City of Carroll

112 E. 5th Street Carroll, Iowa 51401-2799 (712) 792-1000 FAX: (712) 792-0139

MEMO TO: Honorable Mayor and City Council Members

FROM: Mike Pogge-Weaver, City Manager MJP-W

DATE: September 23, 2020

SUBJECT: US 30 Corridor Plan and Retail Recruitment

- Contract with RDG Planning and Design Group for the US 30 Corridor Plan
- Funding for the Carroll Area Development Corporation (CADC) in the amount of $150,000 over three years to support the development of a Retail Recruitment for Carroll

For a number of months, the City of Carroll and CADC have been discussing the challenges we are now facing with the retail environment in Carroll. While the City remains strong as a regional retail destination, with COVID-19 and the closing of JCPenney's, the retail environment in Carroll is facing new and unique challenges. At the same time, COVID-19 has caused some to change their shopping patterns with many staying more local versus traveling to Des Moines or Omaha areas to shop. Additionally, having a strong retail sector is important to a community's quality-of-life similar to other community amenities like parks, schools, library, and other amenities. To that end, it is important to double down on our efforts to help Carroll remain a regional retail destination.

To do that, a two-part process is being recommended. First is to hire a firm to help develop a US 30 Corridor Plan which includes a review of the entire US 30 corridor in the Carroll city limits with targeted work on the downtown area and the JCPenney's building. The second part, which will run concurrently with and extend over the next three years, is to retain the services of a firm to work on Retail Recruitment for Carroll.

This is an exciting partnership between CADC and the City of Carroll to write the next chapter for Carroll. While the JCPenney's building is a target space of this effort, it is not the sole focus. This partnership will work on vacant space overall, including highway corridor sites, mall space, plaza space, and stand-alone buildings in Carroll. While there are no guarantees on how successful this process will be, one guarantee that can be made is there will be no success without a community effort.

US 30 Corridor Plan

For this part of the project, RDG Planning and Design is proposed to be retained to complete the plan and will be led by the City of Carroll. RDG has completed past projects in the City of Carroll including the Carroll County housing study and more recently they worked on the Carroll Recreation Center Improvement project.

The main objectives of this Corridor Plan are:

1. A focused review of the core Corridor of Commerce area. This review would identify market opportunities, redevelopment opportunities, parking, current and future land use, need for public investments, and a review of city codes to ease development in Carroll and to encourage the desired type of development.
2. Review the remainder of the US 30 corridor, outside the core Corridor of Commerce area, including from Grant Road east to Pella/Farner-Bocken(Core-Mark) and from US Highway 71 west to the Wal-Mart area. This area would also have similar work completed as the Corridor of Commerce area including identifing market opportunities, redevelopment opportunities, parking, current and future land use, need for public investments, and a review of city codes to ease development in Carroll and to encourage the desired type of development.
3. With the upcoming JCPenney's closure, develop architectural scenarios to help potential future users understand how the building could be redeveloped, including a new façade, for a single user or for multiple users.

RDG Planning and Design will also work in concert with the retail consultant that would be hired by CADC to guide their planning process and to ensure cohesion between the two efforts.

Retail Recruitment

For this part of the project, TheRetailCoach is proposed to be retained to complete the retail recruitment and development strategy and will be led by CADC. The project will include:

- Analyzing the current market conditions
- Determine retail opportunities through retail gap analysis
- Identify development and redevelopment opportunities in the City
- Identify retailers and developers that could assist in recruitment of retailers
- Marketing of the retail opportunities in Carroll
- Recruiting retailers and developers
- Development of a unique downtown retail profile and gap analysis
    - Hold workshops with existing business owners on opportunities they have to grow in context of retail gaps in Carroll
- Ongoing Retail Recruitment Assistance

TheRetailCoach will also work in concert with the consultant that would be hired by the City of Carroll to develop the US 30 Corridor Plan to guide their planning process and to ensure cohesion between the two efforts.

Financial Investment

US 30 Corridor Plan

The City of Carroll will lead this part of the project by retaining RDG Planning and Design. The cost of this project is $60,000.

Retail Recruitment

CADC will lead this part of the project by retaining TheRetailCoach and staff the project. To support CADC efforts, it is asked that the City provide $50,000 per year for three years. The cost of TheRetailCoach is $97,000 over the three years and the remaining $53,000 will be used to cover CADC expenses and staff costs to work on the project.

Funding Source

These activities are not budgeted for in the FY 2020/2021 budget. With that said, there is urgency to move on these activities in order to position the City as we move past COVID-19 and the closure of JCPenney's. Staff would propose these be funded using Local Options Sales Tax funds. This is also a logical source as it will go directly back to boosting the local retail environment in Carroll. The annual investment would be as follows:

FY 2020/2021	$110,000
FY 2021/2022	$ 50,000
FY 2022/2023	$ 50,000
TOTAL	$210,000

STAFF RECOMMENDATIONS: Consider approval of the following items:

1. A resolution approving a contract with RDG Planning and Design Group in the amount of $60,000 for the US 30 Corridor Plan.
2. Approve a motion providing Carroll Area Development Corporation (CADC) $50,000 per year starting in Fiscal Year 2020/2021 for three years for a total of $150,000 to support the development of a Retail Recruitment for Carroll by retaining the services of TheRetailCoach and to support the administration of the project.

RESOLUTION NO. _____

A RESOLUTION APPROVING A CONTRACT WITH RDG SCHUTTE WILSCAM BIRGE, INC. (d/b/a RDG PLANNING & DESIGN) FOR THE US 30 CORRIDOR PLAN

WHEREAS, Chapter 17, of the Code of Ordinances of the City of Carroll, Iowa, provides that all contracts made by the City be approved by the City Council by resolution; and

WHEREAS, the contract with RDG Schutte Wilscam Birge, INC. (d/b/a RDG Planning & Design) for the US 30 Corridor Plan is attached hereto as Exhibit "A"; and

WHEREAS, it is determined that the approval of the attached contract is in the best interest of the City of Carroll, Iowa.

NOW, THEREFORE, BE IT RESOLVED that the contract with RDG Schutte Wilscam Birge, INC. (d/b/a RDG Planning & Design) for the US 30 Corridor Plan, attached as Exhibit "A", be authorized and approved, and that the Mayor and City Clerk are authorized to execute the contract on behalf of the City of Carroll.

PASSED AND APPROVED by the City Council of the City of Carroll, Iowa, this 28th day of September, 2020.

CITY COUNCIL OF THE
CITY OF CARROLL, IOWA

BY:_____
Eric P. Jensen, Mayor

ATTEST:

By:_____
Laura A. Schaefer, City Clerk

proposal to prepare the

U.S. 30 Corridor Plan

for Carroll, Iowa

August 21, 2020

Contact

Cory Scott, AICP
cscott@rdgusa.com
515.473.6394

RDg...
PLANNING ● DESIGN

September 4 2020

City of Carroll
627 N Adams Street
Carroll, Iowa 51401

RE:
US Highway 30 Corridor Plan

Dear Mike Pogge-Weaver:

RDG Planning & Design is excited for the possibility to work with City of Carroll to prepare the US 30 Corridor Plan, which includes the entire corridor in the city limits with a targeted study on the downtown environs and old JC Penny Building. This study will include recommendations for land use, mobility, and aesthetic enhancements.

Planning for corridors is a passion for us and an important focus of our practice. Our work in cities of all sizes throughout the Midwest have provided detailed and complete road maps for real development and helped communities view their home in new ways. Our plans have received considerable recognition, receiving numerous awards for Best Plan and, most importantly, Implemented Plan by state chapters of the APA. We are eager to apply our experiences and perspectives to Carroll, including our local experience working on the County's Housing Plan. Our team would make a great partner for you on this important project – here are a few reasons why:

» **Engagement.** Public engagement is the cornerstone of any plan, and as your partners, we will engage with community members to ensure we reach stakeholders. In light of the pandemic, we have been leveraging numerous techniques resulting in, arguably, greater engagement and participation.

» **Implementation Focus.** We take a strategic approach to our plans, providing clear directives that identify "what," "who," 'how," and "when." Comparable work to the JC Penny site has resulted in successful adaptive reuse and sometimes complete redevelopment. Matt Coen, AIA, has been instrumental in helping people understand possible scenarios and action steps.

» **Large and Small Scale Land Use Planning.** We know we will need to take a large scale perspective, understanding how development will affect the entire region. At the same time, smaller scale analysis of select sites will need to be done to understand future scenarios. Our experience working on both these scales will ensure an informed and unified vision for the city.

While we have experience with hundreds of similar plans, our team knows there isn't a "one size fits all" approach when it comes to planning, and will work with you to create a one-of-a-kind plan. Our team has two decade of history working together on projects locally and across the nation. The combination of our broad experience with our Iowa-pride will make us a valuable and committed partner.

Thank you for your consideration. We would be honored to work with you on this exciting project!

Sincerely,

Cory Scott, AICP
515.473.6394 | cscott@rdgusa.com

RDg...
PLANNING ● DESIGN

Firm Profile. . . . . Tab 1

Key Personnel. . . . . Tab 2

Projects + References. . . . . Tab 3

Scope of Services . . . . . Tab 4

Timeline + Fee . . . . . Tab 5

TAB 1

FIRM PROFILE

RDg...
PLANNING ● DESIGN

301 Grand Avenue Des Moines, Iowa | 515.288.3141

ABOUT US

We are a network of design and planning professional dedicated to applying our talents in extraordinary ways. We're architects, landscape architects, engineers, artists, and planners with a passion for design and a drive to make a difference. Beyond creating a vibrant community, we want you to enjoy the process of getting there. With offices in Omaha (NE), St. Louis (MO), and Des Moines (IA), we are employee-owned. More than 60% of our employees own stock in the company.

From our newest staff to the founding fathers that began their practices in the 1960's, we are dedicated to the collaborative planning process. Officially formed in 1989 as the Renaissance Design Group and crafted to bring well-established firms together into practice, our organization provides the right people for integrated solutions.

The Community & Regional Planning group provides a wide variety of design and planning services. With a growing national practice, we are a regional leader in urban design, downtown planning, housing studies, comprehensive planning, and enhancement of transportation corridors. Since our formation in 1989, we have worked in more than 300 large and small communities throughout the Midwest.

We believe in applying new ways of thinking and innovative approaches to the preparation of plans that address community and regional issues. At the same time, plan recommendations must be based upon a realistic assessment of the practicality of implementation. The resultant product, as evidenced by our numerous successful planning efforts and awards, is an innovative plan with an emphasis upon implementation.

73 LICENSED PROFESSIONALS

178 EMPLOYEES

75% OF STAFF ARE STOCKHOLDERS

33 LEED APS

OUR SERVICES

PLANNING AWARDS

2019 Transportation Plan - APA Iowa - Davenport Bicycle and Pedestrian Plan, IA
2019 Merit Award - ASLA Nebraska/Dakotas - Grand Forks Downtown Plan, ND
2018 Economic Development - APA Iowa - Spencer Riverfront Plan, IA
2017 Implementation - APA Iowa - Clear Lake Downtown Plan, IA
2017 Merit Award - ASLA Great Plains - Deadwood Alive! in Deadwood, SD
2016 Implementation - APA Iowa - Marshalltown City Center Plan, IA
2015 Daniel Burnham Award - APA Iowa - EnvisionCR - Cedar Rapids, IA
2014 Transportation Plan - APA Iowa - Mason City Bicycle and Pedestrian Plan
2013 Best Plan - APA Wyoming - Downtown Gillette, Wyoming
2011 Best Practice - APA Nebraska - Downtown Lexington, Nebraska
2010 Planning - ASLA Iowa - The Neighborhood at Indian Creek - Marion, Iowa
2010 Best Practice - APA Nebraska - Downtown Nebraska City, Nebraska
2009 Implementation - APA Iowa - Downtown Council Bluffs, Iowa
2009 ASLA Central States - Green Streets and Streetscape Handbook for Omaha
2008 ASLA Great Plains - Streetscape Handbook for Omaha
2008 Lady Bird Johnson Award - Green Streets for Omaha
2007 Best Practice - APA Iowa - Marshalltown City Center Plan, Iowa
2007 ASLA Great Plains Chapter - Green Streets for Omaha
2007 Plan - ASLA Iowa - Green Streets for Omaha
2005 Outstanding Plan - APA Iowa - Downtown Clear Lake, Iowa

TAB 2

KEY PERSONNEL

RDg...
PLANNING ● DESIGN

CORY SCOTT AICP

Lead Planner | 515.288.3141 | cscott@rdgusa.com

EDUCATION

2010, University of Nebraska at Omaha, Master of Science, Urban Studies

2000, Iowa State University, Bachelor of Science, Community and Regional Planning

REGISTRATIONS

American Institute of Certified Planners National Charrette Institute - Management & Facilitation

Since joining RDG in 2000, Cory has been involved in all phases of project development, including conducting research and focus groups to producing graphics and publications. Cory has been published in numerous articles, cited in academic studies, and spoken at conferences about market-based planning. His plans and passion for communities have resulted in millions of dollars of new investment - both public and private funds, and honored by numerous awards. Selected downtown and corridor plans include:

Iowa

- Belle Plaine
- Burlington
- Clear Lake
- Council Bluffs
- Dyersville
- Marshalltown
- Mason City

Kansas

- DeSoto
- Fort Scott
- Olathe
- Illinois
- Mount Vernon

Minnesota

- Bemidji
- Detroit Lakes
- Park Rapids

Missouri

- Trenton
- Milan

Nebraska

- Auburn
- Beatrice
- Columbus
- Falls City
- Gothenburg
- Kearney
- Lexington
- McCook
- Nebraska City
- Ogallala
- Plattsmouth
- Schuyler

North Dakota

- Grand Forks
- Mandan
- Williston

South Dakota

- Deadwood
- Sturgis
- Yankton
- Wisconsin
- De Pere
- La Crosse
- Waupaca
- Wauwatosa

Wyoming

- Buffalo
- Gillette
- Rawlins

Selected Corridor Plans

- Courthouse Avenue - Auburn, NE
- Highway 100 Corridor Study - Cedar Rapids, IA
- Bluff Street Redevelopment Plan - Council Bluffs, IA
- 6th Avenue Corridor Plan - Des Moines, IA
- Douglas Avenue Corridor Study - Des Moines, IA
- Ingersoll Avenue Improvement Study - Des Moines, IA
- Southside Revitalization Plan - Des Moines, IA
- West Lake Drive - Detroit Lakes - MN
- 71B Corridor Plan - Fayetteville, AR
- Highway 169 Study - Fort Scott, KS
- Northwest Land Use and Transportation Plan - Fargo, ND
- Stocktrail Neighborhood - Gillette, WY
- West Adams Street - Macomb, IL
- Academy Arts District Plan - Maize, KS
- Original Town Neighborhood Plan - North Platte, NE
- Highway 163 Corridor - Pleasant Hill, IA
- Spencer Complete Streets - Spencer, IA
- Blackstone Neighborhood - Omaha, NE
- Green Streets - Omaha Plan, NE
- Streetscape Handbook - Omaha, NE
- Maple Street Corridor Plan - Omaha, NE
- Mt. Rushmore Corridor Master Plan - Rapid City, SD
- MidTown and East Tosa North Avenue - Wauwatosa, WI
- South Central Neighborhood - Wichita, KS

CHARLIE COWELL AICP

Project Manager | ccowell@rdgusa.com

Charlie has experience across many fields of urban planning and implementation, including historic preservation, code writing, and active transportation. As a former planner with City of Sioux City, he worked with developers on site plan proposals, downtown greenspace improvements, code reviews, and drafting recommendations. Charlie's experience assisting developers and implementing plans translates into his success as a consultant creating realistic and sustainable recommendations for communities of all sizes.

EDUCATION

2013, University of Iowa, Master of Science Urban and Regional Planning

2011, University of Northern Iowa Bachelor of Arts, Economics

REGISTRATIONS

American Institute of Certified Planners

Land Use & Comprehensive Planning

- Grimes Comprehensive Plan Update - *Iowa*
- Kalona Comprehensive Plan Update - *Iowa*
- Plan Dyersville: Comprehensive Plan - *Iowa*
- Seward Comprehensive Plan - *Nebraska*
- Detroit Lakes Comprehensive Plan Update - *Minnesota*
- Derby Comprehensive Plan - *Kansas*

Development Ordinance & Guidelines

Charlie provides ordinance review on all planning projects and specializes in ordinance drafting and development.

- Grand Forks Downtown Form Based Code - *North Dakota* *(In progress)*
- Dyersville Zoning Ordinance Rewrite - *Iowa* *(In progress)*
- Bettendorf Zoning Rewrite - *Iowa*
- Pella Planning Services - *Iowa*
- Highway 141 Overlay Design Manual - *Grimes, IA*
- The Neighborhood at Indian Creek Design Standards - *Marion, IA*
- Camdenton Zoning Updates - *Missouri*
- Seward Zoning Updates - *Nebraska*
- Kalona Zoning Services - *Iowa*

Housing Market Studies

- Mitchell County Housing Study - *Iowa*
- Tri-County Housing Assessment - *Calhoun, Hamilton, & Pocahontas Counties, IA*
- Muscatine Housing Demand Study - *Iowa*
- Indiana Uplands Regional Housing Assessment - *Indiana*

Special District & Downtown Plans

- Pella Downtown Streetscape - *Iowa*
- Academy Arts District Plan - *Maize, KS*
- Dyersville Downtown Plan - *Iowa*
- Mandan Downtown Plan - *North Dakota*
- MidTown Tosa Plan - *Wauwatosa, WI*
- Waupaca Downtown Plan - *Wisconsin*
- West Lake Drive Corridor Plan - *Detroit Lakes, MN*

Historic Preservation Commission Liaison* – *Sioux City, IA*

Code Development, Enforcement, and Site Plan Review* – *Sioux City, IA*

**Indicates work completed while employed with another firm.*

LAURA KESSEL®

PLA, AICP, LEED AP

Landscape Architect | 515.288.3141 | lkessel@rdgusa.com

Laura combines her education and experience in landscape architecture and planning to create designs that work from the regional scale to the human scale. Laura strives to create timeless and sustainable designs that enhance our communities from an economic, environmental, aesthetic, and social perspective. Laura takes great care in servicing a community's needs whether designing a plaza that serves as the heart of a community; a park that nourishes the land and the people who use it; or a land use plan that allows for a strategic look toward the future.

Douglas Avenue Corridor Plan - *Des Moines, IA*

Williston Downtown Redevelopment Plan - *North Dakota*

Gray's Station Master Plan - *Des Moines, IA*

Main Street Landing Design Guidelines - *Davenport, IA*

Coralville Riverfront Master Plan - *Iowa*

Federal Avenue - Streetscape Improvements - *Mason City, IA*

Towncrest Urban Renewal Plan - *Iowa City, IA*

Iowa River Landing - Streetscape - *Coralville, IA*

Palmer College - Campus Master Plan Update - *Davenport, IA*

The Neighborhood at Indian Creek - Master Plan - *Marion, IA*

Kum & Go - New Headquarters Area Master Plan - *Des Moines, IA*

Chaplain Schmitt Island - Design Guidelines - *Dubuque, IA*

Forest Grove Park - Land Use Plan - *Bettendorf, IA*

Ankeny Comprehensive Plan - *Iowa*

US 69 - Corridor Study - *Bourbon County, KS*

MATT COEN AIA

Architect mcoen@rdgusa.com

Matt serves as an architect and economic development consultant in our architecture studio. With over 15 years of experience, Matt has built his career on community revitalization and economic development efforts including urban planning, infill development, historic preservation, housing, and public improvement projects. Complementing this work, Matt has extensive experience in corporate and institutional architecture projects.

Grand View University - Des Moines
Campus master plan

Des Moines Public Schools - Des Moines
Community stadium planning

Iowa State University - Ames, Iowa
Veterinary Diagnostic Lab

The Integer Group - Des Moines, Iowa
Design of interior rehabilitation

Flynn Wright Corporate Offices - Des Moines
Historic preservation and adaptive reuse of a building

ReMy Health Corporate Offices - Des Moines
Design of corporate office space

Legacy Foundation Offices - Ottumwa
Design of facade improvements and interior rehabilitation

Ames City Hall - *Phase II* - Ames
Design of interior rehabilitation

Hotel Maytag - Des Moines
Design of historic rehabilitation and adaptive re-use of abandoned hotel building

Drake University - *Des Moines*
Land use scoping

Grinnell College - *Grinnell*
Various planning studies

Vogel Building - Ottumwa
Design of historic restoration and adaptive re-use of abandoned hospital building

Parkway Lofts - Des Moines
Design of multi-family residential new construction

High Street Master Plan - Des Moines
Master planning of four-block corridor

Wilson Building - Clinton, Iowa
Design of historic restoration and adaptive re-use of abandoned office building into multi-family residential units

AMY HAASE AICP®

Advisor | ahaase @rdgusa.com

Since joining RDG in 1999, Amy has managed numerous projects including comprehensive plans, housing market studies, downtown and corridor redevelopment, neighborhood revitalization, park master plans, and transportation studies. Amy is a trusted leader in developing plans and leading public engagement processes that fit the needs of communities for communities of all sizes throughout the Midwest.

Amy managed the Carroll County Housing Study, which brings a regional understanding to the demographic and housing trends. She will provide remote assistance to the team.

Corridor and Neighborhood Planning (selected)

- Live Salina: A Strategic Housing and Neighborhood Plan – *Salina, KS*
- North Omaha Development Project – *Omaha, NE*
- Park Avenue Redevelopment Study – *Omaha, NE*
- Wintergreen Area Redevelopment Plan – *Omaha, NE*
- Neighborhood Redevelopment Plan – *Grand Island, NE*
- Downtown Revitalization Plan – *Norfolk, NE*
- Downtown Plan – *Seward, NE*

MARTY SHUKERT FAICP

Designer - Highway 30 | mshukert@rdgusa.com

Martin is a city planner/urban designer with over 40 years of experience. He served as Omaha's Planning and Community Development Director in the 1980s, leading major downtown/neighborhood reinvestment programs, writing comprehensive plan elements, developing/implementing the city's zoning ordinance, and trail development. Since 1989, he has continued his commitment to planning excellence and innovation in a variety of areas including transportation, transit and trails, downtown, housing, land use, redevelopment, corridor design, wayfinding, architecture, and more.

Marty has contributed to the design of hundreds of corridors throughout the Midwest. He will work with team to develop design concepts for the US 30 Corridor.

Iowa:	Burlington, Clear Lake, Council Bluffs, Marshalltown, Mason City, Oskaloosa, Pella, Perry, Shenandoah
Kansas:	De Soto, Fort Scott, Hays, Olathe, Shawnee, Topeka
Minnesota:	Bemidji, Detroit Lakes, Park Rapids
Missouri:	Excelsior Springs, Olathe, Saint Louis, Trenton
Nebraska:	Alliance, Fremont, Grand Island, Hastings, Lincoln, Kearney, Nebraska City, Omaha, Ralston, Papillion
North Dakota:	Grand Forks, Jamestown
South Dakota:	Deadwood, Rapid City
Wisconsin:	De Pere, La Crosse, Waupaca, Wauwatosa
Wyoming:	Buffalo, Gillette, Rawlins

TAB 6

PROJECTS + REFERENCES

RDg...
PLANNING ● DESIGN

Downtown Action Plan

Grand Forks, North Dakota

The City of Grand Forks initiated the Downtown Plan to make downtown a greater destination for people to visit, work, and live. The plan and process took a unique approach by focusing on creating a compendium of action plans that are tailored to specific audiences. These compendiums include: (1) development strategies, which focuses on targeted redevelopment of certain sites and design guidelines; (2) streetscape, which focuses on designing and rebuilding Demers Avenue, and (3) parks, which focuses on completely redesigning the city's signature downtown gathering space. The streetscape is being implemented before the plan's completion.

REFERENCE

Meredith Richards
Deputy Director, Community Development
701.792.2864
mrichards@grandforksgov.com

Armory Reuse Study

Park Rapids, Minnesota

The Armory is a 24,000 square foot building located in downtown Park Rapids. The former National Guard Armory building was constructed in 1922. The building was in use until 1992, at which time the State closed it. During the preparation of the Downtown Plan in 2007 (RDG), a developer from California began to investigate the possibility of rehabilitating the abandoned Armory. In 2010, the developer purchased the property and began the rehabilitation of the site and annex building. The feasibility study includes an architectural program and proforma for an event center and arts center (visual and performing). Since the study's completion, the facility was saved from the wrecking ball and has become the home of performing arts and restaurant.

Business Corridors Plan

Detroit Lakes

Detroit Lakes' downtown has long served as the city's center for commercial and civic life, and a regional center for health care. Within two years of this plan's adoption, millions of dollars in new public and private investment occurred. Much of plan's recommendations had been remarkably implemented, including the realignment of Highway 10, redevelopment of a 5-acre site at the gateway to downtown, circulation improvements, new mixed use projects, hotel, and healthcare services. In 2018, the city adopted an update to the plan that links the city's core to Lake Detroit. In addition, RDG was retained to update their future land use map to show the location of future land use, roads, trails, parks, and reinvestment areas.

REFERENCE

Larry Remmen
Community Development Director
218.846.7123
lremmen@lakesnet.net

US 69 Corridor Plan

Fort Scott, Kansas

The US 69 Corridor Management Plan, prepared by RDG and Felsburg Holt & Ullevig, establishes a unified vision to guide public and private development along the US 69 corridor in southern Bourbon County. The vision defines a framework for transportation and land use decisions to 2040, based on the opportunities and challenges that affect the nature and extent of potential improvements. The study evaluates future traffic operations to determine if and how the existing US 69 alignment can continue to provide safe and efficient travel well into the future. The implementation of this plan addresses both the local community needs and regional travel demands, and guides transportation and land development

REFERENCE

Mike Moriarty
Bureau Chief of Transportation Planning,
Kansas Department of Transportation
785.296.8864
mike.moriarty@ks.gov

US 6 Douglas Avenue

Des Moines, Iowa

The Douglas Avenue Corridor Plan is an older commercial highway that hosts many locally-owned businesses, single-family homes, multi-family residential properties, retail centers, and a hospital. The project emerged as a grassroots effort by the Douglas Avenue Coalition, which received resounding funding support for the plan from the city and county, The function and appearance of the corridor influences thousands of people on a daily basis who drive, walk, bike, shop, and live near the corridor. The plan presents scenarios for improving circulation along the corridor and to businesses, redevelopment opportunities, streetscape possibilities, and leveraging the river as a resource for stimulating investment.

REFERENCE

Laura Peters
Planning Committee Chair
515.283.4182
LAPeters@dmgov.org

Older Corridors Plan

Davenport, Iowa

RDG studied Davenport's older commercial corridors and recommended actions the City should take to encourage revitalization. The corridors included the Brady/Harrison/Welcome Way one-way pairs, Locust Street, and Rockingham Road. Two of these corridors, Brady/Harrison/Welcome Way and Locust Street, transverse the range of historical development in Davenport, from the downtown area through mid-century development areas to current suburban-style development. The third corridor, Rockingham Road, crosses the old heavy industrial district and reflects a mixed use development pattern, with residences in close proximity to industry.

REFERENCE

Matt Flynn, AICP
Senior Planning Manager
563.326.7743
mflynn@ci.davenport.ia.us

TAB 3

SCOPE OF SERVICES

RDg...
PLANNING ● DESIGN

PHASE 1: RESEARCH & ANALYSIS

1.1 COMMUNICATIONS PLAN

RDG will tailor the communications plan with city staff before the start of the project. Elements of the communications plan must be considered carefully to design an effective process that maximizes the city's resources and community participation. The process should include a spectrum of tools:

» **Steering Committee.** The steering committee meets at strategic milestones of the project to provide direction, mid-course correction, and review deliverables. A preliminary timeline and agenda is provided in scope..

» **Management Group.** The management group includes the project managers between the City and RDG. We will meet on a regular basis by video conference. Additional participants are pulled in when necessary.

» **Project Website and Video.** RDG will develop a website that will provide updates on the planning process and host interactive features to gain input. It will also include an introductory video filmed by RDG and narrated by local stakeholders.

» **Social Media.** RDG will schedule and coordinate announcements for existing social media. This will include 45-second videos that can be shared by committee members on their social media accounts.

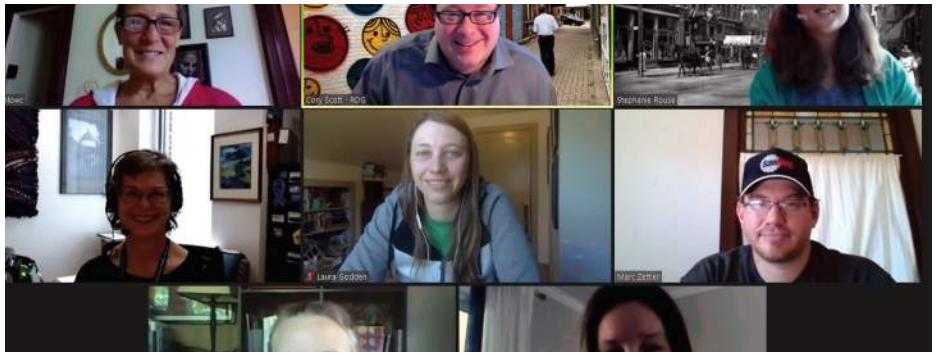
» **Project Logo.** A project logo will be developed to use as the brand for the project.

1.2 ENGAGEMENT

The overall planning process pivots from centralized events to decentralized engagement. Our pilot efforts in La Crosse have shown that engagement has substantially increased from past projects. While events may not have the energy of a large group gathering, the input and feedback are unmatched.

A. **Committee Meeting: #1: Kick-off Discussion.** This initial meeting will review the scope and schedule of the project. Also, it will begin to refine the specific objectives of the plan. In light of the pandemic, this meeting will be conducted by video conference to ensure inclusivity with everyone's comfort in participating.

B. **Committee Meeting #1a-1e: One-on-One Discussions.** We will follow-up with each committee member through video conference to discuss concerns and ideas for the future of the study area. This follow-up discussion approach has proven to be very effective to expand dialogue that can otherwise be time-constraint in the large group meeting.



C. **Online Survey.** Committee members and the general public will be invited to participate in an online survey, which will address the broader corridor and specific sites/buildings. It will include a visual listening exercise to understand personal preferences.

D. **Roaming Display.** RDG will design a roaming display that can be placed in a lobby or moved under a tent for community events. The display will be a low-tech version of the survey that's posted online. Local stakeholders will manage where and when the display will be located, but is best if displayed at existing events.

E. **Stakeholder Interviews.** Working with the Steering Committee and the city, RDG will identify stakeholders and conduct a program of discussions to address the project area, its dynamics, potential, and future directions.

F. **Committee Meeting #2: Walking Tour.** The project team will do a walking tour of the JC Penny building and downtown. Other segments of Highway 30 will be toured by bicycle. We have found this to be an effective approach to keeping socially distanced, building relationships, and learning about people's ideas and concerns.

G. **Concept to Implementation.** Subsequent tasks identify techniques to engage the public in the planning process, including the design studio, implementation workshop, and open house gallery.

1.3 CONDITIONS

The conditions report includes a memorandum that will be distributed to staff and committee members. This will provide the foundation for Phase 2.

A. **Data Collection.** RDG will compile existing maps and plans from various local, state, and federal agencies.

B. **Market Understanding.** This component provides a review of population and economic factors and projections. We will use U.S. Census information, ESRI data, Carroll County Housing Study, private demographic and economic information, and employment data. This data will be supplemented by content gathered during our stakeholder groups.

C. **Fieldwork.** The team will inventory building uses for the study area to understand the market's condition. Also, the team will gather and analyze material on transportation, walkability, parking, recreation opportunities, connections to neighborhoods, and overall image.

PHASE 2: PLAN CONCEPTS

2.1. ENGAGEMENT

A. **PUBLIC WORKSHOP: Design Studio.** During our second visit, the planning team will make extensive use of design studios in most of our urban design work. During the two-day studio, we work on-location with committee members and stakeholders to develop concepts for the action plan. Open sessions encourage the public to drop by informally to learn about the project and emerging ideas. Quick results and high energy are a fundamental part of the process. The studio will use the information gathered in previous parts of the process and will address:

- The guiding vision for Highway 30 and downtown.
- Key market focuses and opportunities.
- Major functional issues and public investment needs.
- Sub-districts, or "corridor nodes."
- Redevelopment opportunities, including test fits for development.
- Possible reuse of parking areas and under-used buildings for new development.
- Transportation concept showing circulation patterns and prototypical streetscape vignettes.
- Connections to adjacent neighborhoods and community destinations.

B. **Committee Meeting #3: Design Studio Concepts.** While committee members are encouraged to visit the project team during the design studio, we will host a follow-up video conference to discuss the results of the week's event. The meeting can be setup as a webinar, allowing the public to attend the meeting.

C. **Old JC Penny Building.** During the design studio, Matt Coen will meet with stakeholders at the JC Penny building to prepare preliminary program and site analysis.

- **Basic Programming and Site Analysis.** This study will result in the determination of quantity of unit types and sizes which can be used in the owner's pro forma to test the financial feasibility of two potential programs. The team will prepare a demonstration program for the reuse of the JC Penny building, showing possible circulation and tenant spaces.
- **Facade Concept.** The team will provide a concept for retrofitting the facade of the building.

PHASE 3: Plan Elements

Following the design studio, the team will refine the concept sketches and graphics to illustrate key concepts. These interim and refined plans are presented to the Steering Committee in preparation for the open house gallery.

3.1 ENGAGEMENT

A. **Committee Meeting #4: Concept Refinement.** Prior to developing the supporting narrative and storyboarding the publication, the planning team will meet with the steering committee to review the refined graphics from the design studio to gain further buy-in or course correction. This meeting can be setup as a webinar, allowing for the public to watch the meeting and submit write-in questions.

B. **Committee Meetings #4a-4c.** We will host small-group discussions to walk-through the concepts in small groups, allowing for more discussion, if desired.

3.2 PUBLICATION DRAFT

This task is the preparation of the plan document, creating the graphics and narrative associated with concepts and strategies for the district. We provided samples of work to Mike Pogge-Weaver that demonstrate our deliverable. The framework includes:

» **Discovery.** Background information that incorporates qualitative information from public input and our observations, and quantitative information from field research and data collection.

» **Vision.** A summary of themes and goals that guide the concepts.

» **Concepts.** Graphics will be developed to describe proposed projects in an inspiring way that can be used for funding support. These may include plan view maps, elevation sketches, perspective illustrations, or models. This includes each segment of the plan - the entire Highway 30 corridor in Carroll, downtown environs, and JC Penny building.

» **Supporting Narrative.** Language that accompanies the graphics, describing the concept and steps for implementation. The plan will include demonstration projects from other communities and case studies of comparable projects that help illustrate desirable outcomes.

» **Implementation Strategies.** Concepts will outline a framework of implementation steps and are discussed in Phase 4.

PHASE 4: Implementation Strategies

RDG's fundamental goal and commitment is to provide the city with a strategic vision that has lasting effects, which is possibly one of the most valuable characteristics of our plans.

4.1 ENGAGEMENT

A. **Committee Meeting #5: Implementation Workshop.** This workshop invites the steering committee, city staff, and key stakeholders to review concepts presented in the plan. Also, this meeting provides participants with the opportunity to provide changes to the draft document.

- **Priority Criteria and Phasing.** During the implementation workshop, the team works with participants to establish a set of criteria for determining the priority level of proposed projects. These priority criteria will be matched with the vision established in the public engagement process and used to recommend phasing for projects.

B. **PUBLIC WORKSHOP: Video Presentation.** The project team will record a presentation to post online that guides people through the plan's recommendations. Material from the presentation will be transposed to the Open House Gallery.

C. **PUBLIC WORKSHOP: Open House Gallery.** Adapting to the pandemic results in NOT scheduling large group gatherings. As alternative, we have shifted to creating gallery spaces for people to review content onsite or online. The online gallery will be placed on the project website and people can provide additional feedback on the plan. The onsite gallery includes an exhibit of posters than can be placed at city hall, library, or other venue. Again, participants can visit displays at their leisure and retain their level of comfort by being socially distanced.

4.2 PUBLICATION

A. **Implementation Strategy.** Content from the Implementation Workshop will be transposed to the report.

A. **Code Review.** RDG will conduct a review of the city's code that impacts projects.

B. **JC Penny Site.** RDG will provide a guide for next steps to advancing concepts.

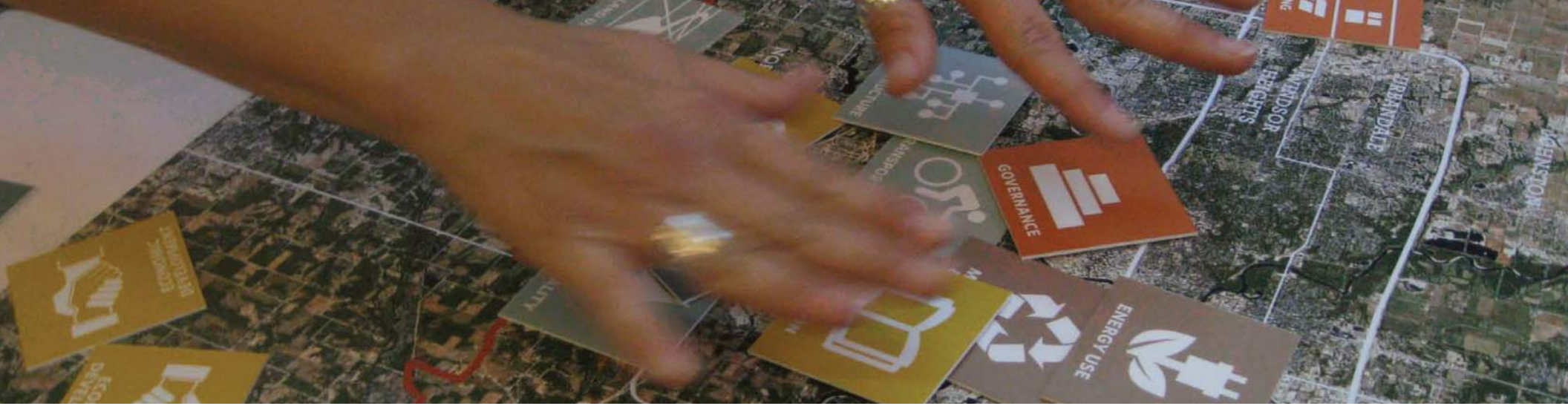
4.3 FORMAL APPROVAL

RDG believes in empowering the community to take ownership of the plan. To that end, RDG will aid the Steering Committee to present the plan at formal meetings. Alternatively, a representative of the project team can present at formal hearings.

TAB 4

TIMELINE + FEE

RDg...
PLANNING ● DESIGN



TIMELINE + AVAILABILITY STATEMENT

The plan is scheduled to take approximately 6 months.

Cory Scott will manage the overall process, while Charlie Cowell will manage day-to-day activities. The US 30 Corridor Plan comes at a timely moment for Cory and Charlie. They have or will be completing several projects by September 2020, including the Ames Comprehensive Plan (IA), Neenah South Commercial Street (WI), Fayetteville 71B Corridor Plan (AR), Bloomington Housing & Neighborhood Plan (IN) and Fargo's Northwest Growth Area Study (ND). The completion of these projects provides additional availability.

Some of the activities in the planning process are scheduled to be outdoors. We want to maximize public engagement and inclusivity by providing settings that are in open air. This approach has been extremely effective in our current work on the Downtown La Crosse Plan. Therefore, we recommend launching the process at your earliest convenience.

FEE - $60,000

The scope and available fee are not in alignment, so we are providing a cost that shows a proportionate of time for each phase.

PHASE 1: DISCOVERY - 4 weeks (September-October)

$10,000

PHASE 2: PLAN CONCEPTS - 4 weeks (October). In order to host outdoor activities, this phase wants to occur before colder weather sets.

$16,000 - $21,000

PHASE 3: PLAN ELEMENTS - 8-10 weeks (November-January)

$24,000

PHASE 4: IMPLEMENTATION STRATEGIES - 4 weeks (January-February)

$5,000

Exclusions:

> Streetscape illustrations are conceptual only, ideas that will require further stakeholder involvement, testing, engineering, and cost estimation.

> Advancing dialogue with DOT is excluded unless under separate agreement.

> Engineering services, including but not limited to civil engineering and traffic engineering.

AGREEMENT FOR CONSULTING SERVICES
BETWEEN THE CITY OF CARROLL, IOWA AND
RDG PLANNING & DESIGN

This Agreement is entered by and between the City of Carroll, Iowa hereinafter referred to as the "City" and RDG Schutte Wilscam Birge, Inc. (dba RDG Planning & Design), 1302 Howard Street, Omaha, Nebraska 68102, hereinafter referred to as the "Consultants."

WHEREAS, the City wishes to develop a U.S. 30 Corridor Plan for the city; and

WHEREAS, the City is committed to a planning process that provides community engagement in the preparation of the plan; and

WHEREAS, the Consultants have indicated a willingness to provide professional planning services to the City in the preparation of this plan.

NOW, THEREFORE, the parties hereto do mutually agree as follows:

Section One. Scope of Services

The Consultants agree to provide in a complete and professional manner the work elements set forth in *Exhibit A, Scope of Services*, attached hereto and incorporated into this Agreement.

Section Two. Additional Services

2.1. If, during the progress or upon completion of the work outlined in the Scope of Services in this Agreement, it is desirable or necessary to cause the Consultant to perform additional services other than those outlined in the Scope of Services, a fee for such services may be negotiated and agreed upon prior to commencing services.

2.2. Additional tasks may be added to this agreement by amendment(s) at such time the City is prepared to proceed with each Task.

Section Three. Time of Performance

3.1. The schedule for completion of project deliverables is on or before **April 30, 2021**.

3.2. The city's representative may extend the schedule beyond the completion.

Section Four. Responsibilities of the City

The City agrees to provide the Consultants with complete information and available maps and materials relevant to the completion of the services provided herein and to perform the following services:

4.1. **Access to Work.** The City shall make best efforts to arrange access to and make provisions for the Consultants to enter upon public and private lands as required for the Consultants to perform such work as inventories, field surveys, and inspections in the development of the Plan.

4.2. **Records, Files, and Previous Planning Efforts.** The City shall make all records and files (GIS data) relevant to the Plan available to the Consultants as needed and furnish all reasonable and necessary assistance in the use of such records and files. In addition, the City shall make previous reports and market studies available to the Consultants, along with all other studies and work that provide information pertinent to the completion of the Plan.

4.3. **Consideration of Consultants' Work.** The City shall give thorough consideration to all reports, drawings, and other documents presented for review by the Consultants and shall inform the Consultants of all decisions and comments within thirty (30) days to avoid undue delays.

4.4. **Steering Committee.** The City shall organize a Steering Committee to provide direction, review deliverables, and promote participation in the planning process. The City's Representative shall be the primary point of contact with the Steering Committee.

4.5. **Meetings.** The City shall provide logistical support for all meetings, including arranging for meeting places and assisting with notification of participants and citizens. The City shall further hold all required public hearings, serve all required notices, and fulfill all legal requirements associated with the project.

4.6. **City's Representative.** Mike Pogge-Weaver shall be responsible for the City's portion of the project management.

Section Five. Compensation and Method of Payment

5.1. Total compensation pursuant to the services specified in this Agreement, except as provided in Section 2.1, shall be a fixed-fee not-to-exceed Sixty Thousand Dollars ($60,000.00).

5.2. Payment for services shall be made monthly in proportion to services performed. All billings shall be accompanied by a written progress report describing the status of the project.

5.3. The fee includes all travel-related expenses for three (3) visits. Additional visits can be negotiated as provided in Section 2.

5.4. The fee includes the production of one hard copy and one electronic copy of the Plan. Production of additional copies shall be reimbursed at cost.

Section Six. Ownership of Materials

6.1. The City shall control all media releases or other publicity related to the completion of this project.

6.2. No report or map produced in whole or part under this agreement shall be the subject of a copyright application by the Consultants. The City becomes the owner of the project deliverables and has full right to use, copy, distribute and reuse such materials at its discretion without further cost or payment to the consultants. Reproduction or distribution of illustrations or renderings shall acknowledge the principal author, RDG Planning & Design.

Section Seven. Assignment

The Consultants agree that they are prohibited from assigning an interest in this agreement or delegating the performance of any of its duties hereunder without the written consent of the City.

Section Eight. Amendments

Either party to this Agreement may request an amendment or modification. Such amendment will not take effect unless incorporated into this Agreement by written amendment executed by both parties.

Section Nine. Nondiscrimination

In the execution of this Agreement, the Consultants shall not discriminate against any employee or applicant for employment because of age, race, religion, sex, sexual orientation, disability, national origin, age, marital status, or receipt of public assistance.

Section Ten. Termination

This agreement may be terminated by either party upon ten (10) days written notice should the other party fail substantially to perform in accordance with its terms through no fault of the other. In the event of such termination, due to the fault of others than this firm, this firm shall be paid for services and expenses to the date of such termination.

Section Eleven. Independent Contractor

In relationship to the City of Carroll, the status of the Consultants under and by virtue of this Agreement is that of independent contractor.

Section Twelve. Indemnification

The CONSULTANT agrees to fully indemnify, and hold harmless the CITY and their officers, employees, and volunteers from any and all loss, damage, liability, claim, demand, or cause of action whatsoever to the extent arising out of or resulting from any negligent act or omission or willful misconduct of the CONSULTANT, its officers, or employees in the performance of this Agreement. The CITY agrees to indemnify and hold harmless the CONSULTANT from and against any and all losses, liability, causes of action, costs, expenses, fines, penalties, charges or liabilities of whatever nature as may accrue against the CONSULTANT as a result of the negligence of the CITY in performing its obligations hereunder.

IN WITNESS WHEREOF, the AGREEMENT has been executed this ____ day of _____, 2020.

CITY OF CARROLL, IOWA
By:

_____
Eric P. Jensen
Mayor

RDG SCHUTTE WILSCAM BIRGE, INC. (d/b/a RDG PLANNING & DESIGN)
By:

_____

Amy Haase, AICP
Principal

TheRetailCoach.

Proposal For:

July 9th, 2020

Retail Recruitment & Development Strategy

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About The Retail Coach	2
Our Team & Proposed Personnel	3
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Project Pricing	19
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Client Testimonials	22

Prepared for:

The City of Carroll, Iowa

Prepared by:

Austin Farmer
Project Director
Ph: (817) 845-4220
Email: austin.farmer@theretailcoach.net

Qualifications & Experience

Your Retail Partner

We are a national retail consulting, market research, and development firm. Our experience combines strategy, technology, and creative marketing to execute high-impact retail recruitment and development strategies for local governments, chambers of commerce, and economic development organizations.

Since 2000, we have provided the research, relationships, and strategies needed to drive new retail developments in communities across the United States.

PROVEN RESULTS

5+ million

Square feet of new retail space recruited to client communities in the past five years

$600 million

Additional sales tax dollars generated in client communities in the past five years

650+

Communities throughout the US have trusted The Retail Coach with their retail recruitment efforts

Qualifications & Experience

Experts You Can Trust

Our team has more than 50 years of combined experience in retail recruitment and development. We pride ourselves on being consultants and not brokers. We only do what is in the best interest of our client communities and their future retail growth.

OUR TEAM OF RETAIL RECRUITMENT EXPERTS:

Kelly Cofer, CCIM
Founder & CEO

Aaron Farmer
President

Austin Farmer
Project Director

Charles Parker
Project Director

Nancy Dees
Finance Director

Matthew Lautensack
Director of Research & Development

Caroline Hearnsberger
Retail Recruitment Specialist

Kyle Cofer
Project Manager

Retail Recruitment
Experts You Can Trust

- 50+ years of retail recruitment and development experience.
- We are consultants, not brokers. We have no conflicts of interest and will do what is best for the long-term growth of your community.
- Member of the most exclusive retail professional network - CCIM.

Retailers Recruited to Client Communities

And Hundreds More...

Your Project Team

Austin Farmer
Project Director

Project Lead

Austin manages all of The Retail Coach's projects in Iowa and will be the primary point of contact for this project. Prior to joining The Retail Coach, Austin founded Catalyst Growth Partners, a strategic marketing firm specializing in supporting high growth companies, and served as Vice President of Global Marketing and Sales for an international tax advisory firm where he led domestic and international marketing initiatives and oversaw international market development. Austin started his career in marketing and digital strategy at GameStop, the world's largest video game and consumer electronics retailer. Since, he has held leadership positions in the economic development, non-profit, and financial services industries. A graduate of Texas A&M University, Austin received a bachelors degree in Marketing with a concentration in Entrepreneurial Leadership and was a member of the distinguished Mays Fellows Program.

Kelly Cofer, CCIM
Founder & CEO

C. Kelly Cofer leads The Retail Coach with more than 25 years of experience in all aspects of retail real estate and economic development. Mr. Cofer's professional background encompasses market research and site selection, advisory and leasing services, and property brokerage and development for leading national and regional retailers and restaurants in more than 150 cities throughout the United States. Mr. Cofer has earned the prestigious Certified Commercial Investment Member (CCIM) designation from the Chicago-based Commercial Investment Real Estate Institute and attended the Economic Development Institute at the University of Oklahoma. He holds a Bachelor of Science degree from Texas A&M University in College Station.

Aaron Farmer
President

With a degree in Marketing from The Mays Business School at Texas A&M University in College Station and an MBA from Texas A&M University – Commerce, Aaron brings to The Retail Coach knowledge of the most current research on retail and marketing trends. Prior to joining The Retail Coach, Aaron was employed in marketing research and retail development where he worked on projects for some of America's leading retailers and restaurants including FedEx, Kinkos, Sally Beauty Supply, Adidas, Concentra and the National American Association of Subway Franchises (NAASF). Mr. Farmer's expertise touches each step of a project from the initial trade area determination to the actual recruitment of retailers. Aaron is a sought after speaker for industry organizations throughout the country.

Relevant Experience

- Ankeny, IA
- Council Bluffs, IA
- **Fort Dodge, IA**
- **Pella, IA**

***Active clients**

OUR PROPRIETARY PROCESS

The **Retail360® Process:** Moving Beyond Data to Bring Retailers to Carroll

Retail recruitment is a process, not an event. Through our proprietary Retail360® Process, we offer a dynamic system of products and services that enable communities to expand their retail base and generate additional sales tax revenue.

The Retail360® Process identifies the strengths and weaknesses of your community to attract retail and highlights your community's advantage over competing cities. Through our multi-phase approach to recruiting new retailers, we're able to help communities build a long-term retail economic development plan.

Market-Based Solutions

We understand that no two communities are the same, and that each one has its own unique set of development and/or redevelopment needs. Therefore, we work with our clients to determine those needs and to offer custom, tailored solutions. Our strategies are data-driven and verified through our comprehensive Retail360® Process.

On-The-Ground Analysis

Just as each client has their own set of needs, we know that each client has a unique position in the marketplace as it competes to recruit new retailers. We spend time in your community with leaders and stakeholders, which enables us to determine your market position and identify retailers that fit your community.

Retail Action Plan

We analyze, recommend, and execute aggressive strategies for pursuing the ideal retailers, as well as coaching our clients through the recruitment and development process. This partnership typically produces the best results when, together, we derive short-term and long-term strategies based on market data and opportunities.

Summary of Scope of Work & Deliverables

1. Analyzing the Market

- Competing Communities Analysis
- Custom Retail Trade Area Map
- Retail Trade Area Demographic Profile
- Retail Trade Area Psychographic Profile
- City Demographic Profile
- Daytime Population Survey
- Discussions with Key Community and Business Stakeholders

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2. Determining Retail Opportunities

- Retail Gap Analysis
- Consumer Propensity Report

---

3. Identifying Development & Redevelopment Opportunities

- Analysis of up to Ten (10) Development/Redevelopment Sites
- Up to Twenty (20) Retail Site Profiles for Available Retail Sites

---

4. Identifying Retailers & Developers for Recruitment

- Target list of up to Thirty-five (35) Retailers with Contact Information
- Target list of up to Twenty (20) Developers with Contact Information

---

5. Marketing & Branding

- Retail Market Profile
- Retail Market Flyer
- Up to Thirty-five (35) Customized Retailer Feasibility Packages
- Developer Opportunity Package
- Online Retail Dashboard (Retail360 website)
- Interactive Site Mapping - Up to (5) Preloaded Sites

Continued on next page

Summary of Scope of Work & Deliverables

6. Recruiting Retailers & Developers

- Retail Recruitment Plan
- Retailer & Developer Recruitment Status Dashboard
- Monthly Recruitment Updates

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7. Downtown Retail

- Custom Retail Trade Area Map
- Downtown Retail Trade Area Demographic Profile
- Downtown Retail Trade Area Psychographic Profile
- Stakeholder Discussions & Workshop with Existing Business Owners to Share Mobile Location Data and Retail Gap Analyses

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8. Ongoing Retail Recruitment Coaching

- Ongoing Coaching & Support from The Retail Coach Team
- Representation of the City at Regional and National Retail Industry Events including ICSC Recon in Las Vegas

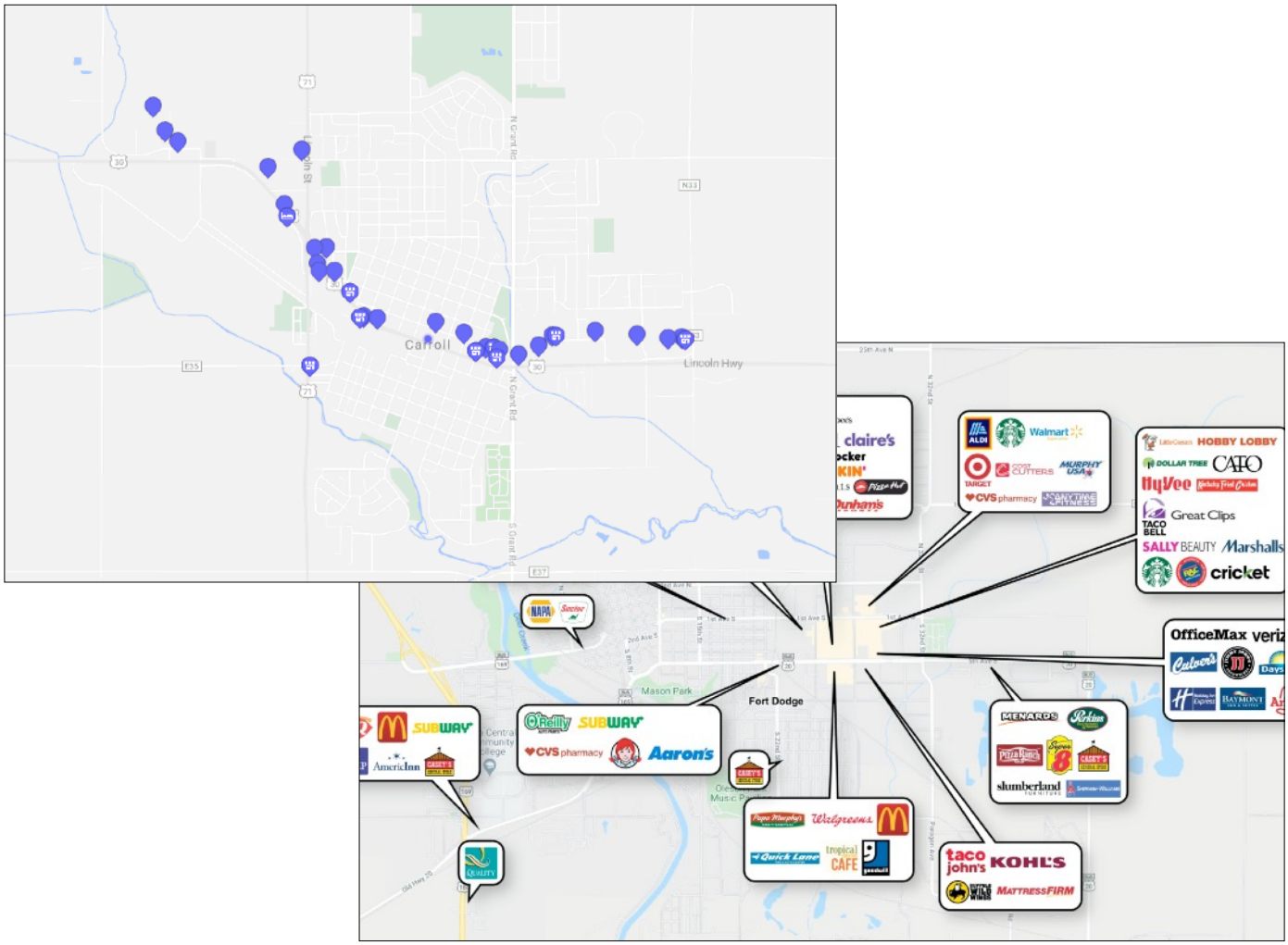
Analyzing The Market

The Retail Coach will perform extensive market research and analysis to evaluate the area and the Carroll community. This “macro” to “micro” approach enables The Retail Coach to analyze competitive and economic forces that may impact the community’s retail recruitment and development plan. The Retail Coach will gather market-specific data to assist in identifying Retail Trade Area boundaries, potential consumer bases, community issues and opportunities.

Competing Community Analysis

It is important to monitor what is occurring in area communities from a retail economic development prospective. What are their advantages and/or challenges? Are they experiencing positive or negative growth? What are their current retail offerings?

A community must have a clear understanding of the competitive nature of retail recruitment. Before analyzing the Carroll community, **The Retail Coach will look at competing communities to identify a competitive advantage**, via economic and market forces, that have a direct impact on retail recruitment and development in Carroll.



Analyzing The Market

Custom Retail Trade Areas

The Retail Trade Area is the geographical area from which the community's retailers derive a majority of their business. It is the foundational piece of the retail plan and its accuracy is critical.

We utilize retail trade area data when communicating with retailers and developers to ensure that the community fully leverages the amount of shoppers coming into the community. **The Retail Coach will hand draw retail trade areas for Carroll based on cell phone/GPS data from shoppers** as well as on-the-ground analysis from The Retail Coach team.

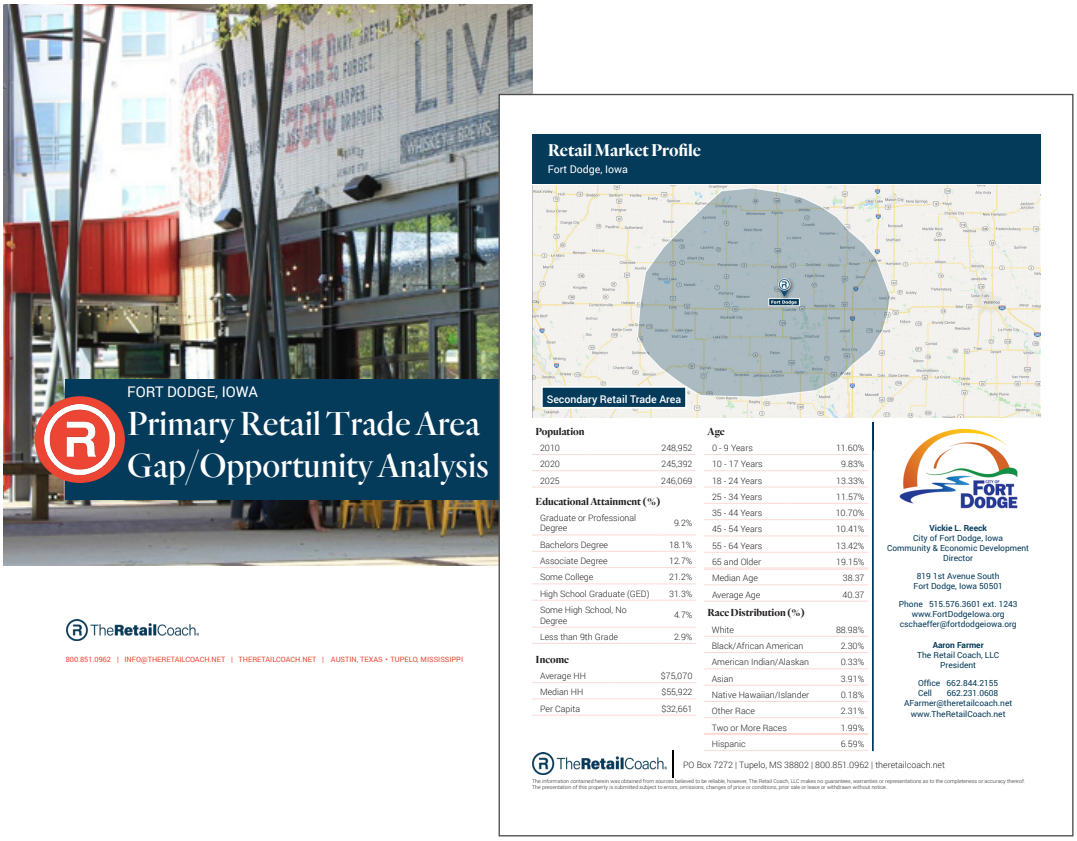
To best confirm a community's Retail Trade Area, we will execute the following strategic steps:

Mobile Data for Location Decisions

The Retail Coach will utilize mobile location technology that analyzes location and behavioral data collected from mobile devices to determine consumer visits to Carroll. This high-confidence data is used to verify Retail Trade Areas and validate retail site selection decisions.

Retail Trade Area Mapping

The Retail Coach will delineate a boundary map of the Retail Trade Area utilizing the mobile data collected



Analyzing The Market

Demographic Profiling

A community must be able to instantaneously provide information and data sets sought by retailers during the site selection and site evaluation process. The data must be accurate, current, and readily available.

The Retail Coach will create comprehensive 2010 Census, 2019, and 2024 demographic profiles for the Retail Trade Area and Carroll community. The profile includes population and projected population growth, ethnicities, average and median household incomes, median age, households and household growth, and educational attainment.

Psychographic Profiling

As retail site selection has evolved from an art to a science, psychographic lifestyle segmentation has become an essential element of retailers' preferred location criteria. Understanding a consumer's propensity to purchase certain retail goods and services—as well as specific retail brands—is valuable to national, regional, and independent retailers. Knowing the retail sectors and products that consumers demand removes a great deal of risk for an independent business.

Based on the market segmentation system developed by ESRI, **The Retail Coach will develop a Tapestry Segmentation Profile** of the households in the Retail Trade Area. This is done by using the most advanced socioeconomic and demographic data to measure consumer attitudes, values, lifestyles, and purchasing behaviors, to understand the sectors and brands of retailers that may be of interest.

Identification of Ancillary Issues Impacting Retail

We will work with the City to identify other root-cause issues of the local economy, and include recommendations for the City to improve opportunities.

The Retail Coach will provide an Ancillary Issue Report and Recommendations, including an analysis of current/projected trade area factors, housing availability and impact on retail, and a connectivity analysis to assess signage, roadway, landscaping, and mobility factors and their impact on retail growth.

Stakeholder Discussions

Buy-in from key community leaders and stakeholders is crucial to the retail plan. Our belief is that. "if they are not in on it and up on it — they may be down on it." One of our first meetings will be with independent businesses who may see our work as threatening.

The Retail Coach will obtain plan **buy-in from public and private stakeholders through a series of individual and group meetings.** Stakeholders may include City staff and representatives, community leaders, real estate brokers, retail developers, property owners, and owners of independent businesses.

Determining Retail Opportunities

Retail Gap Analysis

A community is able to quantify its retail demand through a Retail Gap Analysis, which provides a summary of the primary spending gaps — or opportunities — for 68 retail sectors. The analysis is ultimately used to identify recruitment targets for the community.

The Retail Gap Analysis will:

- *Identify retail sales surpluses and leakages for more than 68 retail sectors.*
- *Distinguish retail sectors with the highest prospect for success, and quantify their retail potential.*

The Retail Coach will determine the level of retail demand for the designated Retail Trade Area. The analysis computes the retail potential of the Retail Trade Area and then compares it to estimated actual sales in the community. The difference is either a leakage, where Carroll consumers are traveling outside the community to purchase certain retail goods and services; or a surplus, where consumers are traveling from outside to Carroll to purchase certain retail goods and services.

TheRetailCoach®

RETAIL TRADE AREA • GAP/OPPORTUNITY ANALYSIS

Lancaster, California

SECTOR	DESCRIPTION	POTENTIAL SALES	ACTUAL SALES	*LEAKAGE/SURPLUS	†LEAKAGE INDEX
44, 45, 722	**Total retail trade including food and drinking places**	**$5,466,572,222**	**$4,067,050,149**	**$1,399,522,073**	**0.74**
441	Motor vehicle and parts dealers	$1,050,303,888	$802,557,441	$247,746,447	0.76
4411	Automobile dealers	$934,073,328	$729,732,973	$204,340,355	0.78
4412	Other motor vehicle dealers	$44,306,969	$15,133,206	$29,173,763	0.34
4413	Automotive parts, accessories, and tire stores	$71,923,591	$57,691,262	$14,232,329	0.80
442	Furniture and home furnishings stores	$101,628,653	$59,928,392	$41,700,261	0.59
4421	Furniture stores	$47,840,570	$32,784,495	$15,026,075	0.69
4422	Home furnishings stores	$53,818,082	$27,143,897	$26,674,185	0.50
443	Electronics and appliance stores	$100,090,436	$75,793,267	$24,297,169	0.76
443141	Household appliance stores	$13,243,018	$8,207,687	$5,035,331	0.62
443142	Electronics stores	$86,847,417	$67,585,580	$19,261,837	0.78
444	Building material and garden equipment and supplies dealers	$269,438,023	$190,682,407	$78,755,616	0.71
4441	Building material and supplies dealers	$252,459,583	$184,512,421	$67,947,162	0.73
44411	Home centers	$143,040,298	$116,995,966	$26,044,332	0.82
44412	Paint and wallpaper stores	$4,653,594	$3,299,641	$1,353,953	0.71
44413	Hardware stores	$19,034,936	$10,055,639	$8,979,297	0.53
44419	Other building material dealers	$85,730,755	$54,161,175	$31,569,580	0.63
4442	Lawn and garden equipment and supplies stores	$16,978,440	$6,169,986	$10,808,454	0.36
44421	Outdoor power equipment stores	$1,698,914	$565,445	$1,133,469	0.33
44422	Nursery, garden center, and farm supply stores	$15,279,526	$5,604,541	$9,674,985	0.37
445	Food and beverage stores	$743,355,400	$493,775,993	$249,579,407	0.66
4451	Grocery stores	$690,138,519	$460,723,332	$229,415,187	0.67
44511	Supermarkets and other grocery (except convenience) stores	$671,420,560	$445,444,156	$225,976,404	0.66
44512	Convenience stores	$18,717,959	$15,279,176	$3,438,783	0.82
4452	Specialty food stores	$17,424,351	$8,986,552	$8,437,799	0.52
4453	Beer, wine, and liquor stores	$35,792,530	$24,066,109	$11,726,421	0.67

*Positive numbers denote leakage, negative numbers denote a surplus.
†A Leakage Index of greater than 1.0 means that the community retail sales include shoppers from outside the trade area (surplus). If the Index is less than 1.0, the members of the community are shopping outside of the community for their retail needs.

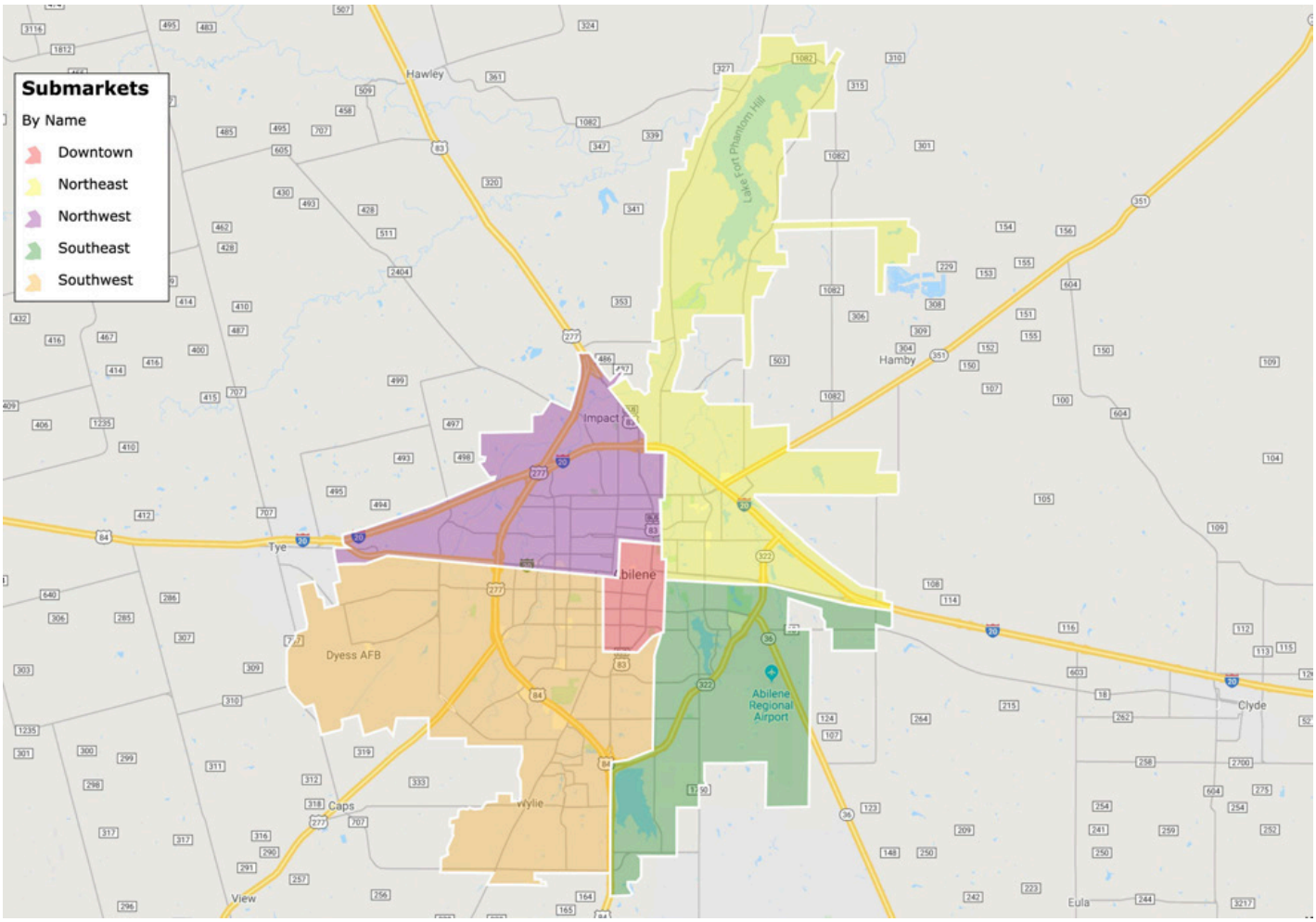
3

Determining Retail Opportunities

Submarket Analysis

Every community has multiple retail submarkets. Having a strong understanding of your community's submarkets and what drives retail in each submarket is vital to overall retail recruitment success.

The Retail Coach will provide a Submarket Analysis highlighting at least three (3) key areas of focus for retail growth, development, or redevelopment.



Identifying Development & Redevelopment Opportunities

Identifying and Marketing Vacancies & Development Sites

Retailers are interested not only in the market data on your community, but also in evaluating all available property vacancies and sites that fit their location preferences. A community must create and maintain a database of prime available properties along with accurate and current marketing information. Successful retail recruitment begins to happen with the introduction of available sites.

The Retail Coach will identify priority **retail vacancies and development/redevelopment sites** to market. Factors influencing site selection for priority sites will include:

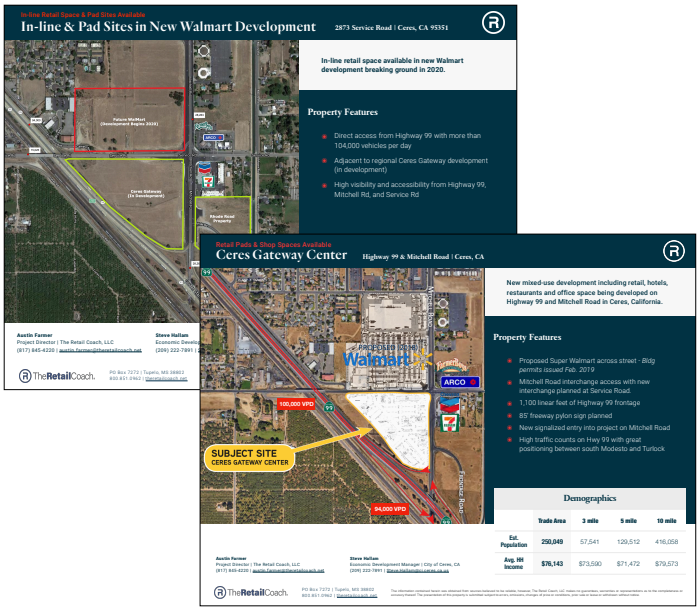
- Existing market conditions
- Retail Trade Area population
- Traffic counts and traffic patterns
- Site-line visibility from primary & secondary traffic arteries
- Ingress/regress
- Adequate parking
- Site characteristics
- Topography
- Proximity to retail clusters

Retail Site Profiles

A critical step in attracting retail is providing accurate and current information on each identified vacancy and site.

The Retail Coach will create a **Retail Site Profile** for each identified vacancy and site with current site-specific information, including:

- Location
- Aerial photographs
- Site plan
- Demographic profile
- Property size and dimensions
- Traffic count
- Appropriate contact information



Identifying Retailers & Developers for Recruitment

The Retail Coach has been successful in recruiting leading retail brands to our client communities for more than 18 years. Our process is driven by providing accurate and current data sets, as well as site-specific information to retailers that "fit" the community.

Identifying Potential Retailers

The Retail Coach will target national and regional retail brands that are a good "fit" for the community. This means that the Retail Trade Area population, disposable incomes, consumer spending habits, and education levels meet the retailers' ideal location criteria.

The Retail Coach **will develop and review a master list of potential retailers** with Carroll staff and work together to prepare a final target list of retailers for recruitment. This list will include retailers from TRC's analysis as well as new retail/restaurant concepts or regional retailers and restaurants that may be a good fit for the community.

Identifying Potential Developers

Much of our recruitment success comes from establishing a network of regional and national retail developers over the past 18 years. Developer networking and recruitment have become key components in a community's retail recruitment and development/redevelopment success. If a higher-tier retailer were to express interest in a community, and there was not sufficient ready-to-lease properties matching their needs and brand requirements, a developer must be identified to build the interested retailer a suitable property.

The Retail Coach will use its network to **identify retail real estate developers active in Carroll and the region for recruitment.** We will also work with Carroll staff to contact and build relationships with developers active in the region.

Marketing & Branding

Retail Market Profile

To attract targeted retailers, the most critical step is to provide accurate and current community data and site-specific information on available vacancies and sites. It is important that this marketing information positively reflects the community's attributes and brand to corporate site selectors, real estate brokers, and developers, because it is essential in making initial decisions about locating in the community.

The Retail Coach will **develop a Retail Market Profile tailored to the specific needs of targeted retailers'** essential site selection and location criteria for Carroll. The profile serves as a community introduction, and includes:

- Retail Trade Area Map
- Location Map
- Traffic Count Map
- Demographic Profile Summary
- Appropriate logo and contact information

Retailer-Specific Feasibility Packages

Unlike the more general Retail Market Profile, a Retailer Feasibility Package is developed to send specifically to the real estate department or broker for individual retailers.

The Retail Coach will **create Retailer-Specific Feasibility Packages to address essential location criteria.** These feasibility packages include:

- Community Overview
- Retail Site Profiles
- Location Map
- Retail Trade Area Map
- Existing Retailer Aerial Map
- Retailer Location Map
- Retail Trade Area Demographic Profile Summary
- Retail Gap Analysis Summary Table
- Retail Trade Area Psychographic Profile
- Retail Trade Area Demographic Profile
- Community Demographic Profile
- Area Traffic Generators
- Appropriate logo and contact information

Marketing & Branding

Developer Opportunity Package

Our team creates a Developer Opportunity Package to send specifically to retail developers active in the community and/or region to spark their interest in retail opportunities.

The Retail Coach **will create a Developer Opportunity Package to highlight development/redevelopment opportunities** in Carroll. This will include:

- Community Overview & Location Map
- Retail Trade Area & Demographic Trends
- Aerial Imagery & Traffic Counts
- Site-line visibility from major and secondary traffic arteries
- Ingress/egress for primary and secondary traffic arteries
- Median cuts or possibilities
- Traffic signal existence or possibilities
- Site characteristics and topography
- Area Retail & Zoning
- Residential clustering and support
- Proximity to “anchor” retailers
- Top Employers & Workplace Population
- Potential retail tenants

Online Retail Dashboard

Being able to quickly and easily access and share retail opportunity information greatly increases a community’s opportunity for success. To assist with this, we develop a custom online retail dashboard that can be accessed online anytime through a branded Retail360® link.

The Retail Coach **will create a Retail360® Retail Dashboard** for Carroll, which will be available for visual presentation and easy downloading of all data sets and marketing information. With a few clicks, retailers, brokers and developers can learn about your community’s retail potential like never before.

Interactive Site Mapping

Retail site selectors do much of their research while in hotel rooms and in airports, so a visual GIS platform that streamlines data and sites into one interactive and centralized location is a powerful tool.

The Retail Coach **will develop a concise, easy-to-access, interactive site mapping platform** for Carroll, along with the preloaded prime vacancies and development/redevelopment sites that we will be marketing. Data can be presented by demographic, socioeconomic, psychographic, and retail spending layers that are detailed down to the block level, to meet the needs of each individual user — whether they be a retailer, developer, or even a local entrepreneur.

Recruiting Retailers & Developers

Recruitment of Retailers

The Retail Coach is the **first national retail recruitment firm to introduce retailer and developer recruitment specifically for communities.** Eighteen years and 500 projects later, the recruitment of retailers remains one of the primary metrics of success. Today, our experience has proven that a community must move beyond just gathering data sets, and proactively recruit retail.

The Retail Coach **will actively recruit retailers on Carroll's behalf.** Our retailer recruitment process includes:

1. Introductory emails and retail market profile are sent to each targeted retailer.
2. Personal phone calls are placed to measure interest level.
3. Personal emails and retailer feasibility packages are sent to each targeted retailer.
4. Personal emails and retail site profiles for prime vacancies are sent to the appropriate targeted retailers.
5. Personal emails are sent to inform targeted retailers of significant market changes.
6. Personal emails are sent to decision markers once per quarter to continue seeking responses regarding their interest level in the community.
7. A retailer status report is provided with each retailer's complete contact information and comments resulting from recruitment activities.

Recruitment of Developers

Much of our recruitment success comes from having established a network of national retail developers over the past 18 years. Oftentimes, a retailer may have interest in a community, only to find that suitable "for lease" properties do not exist.

The Retail Coach **will actively recruit developers on Carroll's behalf.** Our developer recruitment process includes:

1. Introductory emails and opportunity packages are sent to developers.
2. Personal telephone calls are placed to measure interest level.
3. Personal emails are sent to inform developers of the status of interested retailers, and any significant market changes.
4. A developer status report is provided with each developer's complete contact information and comments resulting from recruitment activities.

Retail Conferences

We help communities connect with retailers and developers at retail conferences such as the annual ICSC Recon Conference and other regional events.

The Retail Coach **will assist in marketing Carroll, and its vacancies and sites, to retailers, developers, and brokers at retail industry conferences**.

Ongoing Retail Coaching

Retail Coaching

We partner with communities on a long-term basis and are available when clients have questions, new ideas, or need access to GIS mapping and current data statistics. We are also available if clients need to brainstorm opportunities as the community grows and develops.

The Retail Coach **will provide ongoing coaching and support for retail recruitment activities** for Carroll.

Project Pricing

Comprehensive Retail Recruitment & Development Plan

$37,500

Plus up to **$2,500** in reimbursable expenses

Includes:

- Analyzing the Carroll Retail Market
- Determining Retail Opportunities
- Identifying Development and Redevelopment Opportunities
- Identifying Retailers and Developers for Recruitment
- Marketing and Branding
- Actively Recruiting Retailers and Developers
- Downtown Workshop
- Ongoing Retail Recruitment

Work Fees

The total fee for completion of this work is **$37,500** payable in three installments:

a) **$15,000** upon execution of the agreement;
b) **$15,000** at 90 days following execution of contract;
c) **$7,500** at 180 days following execution of contract;

If Carroll elects to extend the agreement, the additional fee shall be **$30,000** for each additional 12 month period of data updates, recruitment and coaching. Work fees are payable within 30 days of receiving invoice.

Reimbursable Project Expenses

It is estimated that reimbursable expenses will not exceed **$2,500.**

Reimbursable expenses include:

a) All travel costs;
b) Cost of special renderings and maps, if any;
c) Cost of copies for reports and maps/drawings; and
d) Cost of shipping expenses, if any.

Project expenses are payable within 30 days after receipt of the expense invoice.

ONGOING SUPPORT

Optional Contract Extensions

Because we believe retail recruitment is an ongoing process, and not an event, we offer the ability to extend the project agreement for up to two additional years. Your agreement can be extended at any time to ensure you have the tools, resources, and support you need to successfully recruit retailers.

Year 2
Contract Extension

$30,000

Extends your agreement by an additional 12 months. During that 12 month period, you will continue to receive the following:

- Data Updates
- Site Evaluations
- Online Dashboard Update
- Access to GIS Site Mapping
- Recruitment of Retailers and Developers
- Coaching and Support from the The Retail Coach Team

Year 3
Contract Extension

$30,000

Extends your agreement by an additional 12 months. During that 12 month period, you will continue to receive the following:

- Data Updates
- Site Evaluations
- Online Dashboard Update
- Access to GIS Site Mapping
- Recruitment of Retailers and Developers
- Coaching and Support from The Retail Coach Team

PROJECT EXPECTATIONS

Project Timeline

Upon Signing Agreement	30-45 Days from Kickoff	60 Days from Kickoff	90 Days from Kickoff	120 Days through Remainder of Agreement
Kickoff	**Research**	**Analysis**	**Marketing**	**Recruitment**

REPORTING

The Retail Coach will provide written or electronic project updates on a bi-monthly basis.

COMMUNITY TRIPS

The Retail Coach team will make at least two (2) site visits to Carroll during the project.

PROJECT TIMELINE

The Retail Coach is available to begin work immediately upon agreement of terms with a project duration of 12 months.

Client Testimonials

"The Retail Coach is hands-down one of the best consultant teams of any kind that our team has had the pleasure of working with. Their extensive expertise and nationwide connections with site selectors, developers, and major chains have opened up new doors for the City of Lancaster, allowing us to take our recruitment efforts to the next level and collaborate with brands that hadn't previously considered our market. They work as an extension of our staff, anticipating needs and freeing up in-house staff time. I can't recommend the Retail Coach highly enough."

Chenin Dow
Economic Development Manager
City of Lancaster, California

"In my opinion, The Retail Coach's strategy and assistance has netted us over 325,000 square feet of occupied retail development during one of the most significant retail downturns in the last 20 years. Money well spent."

Samuel D. R. Satterwhite
Executive Director
Wylie Economic Development Corporation

"The location of Sprouts Farmers Market was a direct result of meetings coordinated by The Retail Coach between our community and site selectors at ICSC/Recon in 2012."

Warren Unsicker, CEcD
Vice President, Economic Development
Broken Arrow Economic Development Corporation

"For years I researched firms to help me with retail development and The Retail Coach continued to surface as the best choice provider. Over and over again I heard about their 'service after the sale.' This was important. You see a lot of firms can run data and put together fancy reports. What allows The Retail Coach to stand out is their coaching. A tool is useless unless someone 'coaches' you on the best way to utilize it. When you hire The Retail Coach you are not just buying data, you are hiring a coach to help you with your retail development needs. I highly recommend them to any community seeking to effectively recruit retail development."

Dave Quinn, CEcD, Executive Director
Previously Bastrop, Texas Economic Development Corporation
Currently Frisco, Texas