussions regarding design, density and financing issues for example.

Task 2: Identify and Create a Chapter 40R Smart Growth Overlay District

Subtask 2-1: Attend Initial Meetings

See Subtask 1-1 which will also address the Scope of Work for this Subtask.

Subtask 2-2: Identify the District Location

As part of the work included under Subtask 1-4, the Consultants will work with Town staff, the Amherst Affordable Housing Trust, and the Planning Board to identify areas of the community that are most appropriate for a Chapter 40R Smart Growth Overlay District, offering pro's and con's for each potential area. Included under this Subtask are a zoning analysis as well as mapping, potential 3D modeling and photography that pertain to potential locations for discussion through the meetings identified below. This Subtask will also involve

recommendations regarding district boundary options with an accompanying analysis of projected number of units.

Timeframe for Completion: Within 8 months of contract execution

Division of Responsibilities: AA+P will take the lead on this Subtask with KSC providing support on the analysis of locational options, zoning analysis, and projected number of units.

Fee: \$4,500.00 (\$1,500.00 for KSC and \$3,000.00 for AA+P)

Subtask 2-3: Prepare the Draft Bylaw

KSC and AA+P will draft the bylaw based on discussions under Subtask 1 and other model bylaws from comparable communities, also in conformance with relevant local zoning provisions. AA+P will focus on design guidelines with KSC drafting the other sections.

Timeframe for Completion: Within 10 months of contract execution

Division of Responsibilities: KSC will draft the bylaw with AA+P providing important design guidelines for inclusion in the zoning.

Fee: \$10,500.00 (\$6,500.00 for KSC and \$4,000.00 for AA+P)

Subtask 2-4: Conduct a Public Forum

The Consultants will conduct a public forum to present the draft bylaw and obtain community feedback. The key components of the bylaw will be presented through a PowerPoint presentation. The discussion following this presentation will be helpful in determining important changes to the draft bylaw prior to submitting it to DHCD for approval in consultation with staff, the Amherst Affordable Housing Trust and the Planning Board.

Timeframe for Completion: Within 11 months of contract execution

Division of Responsibilities: Both KSC and AA+P will be involved in this Subtask.

Fee: \$2,000.00 (\$1,000.00 for KSC and \$1,000.00 for AA+P)

Task 1 Subtotal Fee: \$32,500.00 (\$11,500.00 for KSC and \$21,000.00 for AA+P)

Task 2 Subtotal Fee: \$17,000.00 (\$9,000.00 for KSC and \$8,000.00 for AA+P)

Total Fee: \$49,500.00 (Includes 10% local match; \$4,950)