

## Attachment A: Scope of Services

The scope of services described below includes:

- *Snapshot and Projections: Analyzing Excelsior Springs' Existing Conditions and Future Growth Possibilities*
- *Goals and Principles: A Community Consensus for the Development Vision*
- *City Development Framework*
- *Comprehensive Plan Elements*
- *Implementing and Financing the Plan*

### Part I: Snapshot and Projections

This component of the Excelsior Springs Plan identifies existing conditions and contexts. This provides the demographic and economic facts and trends that help to define specific plan directions. Elements of the work program are as follows:

#### 1.1 Demographics and Economic Snapshot

This component involves a detailed review of population and economic factors and projections. The snapshot includes:

- A. Review of population change and growth rates over time.
- B. Analysis of growth and migration trends to provide a complete picture of community population dynamics, including growth rates, historic migration patterns, age cohort changes, school enrollment, and birth rates.
- C. Consideration of potential regional developments which may impact growth, including the regional airport and development within the Excelsior Springs jurisdiction.
- D. Population forecast scenarios, based on growth rate and migration models, compared with other regional projections.
- E. Employment and income analysis.
- F. Economic activity, including retail sales.

#### 1.2 Housing and Development Snapshot and Trends

- A. Ten-year review of housing production by type, price and geography.
- B. Economics of housing, including values and costs.
- C. Comparison and analysis of changes in housing occupancy.
- D. Analysis of commercial, industrial, and office development.
- E. Mapping of major development areas.

#### 1.3 Land Use Inventory

- A. Inventory and mapping existing land use, including mapping and tabulation of uses within the corporate boundaries of the City and its extra-territorial jurisdiction.
- B. Analysis of existing uses by density/compactness and use distribution.

#### 1.4 Transportation Issues and Changes

- A. Compiling existing traffic volumes on major street system.
- B. Analyzing and applying existing regional traffic models.
- C. Defining the existing system by functional category and street section.
- D. Calculating existing level of service through volume/capacity analysis.
- E. Defining and mapping proposed changes in the local and regional system.

#### 1.5 Public Facility Inventory

- A. Identifying and evaluating each public facility in Excelsior Springs, including public buildings, police and fire facilities, and service bases.
- B. Evaluating each facility's ability to meet future market needs, using field visits and interviews with facility managers.

#### 1.6 Infrastructure Inventory

- A. Basic analysis of existing infrastructure issues, including wastewater management, storm water, water distribution, and solid waste systems.
- B. Evaluating current system operation and constraints, using interviews, evaluations of conditions and future repair and growth needs.
- C. Defining service expectations and standards for each infrastructure system.

## **1.7 Environmental Resources and Constraints**

- A. Identifying and mapping important environmental and geographic features in undeveloped areas.
- B. Identifying and mapping other significant features and National Register listed or eligible sites and properties.

## **1.8 Opportunities and Issues**

- A. Developing an Opportunities Map for review by the Stakeholder Committee
- B. Presenting existing conditions and issues at workshop meetings of the Stakeholder Committee.

## **Part II: Goals and Principles**

As the snapshot document is developed, we will begin the process that will define a shared community vision for Excelsior Springs. This Goals and Principles process will define a set of common principles and directions that reflect community values and guide the rest of the comprehensive plan. We will develop this consensus through the following:

### **2.1 The Excelsior Springs Plan Steering Committee.**

This broad-based group will meet monthly throughout the process. Recommended membership includes key city staff, including the City Manager, planning, parks, and public works directors, and others; City Council and Planning Commission members; and representatives of the business community, neighborhoods, and key interest and affinity groups, including young people and seniors. Regular Steering Committee meetings will ensure timely participation and keep the process on schedule.

### **2.2 Key Stakeholder Discussions.**

A two-day program of stakeholder group discussions, organized by discipline and held at the beginning of the planning process, provide critical insights that guide the planning process. Potential stakeholder groups include key city and county officials, the Chamber of Commerce and economic development corporation, Realtors, homebuilders and developers, retailers, industries, school districts, regional and state officials, and others as recommended by the city and the Steering Committee.

### **2.3 Project Website and Survey.**

We will create a project website as a primary method of providing ongoing public information and gathering community input. This step will include an on-line community survey to elicit and measure opinions and perceptions of the city, to assess the health and condition of key community systems, and to receive public input on issues and priorities.

### **2.4 Initial Community Workshop.**

The process should maintain public involvement and participation every step of the way. An initial public workshop will:

- Present the snapshot analysis and forecasts developed during Part One of the process, and
- Review the results of the stakeholder discussions and community survey.
- Include a working session to engage participants in reviewing and confirming specific goals and community development principles.

### **2.5 Statement of Goals and Development Principles.**

This deliverable publication will summarize the results of this part of the process, marking a critical milestone in the planning program. It includes a review of the goal-setting process and includes a Statement of Principles, defining the organizing patterns that will guide development in Excelsior Springs. This Statement, as well as plan goals and objectives, will be reviewed, modified and ultimately approved by the Steering Committee.

#### **Deliverables:**

- Proceedings and notes of the process

- Adopted Statement of Goals and Development Principles.

## Part III. The City Development Framework

The City Development Framework process uses (1) the detailed land-use survey, demographic and economic projections already developed (in the first stage), and (2) review of earlier land use and demographic information gathered by RDG, to determine historic absorption rates of residential, commercial, industrial, and public land in the city. This information is used to develop a unified Framework Plan for the city and its neighborhoods through a highly participatory process.

### 3.1 Future Land Development Needs.

This step will determine future growth needs for urban residential, commercial, industrial/business park, mixed use, and civic land, developed by analyzing projected growth and the operation of commercial and housing markets. It will also identify major amenities, public facilities, and transportation connections needed to serve growth areas.

### 3.2 City Development Framework.

The City Development Concept provides a design for the community that is then realized through other parts of the Comprehensive Plan. It will identify the framework of arterial and collector streets to ensure that future growth areas are connected to each other and to the existing street system. It will also consider such issues as development yield, open space and greenways, local street patterns, and development design. These specific plans will illustrate how development might occur in these growth areas. The intention of the Development Concept is to guide the actual development of the area by illustrating a desirable outcome.

We will involve both the Steering Committee and the general public in a highly participatory process to prepare and refine the Development Concept to guide the future development of Excelsior Springs. This process includes:

- A. *Steering Committee Development Concepting Workshop.* This hands-on, physical-planning workshop will engage the Steering Committee in the design of the future Excelsior Springs. Using a variety of maps and graphic resources, we guide the committee in developing diagrammatic concepts for the city's future growth and form, and we can define areas of agreement and difference.
- B. *Development Concept Community Design Studios.* These studios are the venue for much of the development concepting and includes a three-day overall concept design studio in the city. This studio relates citywide features such as the locations and types of historic districts, environmental features, commercial and mixed-use centers, residential growth areas, industrial development and physical systems such as transportation, parks and greenways.

### 3.3 Plan Refinement and Presentation.

During this step, we refine the land use concept into a development vision. We present the completed concept at a public open house.

#### Deliverables:

- Development Framework Map

## Part IV: Comprehensive Plan Elements

The plan elements are concepts and policies that will implement the community vision and achieve the preferred development concept. These elements detail the systems that implement the overall concept. In the Excelsior Springs process, the specific plan elements include:

- Land Use (including Environmental Resources and Constraints)
- Transportation, including vehicular transportation, public transportation, bicycle transportation, and pedestrian access. Parks and Recreation, including trails and greenways.
- Infrastructure, including sanitary sewer, storm sewer and drainage, water, and electric
- Community Services, including Public Facilities and Public Safety
- Downtown and Special Districts, including central Excelsior Springs and key corridors.
- Urban Design, including the nature of historic areas and other design elements of the city.
- Community Development, including Housing and Neighborhood Conditions.

## 4.1. Land Use.

The land use plan refines the City Development Framework into a Future Land Use Plan. The plan includes:

- *Identification of geographic growth areas, defining the policies and investments necessary to support desired growth in these areas.* The plan also includes a calculation of the development yield of each of these growth areas.
- *Definition of Land Use Redirection and Policy Areas.* This analysis examines planning and land use issues within the established city as well. Areas of consideration include full use of underutilized parcels, potential redirection or redevelopment of obsolete land uses, neighborhood conservation and stabilization issues, land use conflicts, and areas of special community character and significance.
- *The Future Land Use Plan.* The future land use plan will indicate the citywide plan, along with individual plans for the deployment of residential, commercial, industrial/employment center, and mixed use space. Land use maps illustrating single-use districts offers little flexibility to decision-makers and invites frequent comprehensive-plan changes. To solve this problem, we developed a land use planning system that groups together ranges of uses, based on similar intensity and operating effects. This “spectrum of uses” approach gives users a more realistic guide for development.
- *Decision-Making Framework.* This framework includes policies and decision-making criteria, designed to help Planning Commission and City Council members evaluate specific development proposals. It makes the plan a living tool for evaluation and improvement of development proposals. The framework includes a compatibility guide, creating a system of compensating improvements and performance standards to minimize negative effects when uses of varying intensities locate next to one another.

Throughout this process we will work closely with the city’s GIS/Engineering Coordinator to create high-quality maps that can be seamlessly integrated into the final product.

**Deliverable:** Future Land Use Plan

## 4.2. Transportation.

The RDG/Larkin team will complete a comprehensive review of Excelsior Springs’ transportation system. This includes a review of the existing roadway performance and identification of future roadway needs to accommodate growth and planned improvements underway. Specific performance and transportation review tasks include:

- *Documenting and evaluating the current system.* This process includes collecting available traffic volume data (24-hour and peak hour traffic counts) to assess current roadway demand in the city. This section will also consider accident rates and operational issues at specific locations.
- *Capacity analysis.* This task includes a current roadway capacity analysis along the major corridors and at major intersections within the city’s jurisdiction. The ability to evaluate the capacity and performance of roadways within anticipated growth areas will use available MoDOT data and forecasts.
- *Defining the Transportation Network.* The Transportation Network Plan will include:
  - Programming necessary improvements to the existing street system to accommodate present and future traffic loads.
  - Designing a street system consistent with the City Development Framework and providing continuous access to future residential and commercial development areas.
  - Establishing standards and concepts for the design of high-quality streets, conceiving of them as public spaces that must unite rather than divide parts of the city.
  - Developing a pedestrian and bicycle plan, considering the location of community destinations and the suitability of streets and other public ways for non-motorized use. The pedestrian/bicycle plan will consider grades and ease of access, very important issues in a hilly environment like Excelsior Springs and will match street sections to appropriate facilities.

**Deliverable:** Transportation Element

### 4.3. Parks and Trails Master Plan.

The *parks, open space, and recreation plan* is a fundamental element of the Excelsior Springs plan. The city's future ability to sustain its strong park system and keep up with facility demand will be vital to its continued attractiveness. New neighborhood park needs in developing areas will also be considered.

This element is designed to plan for present and future park and open-space needs, and to integrate park-system planning into the city's overall development concept. Components of the process include:

1. An inventory and analysis of each park and recreation facility in the Excelsior Springs park system.
2. Inventory and evaluation of recreational programs, using information from city staff, service standards, individual interviews, and focus groups of recreational users. School district facilities and programs are included in this assessment.
3. Comparison of existing park and recreational facilities with service standards (for example, are parks and facilities adequate to the city's population and geographic distribution?). We use the concept of "service communities" to help determine park needs. Service communities are areas that have relatively safe, easy access to specific facilities, free of dividing barriers.
4. Use of population and growth forecasts to predict future parks and recreation needs.
5. Analysis of park development needs and opportunities, in relation to the city development concept, land use and population projections, environmental resources, and regional open space issues.
6. Development of a parks and recreation plan, including:
  - a. Locations (and possible alternative sites) of parks and greenways. Park facility location is related to the city development concept.
  - b. Facility programs for proposed parks in new and existing areas.
  - c. Facility rehabilitation and upgrade program for existing park facilities.
  - d. Recommendations for park facility funding.
  - e. Recommendations for recreational program enhancement.
  - f. Trail and pedestrian system, coordinated with the transportation plan. This plan identified priorities for new trail construction and will be updated with current information.

### 4.4. Infrastructure.

The RDG/Larkin team will evaluate and make general recommendations for current infrastructure. The scope of this section includes:

- *Sanitary Sewer and Wastewater Management System Plan.* This section will provide a general evaluation of these systems and their adequacy for projected growth; and provide recommendations based on the city development framework and land use plan, including mapping of key recommendations.
- *Stormwater Management Plan.* Working with city staff, we will identify difficulties and recommend system improvements and strategies based on the city development framework and land use plan. The section will also address regulatory issues, such as stormwater detention policies, and will present Best Management Practices (BMPs) for dealing with stormwater runoff.
- *Water Distribution.* The team will provide a general assessment of the condition of the water distribution system, and determine its adequacy for future growth. The report will provide general recommendations to correct problems and provide service into growing areas.

### 4.5. Public Facilities.

The public services element will address vital support services, including:

- Public facilities and buildings.
- Public safety services. This review considers Police, Fire and EMS in view of existing and projected response times, personnel needs and future growth needs.
- Operational bases, such as public works maintenance facilities.

- Service relationships with school systems.

In our process, the analysis includes an analysis and assessment of each public property, interviewing designated city operating staff to define:

- Facility adequacy.
- Ability to provide service into the future.
- Necessary rehabilitation, expansion, or modifications.

Recommendations will take into account the need for relocation, new facilities, and the potential to reuse existing facilities or properties. Removing a facility can leave a gap in a neighborhood that must be filled with a productive replacement use.

The completed Public Facilities element includes a capital improvement program for infrastructure, and public facilities improvements. This element is integrated into the City Development Framework, to ensure that public-services work in conjunction with community development goals and acts as a durable policy guide for the future.

#### 4.6 Downtown and Special Districts

This section will take a close and strategic look at central Excelsior Springs (including the Downtown and Elms districts) and other important corridors. Downtown is enormously important to the city, and strategies should enhance previous policies and actions. This step will include:

- An inventory of existing building and land use, historic importance, and parking and circulation, and assessment of current needs.
- A two-day downtown development studio, involving downtown stakeholders in the conceptual planning of the district.
- A downtown strategy plan, considering changes in the physical, organizational, and development environment to expand business investment. This may lead to a more comprehensive downtown development program.
- Investigation of the concept of a historical park, linking Downtown with surrounding features into a visitor network that encompasses the larger city.

This task will also investigate key commercial corridors. These corridors, such as North Jesse James and the 69 Highway corridors are important economic engines for the city. This section will examine the design, streetscape, and development environment of these key corridors, and generate concepts for their enhancement.

#### 4.7 Urban Design

The Urban Design element is closely related to the special districts task. It will consider such supporting issues as:

- *The Green Environment*, including the relationship of the city's major open spaces, including watercourses, to each other and the surrounding neighborhoods.
- *The Transportation Environment*. This addresses the experience of traveling through and around the city. This element considers gateways, wayfinding, street design, street landscaping, and similar features.
- *Neighborhood Character*: Addressing the character and design of Excelsior Springs' residential districts, defining major historic and architectural resources, and developing policies and concepts that strengthen established areas.
- *Directions for Design Guidelines*: Considerations with respect to buildings in the public and private environment, investigating such issues as landscaping and building design principles. These may ultimately be incorporated into the city's land development regulations.

#### 4.8. Community Development.

This component considers housing and neighborhood issues in Excelsior Springs and establishes an implementation-based housing and neighborhood conservation policy. This process will include:

- *Review of recent and current housing activity*, utilizing and expanding information gathered during the previous planning processes. Of particular significance is the distribution of housing prices and permit values in new development

- *Neighborhood Conditions.* This includes a general review of housing and neighborhood conditions, possibly using a neighborhood-based approach. The condition assessment will examine such issues as overall housing types and condition, site maintenance issues, streets, infrastructure, and physical design and appearance.
- *Housing Needs by Cost Structure.* This will establish overall city housing objectives and needs by cost distribution, again expanding on the information developed during the previous plan process.
- *Housing and Neighborhood Implementation Program.* This program addresses such issues as available development sites, recommended housing mix, infrastructure needs and financing, and neighborhood strategy and rehabilitation needs. This will provide a basis for the implementation of a new city community development program.

## **Part V. Implementing and Financing the Plan**

This section addresses issues necessary to achieving the plan. It includes the annexation section, a review of the city's development ordinances, as they relate to elements proposed by the comprehensive plan, and capital improvement programming and financing issues.

### **5.1. Growth Staging and Future Annexation Plan.**

The Excelsior Springs Plan will include recommendations for growth staging. The Growth Staging program will be based on the conclusions of other plan components and tied to the infrastructure and city services analysis of the plan to ensure cost-efficient expansion of those facilities.

### **5.2. Land Development Ordinance Review.**

During this step, we will review the city's current ordinances for consistency with the plan, and recommend general changes necessary to further the plan's overall goals.

### **5.3. Capital Improvements Plan and Financing Program.**

The *capital improvement program* is a key implementation tool. We will relate development directions of the land-use plan to impact on infrastructure; and make recommendations regarding a phased, long-range capital improvement process that provides for the orderly extension and improvement of water, sewer, and storm-water facilities.

## **Part VI. Public Open House and Presentation**

The public presentation process culminates the planning program and is designed to build understanding and enthusiasm for the plan and its vision and directions. The process includes:

### **5.1. A Public Open House**

The open house takes place at completion of a preliminary draft of the plan and provides a half- to full-day period and workshop at which we invite the general public to view the plan and its primary recommendations and to discuss and comment on them. This allows us to make changes and adjust concepts up to the last moment, and to ensure a broad level of community understanding and support for the document. The findings of the open house are discussed with the Steering Committee. The open house typically involves two identical public presentations, so people can participate on their schedule.

### **5.2. Planning Commission/City Council Workshop**

We plan a half-day joint workshop with these approving agencies to review key plan concepts and recommendations before the formal approval process.

### **5.3. Public Hearings**

This step includes presentations at formal public hearing of the Planning Commission and City Council.

## Meeting Schedule

The following is the proposed meeting schedule for the project. While the agendas of individual meetings are subject to revision during the course of the project, the total number of proposed meetings is firmly established as indicated and additional meetings are considered additional scope. This schedule includes the Focus Group/Key Person Interviews and the Community Workshops included in Part II Goals and Principles. It also includes the City Development and Central Excelsior Springs studio visits described above.

Committee Meeting 1: Community Kick-off/ Steering Committee Strategic Planning Meeting

Committee Meeting 2: Steering Committee Strategic Planning Meeting 2: Snapshot Presentation

Committee Meeting 3: Stakeholder Group Meetings

- Stakeholder Group Discussions
- Community Workshop
- Steering Committee Outbriefing

Committee Meeting 4: Steering Committee Goals and Principles Meeting

Committee Meeting 5: Public Presentation of Existing Conditions and Goals and Principles Document

Committee Meeting 6: City Development Framework Studio

- Development Planning Studios (2-3 days)
- Steering Committee Outbriefing

Committee Meeting 7: Plan Elements

Committee Meeting 8: Central Excelsior Design Studio Framework

- Design Studio (2 days)
- Steering Committee Outbriefing

Committee Meeting 9: Plan Elements (additional meetings possible by WebEx)

Committee Meeting 10: Plan Implementation

Committee Meeting 11: Steering Committee Presentation and Public Open House

Committee Meeting 12 and 13: Formal Presentations