

Scope of Services

TASK I. Finalize Research Methodology & Scope of Services

After receipt of official “notice to proceed” from NOACA, consultant shall participate in a meeting with NOACA staff and the Executive Committee to define, in detail, the elements of the Scope of Work and project schedule to assure that the study will adequately meet the NOACA Board’s objectives and priorities in conducting this study.

The results of this meeting will be documented by the consultant and will be considered as supplemental material to, and part of, the Scope of Work.

TASK II. Establish Development Assumptions, Limitations & Options

A. The Consultants will review and document relevant background information including:

1. Zoning Codes for Avon, the immediately surrounding communities and the communities within the defined sphere of influence ;
2. The Comprehensive Land Use and/or Development Plans for Avon, the surrounding communities, the communities within the defined sphere of influence and Lorain and Cuyahoga County;
3. Background data as compiled from available sources, for the City of Avon, Lorain County, and the NOACA region to understand recent development trends with respect to:
 - a. Population, Employment and Housing,
 - b. Industrial and office development (including medical),
 - c. Retail - supply, demand, shopping patterns;
4. Recently completed highway/transportation studies for the vicinity of the proposed interchange;
5. Public transportation available within the project study areas and relevant trends in usage.

B. The Consultants will formulate appropriate assumptions and/or limiting considerations which will guide the focus of the study. These will be related to such factors as:

1. Whether the interchange is necessary based on sub-regional patterns (excluding the development of the immediately surrounding land);
 2. The relative rates at which development in the study areas and the sphere of influence will occur if the interchange is built or not built;
 3. Capital funding for the interchange and other necessary road improvements in the impact area (this information should be available from the project sponsor); and
 4. The level of utilities that would be provided to the area.
- C. The Consultants will determine the “sphere of influence” to guide further analysis in the study. The “sphere of influence” is defined as the geographic area in which the development patterns (or rate of development) will be materially altered if the interchange is constructed. The sphere of influence – both direct and indirect – will be mapped to the political jurisdictions of the NOACA region to determine which jurisdictions are influenced by the proposed development.
- D. The Consultants will formulate three (3) development scenarios, two based on the assumed construction of the interchange and one assuming that the interchange is not built (no-build).

Scenario 1 will be based on the current development plans provided by the project sponsor (City of Avon) assuming construction of the interchange.

Scenario 2 will be a full build assessment based on consultant’s analysis of the study areas development potential assuming construction of the interchange.

Scenario 3 will be a no-build assessment based on possible development assuming that the interchange is not built.

These scenarios will include analysis of:

1. Land uses and estimated development intensity (floor area/acre) with ranges as appropriate;
2. Expected level of development by 2030 or thereafter (the horizon year for NOACA’s travel demand model) with ranges as appropriate;
3. Expected traffic and truck generation (these will be planning judgments from a traffic engineering perspective); and
4. Expected road, intersection, or signalization improvements (these will be planning judgments from a traffic engineering perspective).

In formulating these scenarios the Consultant will consider:

1. The area’s regional location and existing access;

2. Developer and property owner representations and expectations;
3. Community characteristics, goals, and expectations:
 - a. Current Zoning and expected level of development based thereon,
 - b. Comprehensive Plan(s) and/or other formalized community objectives – Avon City, the surrounding communities, and Lorain County,
 - c. Perceived community attitudes toward development;
4. The “ripple” or spin-off effect and the interrelationship expected among the uses in the same general location;
5. Relevant planning documents – local, county, NOACA, ODOT, sphere of influence; and
6. Known infrastructure improvements being otherwise planned.

Much of the information above will be obtained through interviews the consultant will conduct with Avon officials, County (Lorain and Cuyahoga) officials, developers, business owners, real estate brokers and other stakeholders. Two (2) days will be reserved for the interviews. Those to be interviewed will be selected by the consultants and approved by the NOACA Staff prior to conducting the interviews.

(NOACA Staff will report progress on Tasks B, C & D to the Executive Committee as appropriate)

E. The results of Tasks II B, C and D above, including the planning assumptions, the definition of the sphere of influence, and the development scenarios will be reviewed by focus groups comprised of: Avon City officials, Officials from each of the surrounding communities (Avon Lake, Westlake, Bay Village, North Ridgeville, Sheffield Village), appropriate Lorain County and Cuyahoga County officials, key property owners, business owners in the vicinity, the general public, other interested parties, NOACA staff, and NOACA Executive committee members. Those invited to participate in the focus group(s) will be selected by the consultants and approved by the NOACA staff., prior to conducting the focus group(s). Appropriate methods will be used to invite the public and other interested parties to participate in this meeting.

G. Based on the results of E above, the consultant may recommend that the assumptions and development options be adjusted/refined, as appropriate. Once finalized, they will be the basis for the assessments in Tasks III & IV.

H. The results of B, C, D and E above and any recommended changes will be presented to the NOACA Executive Committee during one of the scheduled update reports.

TASK III. Assessment of Direct Impacts Benefit/Cost Analysis

(This task will be undertaken concurrently with Tasks IV& V)

The Consultants will use the IMPLAN economic impact model to complete portions of the impact analysis. The direct sphere of influence will be mapped to the political jurisdictions of the NOACA region to determine which jurisdictions are influenced.

- A. The Consultants will outline the economic assumptions that will be the basis for the analysis of the direct impacts. These will include, but not be limited to:
1. Annual sales or revenue by industry
 2. Capital improvements costs (e.g., road, bridge and other public infrastructure)
 3. Building construction costs by industry (e.g., office, industrial, residential, retail, etc.)
 4. Employee incomes based on jobs created
 5. Property, sales, and income tax rates
 6. The range of service costs to be considered – i.e. roads, police, fire, schools, etc – and the method for allocating these costs.
 7. Economic multipliers
 8. Market Demand Assessment – Based on the type of land uses resulting from the proposed interchange, the consultant shall determine the industries (industrial, retail, commercial/office/medical, residential) that would likely locate in Avon because of the new infrastructure. As part of this assessment, the consultant shall determine whether the new interchange would help meet the demand for property in underserved industries or create excess supply that simply creates excess supply that fosters regional economic shifts.
 - a. Identify comparable interchange improvement projects that have occurred over the past 10 years (at a minimum) and assess the type of development that has occurred by industry sector and whether firms at or near the interchange relocated from within the region or were new/expanded businesses.
 - b. Assess the local and regional industry mix to understand the potential for growth.
 - c. The market demand assessment will provide a basis for analyzing the potential shifting of economic activity in the study areas and determine the net economic and fiscal impacts associated with the interchange.
- B. The Consultants will estimate direct Revenue/Cost Outcomes for the three scenarios related to:

1. Construction of interchange and new commercial, industrial and residential developments
 2. On-going operation of new and expanded businesses and spending of new residents
- C. Direct revenue and cost impacts will include, but not be limited to:
1. Real property tax revenue to each taxing district
 2. Income tax revenue to the City/Avon and the state
 3. Sales tax revenue
 4. Other non-tax revenue such as fees ,etc., if applicable
 5. The capital costs associated with the development – to the City of Avon, the surrounding communities, Lorain County, the State, schools, other. These costs will consider – roads, utilities, schools, and other community facility requirements.
 6. The cost of services related to operations and maintenance for: roads, police, fire, schools, etc.
 7. Employment, labor income (payroll) and taxes created or supported from the multiplier effect

TASK IV. Assessment of the Indirect Impacts

(This Task will be undertaken concurrently with Task III & IV.)

- A. The Consultants will estimate and document the economic value of the development shift that will occur as a result of the construction of the interchange and the geographic area or “indirect sphere of influence” that will be impacted by such shift. The indirect sphere of influence will be mapped displaying rings that depict areas of high, medium and low influence over a political jurisdiction base map of the NOACA region..
- B. This element will specifically consider the shifts in:
 1. Industrial, medical and office employment – This will focus on the “labor draw area,” which will vary somewhat based on industry, average wages, skill levels, etc.
 2. Retail and service expenditures – This will focus on the “market draw area,” which will vary based on product or service type, supply within the region, substitute goods, marginal utility, etc.

3. Demand for housing – new construction compared to investment in existing homes, market and demographic trends, supply, interest rate trends, etc.
4. Reductions in municipal, school and county (other than Avon and Lorain County) revenue as a result of the shifts in 1 - 3 above.

This element will consider the extent to which the development in the “direct sphere of influence” is new development or a shift from other locations within the region.

- C. The Consultants will estimate material changes in traffic patterns – specifically, the surplus capacity occurring on existing streets – outside the “direct sphere of influence.” These will be planning judgments from a traffic engineering perspective.
- D. The Consultants will estimate the shift in the number of riders using public transit – bus and rapid transit including the possible impact of a park-n-ride lot at the interchange. This will be estimated from existing transit data and interviews with GCRTA and Lorain County Transit staff. These will be planning judgments from a traffic engineering perspective.

TASK V. NOACA Goals and Principles

Consultant shall prepare for review by the NOACA Executive Committee:

1. Preliminary observations with respect to the degree to which the impacts support NOACA’s Planning Principles and Transportation Goals. Elements of these Principles and goal that have not been addressed in this study will also be identified;
2. Alternative policies/strategies to address impacts; and
3. The general understanding of the implications of the above alternatives will have on all three study areas (Avon, Lorain County, NOACA region)

TASK VI. Progress and Status reports

The consultant shall provide the following progress reports during the conduct of this study:

1. Three (3) verbal status reports (using visualization techniques such as PowerPoint, display charts, photos, etc)) shall be made to the NOACA Executive Committee at its regularly schedule meetings in June, July and August, 2007

TASK VII. Draft Final Report

The Consultant will prepare a draft Final Report that documents the results (including all data, meeting summaries, presentation materials, etc) of Tasks I, II, III, IV & V, and be available for

review by the NOACA Executive Committee and NOACA staff in accordance with the attached Project Schedule . The consultant shall provide twenty-five (25) copies of the draft Final Report.

TASK VIII. Final Report

- A. The draft Final Report will be refined based on the comments by the NOACA Executive Committee and NOACA staff, and the Consultant will prepare and submit the Final Report in accordance with the attached Project Schedule.
- B. The Consultant shall prepare, for the September 14, 2007 presentation to the NOACA Board, an executive summary of the Final Report. Consultant shall provide fifty (50) copies of the executive summary.
- C. The Consultants will present the final report and results of the study:
 - 1. To a meeting of NOACA’s Executive Committee;
 - 2. To the full NOACA Board; and
 - 3. At a press conference held for the purpose of announcing the results of the study to the media and the general public.

(It is the intention that all three of these meetings will occur on the same day)

- 4. The consultant shall provide ten (10) copies of the Final Report and one(1) compact disc of the Final Report

PROJECT SCHEDULE									
PROPOSED WORK ELEMENTS	2007								
	May	June	July	Aug	Sept				
I. Finalize Research Methodology									
II. Develop Parameters & Development Options									
A. Review Background Material									
B. Formulate Assumptions									
C. Establish "Sphere of Influence"									
D. Formulate Development Scenarios									
E. Review assumptions, sphere of influence, etc. at focus groups									
F. Public Meeting									
G. Refine/Adjust Assumptions									
H. Present Meeting Results									
III. Direct Assessments									
A. Outline Economic Assumptions									
B. Revenue/Cost Outcomes									
C. Revenue/Cost Impacts									
IV. Indirect Impacts									
A. Estimate Development Shift									
B. Estimate Changes in Traffic Patterns									
C. Estimate shift in public transit									
V. NOACA Goals and Principles									
VI. Progress and Status Reports									
			S		X S		S		
VII. Draft Final Report								DF	
VIII Final Report									F,B,P

X – Written Interim Report
 S – Status Update (June 8, 2007, July 13, 2007, August 10, 2007)
 DF – Draft Final Report (August 24, 2007)
 F – Final Report (September 7, 2007)
 B – Board Presentation (September 14, 2007)
 P – Press Conference