

# Scope of Work

This proposed scope of work is designed to result in a comprehensive rewrite of McKinney’s Development Code. The preliminary budget and timeline in the following sections track this proposed scope of work. All elements of the scope, budget, and timeline are preliminary and subject to discussion and negotiation.

## TASK 1. PROJECT ORIENTATION AND MANAGEMENT

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This task serves as a kick-off for the entire project, and allows for the development of project management and public participation frameworks that will support all subsequent tasks.

### 1.1. BACKGROUND RESEARCH

As a first step, the team will review in greater detail the McKinney Comprehensive Plan, the current Development Code and zoning map, and any other relevant plans and policies as identified by City staff. This background review will form the basis for the initial meetings described below.

### 1.2. PROJECT ORIENTATION MEETING AND TOUR

**Project orientation meetings.** On a kick-off trip, the team will hold a project orientation meeting with City staff to discuss overall project goals, the project work plan, and schedule. Following the meeting, we will prepare a detailed drafting schedule that identifies product delivery dates as well as internal review and comment periods. We have found these schedules to be critical to maintaining project momentum. Our success in completing projects on time and on budget is due in part to regular communication with our clients throughout the project and our ability to make adjustments when necessary. Also on the kick-off trip, the team will discuss the public engagement process to inform the public participation plan, described below. Get-acquainted meetings will be held with the elected and appointed officials as recommended by City staff.

**Site tour.** We will tour McKinney with City staff so the team can gain an understanding of how key substantive issues are playing out in practice—for example, looking at recent development projects.

**Short-term priority amendments.** Clarion will discuss with staff particular code issues that should be addressed prior to delving into the other drafting phases of the project. More detail on these updates are provided later in this scope of work.

### 1.3. INITIAL COMMITTEE MEETINGS

On the kick-off trip, the team will work with the City’s project manager to arrange an initial meeting and kick-off with the Advisory Committees. For discussion purposes, this draft scope is based on the formation of two Advisory Committees:

- A **Technical Advisory Committee** will be made up of a multi-departmental staff. This group would review all staff-level drafts of work products and help ensure consistent feedback from McKinney City departments. This Advisory Committee can largely be organized by project staff, and will not required as much administrative support and outreach as will be necessary for the Citizen Advisory Committee.
- A **Citizen Advisory Committee** will be made up of external stakeholders (including perhaps some elected or appointed officials). This committee would review public drafts of the various work products throughout the entire project and would serve as both advisors to the consulting team and also unofficial ambassadors for the project to the McKinney community. The group would ideally consist of roughly 10 to 12 members. The recently assembled McKinney Development Committee (MDC) could serve in this capacity.

Regular meetings with these groups will help ensure that each phase of the drafting is supported by broad-based, meaningful stakeholder feedback. Clarion will facilitate meetings with these Advisory Committees throughout the project on scheduled trips; however, staff may host additional meetings with the committees between Clarion trips. During the



initial meetings, Clarion will provide an introduction to the project scope and timeline, and facilitate discussions with the committee members to learn about their overall goals for this project and to obtain feedback on McKinney land use issues.

For all committee and public meetings described in this scope, Clarion will create informative and graphically rich materials and presentations that are tailored to the specific issues and topics to be discussed and presented, and to the intended audiences. These will be prepared in a variety of formats, such as PowerPoint presentations and detailed information sheets. Additional information on specific public meetings is described in later tasks.

#### **1.4. STAKEHOLDER INTERVIEWS**

Also on the kick-off trip, the team will begin the public participation process by facilitating detailed discussions of land development issues with a variety of McKinney stakeholders. These discussions will be held one-on-one or in small groups with individuals who are familiar in some way with the existing code or land use issues generally in McKinney, such as neighborhood advocates, developers, business owners, consultants, and attorneys. Additionally, we will develop a survey (both printed and online) to be circulated among stakeholders, including staff in other City departments. This survey will help produce a thorough analysis and record of the existing code's strengths and weaknesses and will help inform proposed changes. If recommended by the City, we also will facilitate a general public meeting on the same trip to introduce the project to the general public.

#### **1.5. PUBLIC PARTICIPATION PLAN**

At the beginning of the project, we will finalize and discuss a detailed public involvement strategy plan with City staff. The plan will take full advantage of the various forums available to the City that we have found helpful in other code projects. In particular, the plan will emphasize public involvement, regular reports to elected and appointed officials, and public meetings at important milestones during the process.

Other issues the draft public participation plan will address will include, but not be limited to:

- The role of the Advisory Committees in helping to educate and inform the public. The formation of two Advisory Committees (discussed above) is a key element of our public outreach strategy. Often, committee members can serve as liaisons to keep various groups informed of project progress and to seek detailed input on targeted issues.
- Potential educational opportunities, such as "Zoning 101" presentations to help inform the public about the need for an updated ordinance. These meetings can be led by staff with support from Clarion.
- How technology will be used to keep stakeholders informed about project progress. The key technological tool will be a project website, which this draft scope proposes to be developed and maintained by Clarion. We also have experience using social media tools (e.g., Twitter, Instagram, Facebook) to supplement the website. These types of tools can sometimes be effective in reaching new audiences, such as younger citizens who rarely attend zoning meetings.
- The overall schedule/timeline for public involvement activities throughout the duration of the project.

A first draft of the plan will be developed following the project orientation meeting; following staff comments, we will prepare a revised version for implementation throughout the duration of the project.

#### **1.6. PROJECT WEBSITE**

Clarion will develop and host a website for the project to provide an online central location for uploading key background resources and project materials. Clarion will update the site as necessary (e.g., to provide notice of public meetings and to upload PDF versions of project documents). Clarion will register a domain name (chosen in consultation with City staff), and will host the site for a maximum of 24 months. During that time, any updates, additional content, or other changes or maintenance to the site would be completed by Clarion. The site will provide an opportunity for public comments to be submitted; these will be provided to City staff for incorporation into other public comments received.

#### **1.7. ONGOING COMMUNICATION**

Throughout the duration of the project, Clarion will be available to participate in regular conference calls or video meetings, as needed, to assist in providing relevant project reviews and updates. With a development code update, there can be both

periods of daily communication and also periods where Clarion is in the background drafting materials. During those times, we like to communicate regularly with our clients to make sure they understand exactly where the project stands in relation to the schedule. We are also well-versed in GoTo Meeting and similar online tools for meetings that require review of documents or presentation materials using a shared screen and/or video teleconferencing platform.

In addition, Clarion will facilitate Advisory Committee and public meetings at key milestones throughout the project during scheduled trips, as described in the task descriptions below. The focus and format of the meetings may range (e.g., small workshops, open houses, round tables, public hearings) depending on the project timing, the information being presented for review and discussion, or the intended audience. The general intention of all meetings will be to solicit meaningful feedback from a variety of City stakeholders. City staff may also lead several smaller workshops throughout the project in between the milestone meetings involving Clarion.

The draft budget assigns a reserved amount of time for ongoing project management calls and discussions. The draft budget for ongoing meeting facilitation is included in each of the respective work tasks below.

<b>Summary of Task 1:</b>	
<b>Consultant Team Responsibilities</b>	<b>City Staff Responsibilities</b>
<b>Deliverables</b>	
<ul style="list-style-type: none"> <li>• Maintain project budget and schedule</li> <li>• Prepare public participation plan in MS Word and PDF</li> </ul>	<ul style="list-style-type: none"> <li>• Review project schedules and provide feedback</li> <li>• Review public participation plan and provide feedback</li> </ul>
<ul style="list-style-type: none"> <li>• Prepare meeting materials for Advisory Committee and public meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Review content and provide feedback for all meeting materials</li> <li>• Facilitate additional meetings with public and Advisory Committees as necessary</li> <li>• Distribute background information prior to meetings</li> <li>• Schedule meetings with appropriate stakeholders</li> <li>• Organize meetings (meeting locations, invitations, etc.)</li> </ul>
<ul style="list-style-type: none"> <li>• Facilitate regular communication with City staff</li> <li>• Develop project website for uploading key background resources and project materials; update as necessary; host site for up to 24 months</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in regular meetings with consultant</li> <li>• Integrate public comments submitted to the website for consolidation with other public and staff comments</li> </ul>
<b>Projected Meetings</b>	
<ul style="list-style-type: none"> <li>• Facilitate initial Advisory Committee meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Establish advisory committees</li> <li>• Organize meetings (meeting locations, invitations, etc.)</li> <li>• Attend and participate in meetings</li> </ul>
<ul style="list-style-type: none"> <li>• Facilitate initial meetings with stakeholders and officials</li> </ul>	<ul style="list-style-type: none"> <li>• Identify stakeholders</li> <li>• Organize interviews (meeting locations, invitations, etc.)</li> <li>• Schedule meetings or work session to introduce consultants to elected and appointed officials</li> </ul>
<ul style="list-style-type: none"> <li>• Participate in tour of McKinney</li> </ul>	<ul style="list-style-type: none"> <li>• Organize tour of McKinney and distribute tour maps/materials in advance (if applicable)</li> </ul>
<b>Schedule</b>	
<ul style="list-style-type: none"> <li>• Within two months of project initiation</li> </ul>	

## **TASK 2. SHORT-TERM PRIORITY AMENDMENTS**

Following the kick-off trip, Clarion will immediately begin working on targeted amendments. These short-term priority amendments will include known issues that can be addressed relatively easily without disrupting other elements of the development code, and without disrupting the overall project schedule. Examples may include screening parking ratios, screening requirements, revisions to tree preservation requirements, etc.

Clarion will first prepare a brief memorandum (3-5 pages) documenting our understanding of the issues that need to be resolved through the priority amendments, and charting a path and a basic outline to complete the task. Clarion will prepare a staff draft of the amendments for initial internal review by a core staff team. Staff will provide one round of

consolidated comments to Clarion on that staff draft, and Clarion will then prepare a public draft addressing those comments. We budgeted for a few graphics (4 or 5) to be included in these short-term priority amendments.

Staff will take the lead in carrying these short term priority amendments through the adoption process while Clarion continues working on additional tasks in this scope of work.

<b>Summary of Task 2:</b>	
<b>Consultant Team Responsibilities</b>	<b>City Staff Responsibilities</b>
<b>Deliverables</b>	
<ul style="list-style-type: none"><li>• Prepare staff draft of the short-term priority amendments</li><li>• Prepare the public draft the short-term priority amendments</li></ul>	<ul style="list-style-type: none"><li>• Review draft and provide one round of consolidated written comments</li><li>• Distribute public draft</li><li>• Carry short-term priority amendments through the adoption process</li></ul>
<b>Projected Meetings</b>	
<ul style="list-style-type: none"><li>• Meet with staff to discuss short-term priority amendments during kickoff trip and subsequent phone conversations</li></ul>	<ul style="list-style-type: none"><li>• Organize and participate in meeting and prepare initial list of potential candidates for short-term priority amendments</li></ul>
<b>Schedule</b>	
<ul style="list-style-type: none"><li>• TBD</li></ul>	

## **TASK 3. CODE ASSESSMENT**

Based on our professional experience, and building on information gathered during Task 1, Clarion will prepare a detailed assessment of the current McKinney Development Code. Generally, this assessment will address:

- The Code’s effectiveness in implementing, and consistency with, the McKinney Comprehensive Plan;
- Overall organization and user-friendliness of the Code document;
- Strengths and weaknesses of the existing Code related to specific topics;
- Sections within the Code that should be carried forward relatively intact; and
- National best practices relevant to the City of McKinney.

Along with the code assessment, Clarion will prepare a detailed annotated outline for a revised development code. The annotated outline will provide detailed recommendations for an improved organizational structure, and describe how the new code will be integrated with other McKinney regulations and ordinances. The annotated outline will include a description of options to consider, and commentary explaining the rationale for any recommended approaches.

### **3.1. STAFF DRAFT**

The first draft of the code assessment and annotated outline will be for internal staff review only (and the Technical Advisory Committee if one is formed). That review allows staff time to provide Clarion with substantive feedback and identify any factual errors or major issues that should be clarified or adjusted in the document prior to public review.

### **3.2. PUBLIC DRAFT AND PRESENTATION**

After the team revises the staff draft, based on one round of consolidated written comments from staff, a public draft will be released. We will convene a meeting with the Citizen Advisory Committee and one public meeting to discuss the report and receive comments. The general objective of these meetings will be to gain consensus on the general scope and parameters of the issues to be addressed in the drafting of the revised code. In our experience, obtaining early consensus on issues contained in the report is a crucial step toward ensuring that the remainder of the process proceeds smoothly and effectively.

Summary of Task 3:	
Consultant Team Responsibilities	City Staff Responsibilities
<b>Deliverables</b>	
<ul style="list-style-type: none"> <li>• Prepare staff draft of the Code Assessment</li> <li>• Prepare the public draft of Code Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Review draft and provide one round of consolidated written comments</li> <li>• Distribute public draft</li> </ul>
<b>Projected Meetings</b>	
<ul style="list-style-type: none"> <li>• Present public draft of Code Assessment (Citizen Advisory Committee; public meeting on same trip)</li> </ul>	<ul style="list-style-type: none"> <li>• Organize meetings with the Citizen Advisory Committee and public and distribute background materials prior to the meetings</li> </ul>
<b>Schedule</b>	
<ul style="list-style-type: none"> <li>• Deliver staff draft within 10 weeks of project orientation meetings</li> </ul>	

## TASK 4. PREPARE DRAFT DEVELOPMENT CODE

### 4.1. DRAFT DEVELOPMENT CODE – STAFF DRAFTS

Building upon the work completed in the Assessment Report, Clarion will begin drafting the revised Development Code. Drafts will be user-friendly and include all the substantive new materials discussed in the report. The drafts will emphasize the use of graphics, tables, and charts to clearly explain zoning and land use concepts. The drafts will include commentary and footnotes to explain changes from current regulations and practice, the rationale behind each new provision, and how the revised code addresses issues noted in the Code Assessment.

We recommend dividing the drafting of the new Development Code into thematically related installments to help each review body—staff, stakeholders, community members—read and digest the new information in logical increments. While the specific order and contents of each installment is up for discussion, below we suggest a typical breakdown that has worked well in other communities. Each installment would be completed with presentations at public meetings and a presentation to the Citizen Advisory Committee.

For each installment, a “staff draft” will be created and circulated for review by key staff to check the factual accuracy (e.g., to ensure any procedures to be carried forward are described correctly) and clarity and feasibility of recommended changes. Each of these drafts will also be reviewed by the Technical Advisory Committee, if one is formed. Each staff draft will be accompanied by a cover memorandum that summarizes the major new features of the draft, significant changes from current provisions, and explanations of the new material. While staff is reviewing the first installment, Clarion will begin drafting the second, and so on. Following this schedule, drafting and staff review proceeds in an efficient manner that maintains project momentum.

#### 4.1.A. INSTALLMENT 1 – ADMINISTRATION AND PROCEDURES

This component will include all the review and approval procedures in McKinney related to land use and development. Existing procedures will be reviewed and updated and/or completely rewritten with general goals of promoting efficient, effective, and predictable decision-making. The existing review procedures summary table will be updated accordingly. This installment also will cover general provisions, enforcement procedures, and rules for nonconformities. Also, we recommend including applicable definitions in each phase, building up to a final consolidated list of definitions.

#### 4.1.B. INSTALLMENT 2 – ZONING DISTRICTS AND USES

This component will include drafts of the proposed districts (new or existing districts, plus dimensional standards) and uses allowed by right or by special review in each district. This material is the backbone of most Development Codes and it is important that zoning districts are drafted simultaneously to ensure they use a consistent vocabulary, and that the proposed districts are not overlapping or repetitive. The districts will include both text and illustrations for each district that address applicable use, scale, siting, and (potentially) building form. One important component of this work is to modernize and simplify permitted use lists and controls to allow flexibility for market-driven adjustments, to address more modern and emerging land uses, and to remove antiquated uses. This will also focus on better aligning the zoning districts with the McKinney Comprehensive Plan.

#### 4.1.C. INSTALLMENT 3 – DEVELOPMENT AND DESIGN STANDARDS

This component will include standards that address the look and feel of new development and redevelopment (e.g., landscaping, parking, connectivity, building design, and lighting). The development standards are also expected to address environmental and open space protection, sustainability (e.g., renewable energy infrastructure), and redevelopment and infill standards. Sign regulations is also proposed to be included in this last installment.

#### 4.2. DRAFT DEVELOPMENT CODE - PUBLIC DRAFTS AND PRESENTATIONS

Based on one round of consolidated written feedback on the staff draft of each installment, Clarion will produce a revised, refined public draft of each installment for distribution to the Advisory Committee(s), key stakeholders, and the public.

With each public draft installment, Clarion will post the draft materials on the project website and also will schedule a trip to present the installment to the public. We recommend three meetings per installment – one for the Technical Advisory Committee, one for the Citizen Advisory Committee and one public meeting, all scheduled to occur on the same trip. (All trips in this scope are budgeted at two days, one night.) Clarion will facilitate the meetings and prepare materials and presentations for these meetings, seeking staff review and input before finalizing them. We anticipate staff will attend and provide brief introductions and participate in the majority of the meetings.

#### 4.3. CONSOLIDATED DRAFT DEVELOPMENT CODE

Based on comments received from staff, the Advisory Committee(s), other stakeholders, and the general public, we will revise the public draft installments to create a Consolidated Draft Development Code document. Clarion representatives will lead the development of all meeting materials and will present the materials during one trip to the Advisory Committees, the Planning Commission, the City Council, and any other meetings scheduled during that trip.

#### 4.4. ADOPTION DRAFT DEVELOPMENT CODE

After receiving comments on the Consolidated Draft Development Code, Clarion will revise the document and create an Adoption Draft Development Code document that staff will carry forward into the adoption process. This draft will include final versions of all illustrations, charts, and tables.

Summary of Task 4:	
Consultant Team Responsibilities	City Staff Responsibilities
<b>Deliverables</b>	
<ul style="list-style-type: none"> <li>Prepare Staff Drafts of Code sections (in three installments) in MS Word and PDF</li> </ul>	<ul style="list-style-type: none"> <li>Review drafts and provide one round of consolidated written comments on each installment</li> </ul>
<ul style="list-style-type: none"> <li>Prepare Public Drafts of Code sections (in three installments) in MS Word and PDF</li> </ul>	<ul style="list-style-type: none"> <li>Review public drafts and note any further comments</li> <li>Consolidate written comments from stakeholders and public on each installment</li> </ul>
<ul style="list-style-type: none"> <li>Prepare Consolidated Draft Development Code (one consolidated draft) in MS Word and PDF</li> </ul>	<ul style="list-style-type: none"> <li>Review consolidated draft and note any further comments</li> </ul>
<ul style="list-style-type: none"> <li>Prepare Adoption Draft Development Code in MS Word and PDF</li> </ul>	<ul style="list-style-type: none"> <li>Distribute draft to City officials and the public</li> <li>Consolidate written comments</li> </ul>
<b>Project Meetings</b>	
<ul style="list-style-type: none"> <li>Public Draft Development Code: Present public drafts of three installments to Citizen Advisory Committee and one public meeting to solicit feedback (three Clarion trips)</li> </ul>	<ul style="list-style-type: none"> <li>Organize meetings and distribute background materials prior to the meetings</li> <li>Consolidate comments from stakeholders and public on each installment</li> </ul>
<ul style="list-style-type: none"> <li>Consolidated Draft Development Code: Present consolidated public draft to Advisory Committees, public officials, and other stakeholder groups (one Clarion trip)</li> </ul>	<ul style="list-style-type: none"> <li>Organize meetings and distribute background materials prior to the meetings</li> <li>Consolidate comments from stakeholders and public</li> </ul>
<b>Schedule</b>	
<ul style="list-style-type: none"> <li>Deliver and hold public meetings on Consolidated Draft within 20 months of project initiation (to allow three months for final adoption)</li> </ul>	

## TASK 5. ADOPTION

Clarion will provide support during the adoption process as detailed below. Although staff will carry the adoption draft Development Code through the adoption meetings and hearings, Clarion will be available to attend any of the adoption meetings by revising the scope of work and budget on a time-and-expenses basis.

### 5.1. EXECUTIVE SUMMARY

Clarion will provide both Planning Commissions and the City Council with the Final Draft Development Code in a form appropriate for their review and consideration for final adoption. To accompany the Final Draft, Clarion will prepare a brief Executive Summary that describes the project and the final documents, detailing comparisons between the existing and proposed regulations, and summarizing the major changes.

### 5.2. FINAL DEVELOPMENT CODE AND ONLINE PRESENTATION

Based on comments and direction received during the adoption process, as summarized in consolidated written direction provided by staff, Clarion will create the final adopted draft of the new Development Code for the City's files. This final draft will be prepared to live on McKinney's website in a user-friendly and searchable PDF format.

### 5.3. SUMMARY POWERPOINT AND STAFF TRAINING

Following the final adopted draft of the new code, Clarion will prepare a PowerPoint presentation that walks through the changes from the old regulations to the new Development Code and highlights some of the new features. If necessary, Clarion will walk through the presentation with staff using *GoToMeeting* or a similar platform. Clarion will be available to facilitate additional in-person training for staff and/or other stakeholders upon request on a time-and-expenses basis.

Summary of Task 5:	
Consultant Team Responsibilities	City Staff Responsibilities
<b>Deliverables</b>	
<ul style="list-style-type: none"> <li>Submit final drafts in MS Word and PDF</li> <li>Prepare executive summary to accompany final drafts in MS Word and PDF</li> <li>Make edits to Adoption Draft based on consolidated written comments from staff</li> </ul>	<ul style="list-style-type: none"> <li>Staff leads the adoption process and facilitates all meetings and hearings</li> <li>Organize meetings and distribute background materials prior to the meetings</li> <li>Consolidate comments from stakeholders and public on the Adoption Draft</li> <li>Work with consultant team to develop and refine the list of code-related queries for which calculators will be developed</li> </ul>
<b>Project Meetings</b>	
	<ul style="list-style-type: none"> <li>Staff leads the adoption process and facilitates all meetings and hearings</li> <li>Organize meetings and distribute background materials prior to the meetings</li> <li>Consolidate comments from stakeholders and public on each draft</li> </ul>
<b>Schedule</b>	
<ul style="list-style-type: none"> <li>Hearings TBD</li> </ul>	

## PRELIMINARY SCHEDULE

Based on our experience, we believe a 24-month engagement period resulting in adoption is aggressive but realistic for the proposed scope of work (though the actual adoption date depends on political factors and thus can be somewhat unpredictable). The schedule assumes project initiation in late May or June 2019, assuming a contract is signed by that date.

We outlined a process in this proposal that we believe works and will result in a draft code that has been through numerous public meetings within 20 or 21 months, which then would be followed by two or three months for the final adoption



(which often we find can be a formality if prior meetings have been well-attended, informative, and productive). We are happy to discuss alternatives with you at the discretion of staff and/or the evaluation committee. A more detailed schedule is provided below.

McKinney, TX – Development Code Updates	2019								2020												2021		
	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M
Task 1 – Project Orientation																							
1.1 Background research																							
1.2 Project orientation meeting and tour																							
1.3 Initial committee meetings																							
1.4 Stakeholder interviews																							
1.5 Public participation plan																							
1.6 Project website																							
1.7 Ongoing communication																							
Task 2 – Short-Term Priority Amendments																							
2.1 Staff draft																							
2.2 Public draft																							
Task 3 – Code Assessment																							
3.1 Staff draft																							
3.2 Public draft																							
Task 4 – Prepare Draft Development Code																							
4.1 Draft Development Code – staff drafts																							
4.2 Draft Development Code – public drafts																							
4.3 Consolidated draft Development Code																							
4.4 Adoption draft Development Code																							
Task 5 – Adoption																							
5.1 Executive summary																							
Staff-led adoption meetings																							
5.2 Final Development Code and online presentation																							
5.3 Summary PowerPoint and staff training																							

## PRELIMINARY BUDGET

A preliminary project budget, broken down by tasks, is summarized on the following page. It includes all professional fees, travel, and other reimbursable expenses. This cost estimate is based on the team's extensive experience with similar code rewrite projects. All numbers are preliminary and open to discussion and negotiation. We are flexible and committed to developing a work plan, division of labor, and budget consistent with the City's resources and objectives.

Clarion Associates has an enviable record of completing projects within budgeted amounts. We maintain that record by developing a budget allocation, by task, with our client, at the start of the project. We prefer the flexibility to reallocate a budget between tasks with the consent of the client, but our task-based approach allows us to carefully track our level of effort at each phase in order to spot potential overruns well in advance. In almost all cases, we are able to make mid-course adjustments to the workflow in order to complete the entire project within budget. Clarion prefers to bill monthly, based on the percentage of work completed the prior month, but we are happy to discuss alternatives.



McKinney, Texas - Development Code Rewrite							
	Clarion Associates				Atty (Dougherty)	TOTAL	% of Total Budget
	Wafaie	Goebel	Associate	Graphics			
Hourly Rate	\$140	\$215	\$85	\$80	\$200		
<b>Task 1. Project Orientation and Management</b>							
1.1 Background Research	8	8	12			\$5,240	18.03%
1.2 -1.4 Project Orientation Trip	32	32	32		32	\$24,160	
1.5 Public Participation Plan	4	4	4			\$2,220	
1.6 Project Website	12	4	20	20		\$6,540	
1.7 Ongoing Communication	40	32	24		8	\$18,880	
<b>Hours</b>	<b>96</b>	<b>80</b>	<b>92</b>	<b>20</b>	<b>40</b>	<b>328</b>	
Labor Costs	\$13,440	\$17,200	\$7,820	\$1,600	\$8,000	\$48,060	
Number of Trips	1	1	1	0	1		
Trip Costs	\$1,200	\$1,000	\$1,000	\$0	\$1,000	\$4,200	
<b>Task Total</b>						<b>\$52,260</b>	
<b>Task 2. Short-Term Priority Code Amendments</b>							
2.1 Staff Draft	40	20	60	12	8	\$23,500	9.29%
2.2 Public Draft	20	8	40	8	4	\$13,320	
<b>Hours</b>	<b>60</b>	<b>28</b>	<b>100</b>	<b>20</b>	<b>12</b>	<b>220</b>	
Labor Costs	\$8,400	\$6,020	\$8,500	\$1,600	\$2,400	\$26,920	
Number of Trips							
Trip Costs						\$0	
<b>Task Total</b>						<b>\$26,920</b>	
<b>Task 3. Code Assessment Report</b>							
3.1 Staff Draft	32	12	60	20	8	\$20,660	12.00%
3.2 Public Draft and Presentation	40	32	40	4		\$20,480	
<b>Hours</b>	<b>72</b>	<b>44</b>	<b>100</b>	<b>24</b>	<b>8</b>	<b>248</b>	
Labor Costs	\$10,080	\$9,460	\$8,500	\$1,920	\$1,600	\$31,560	
Number of Trips	1	1	1	0	0		
Trip Costs	\$1,200	\$1,000	\$1,000			\$3,200	
<b>Task Total</b>						<b>\$34,760</b>	
<b>Task 4. Prepare Draft Development Code</b>							
4.1 Draft Development Code - Staff Drafts							57.43%
Installment 1 - Administration and procedures	36	20	80	10	16	\$28,540	
Installment 2 - Zoning districts and uses	36	20	80	60	8	\$26,940	
Installment 3 - Development/design standards	36	24	90	60	12	\$30,600	
4.2 Draft Development Code - Public Drafts and Presentations							
Installment 1 - Administration and procedures	60	8	72		12		
Installment 2 - Zoning districts and uses	60	8	72	8	4		
Installment 3 - Development/design standards	60	8	72	8	8		
4.3 Consolidated Draft Development Code	60	24	72	32	20		
4.4 Adoption Draft Development Code	16	4	20	8	12	\$9,500	
<b>Hours</b>	<b>364</b>	<b>116</b>	<b>558</b>	<b>186</b>	<b>92</b>	<b>1,316</b>	
Labor Costs	\$50,960	\$24,940	\$47,430	\$14,880	\$18,400	\$156,610	
Number of Trips	4	1	4				
Trip Costs	\$4,800	\$1,000	\$4,000	\$0	\$0	\$9,800	
<b>Task Total</b>						<b>\$166,410</b>	
<b>Task 5. Adoption</b>							
5.1 Executive Summary	2	2	8	2	1	\$2,510	3.25%
5.2 Final Development Code and Online Presentation	12	4	20		1	\$6,740	
5.3 Summary PowerPoint and Staff Training	8	2	16	4		\$4,750	
<b>Hours</b>	<b>22</b>	<b>8</b>	<b>44</b>	<b>6</b>	<b>2</b>	<b>82</b>	
Labor Costs	\$3,080	\$1,720	\$3,740	\$480	\$400	\$9,420	
Number of Trips							
Trip Costs						\$0	
<b>Task Total</b>						<b>\$9,420</b>	
<b>TOTAL</b>						<b>\$289,770</b>	<b>72.67%</b>

## TEXAS ATTORNEY SUBCONTRACTOR

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Clarion Associates shall affiliate with a Texas-licensed attorney, Jim Dougherty, to act as a subcontractor on this effort. The Subcontractor shall generally be available to consult on McKinney and Texas land use issues and to help ensure compliance of the new code with Texas land use law. More specifically, Subcontractor shall be responsible for the following scope of services:

### TASK 1: PROJECT ORIENTATION AND PROJECT MANAGEMENT

- The Subcontractor shall be available to participate in ongoing management and conference calls, as requested; and
- The Subcontractor shall prepare for, attend, and participate in the project orientation trip.

### TASK 2: CODE ASSESSMENT

The Subcontractor shall assist in development of Assessment report by advising on specific issues as requested by Clarion, focusing on applicable Texas law and regional and state best practices.

### TASK 3: PREPARE DRAFT DEVELOPMENT CODE

The Subcontractor shall review and comment on draft zoning ordinance installments and subsequent drafts, as requested by Clarion.

### TASK 4: ADOPTION

The Subcontractor shall review and comment on the executive summary of code, as requested by Clarion.