CITY OF BROKEN ARROW
EXHIBIT A, SCOPE OF SERVICES AND BUDGET
ELM & NEW ORLEANS STUDY

Planning Budget	CC	Cost	ADG	ADG Cost	
Task					
Scope					**Fixed Fee Totals**
1.0 Project Initiation		$ 5,225		$ 3,000	$ 8,225
1.1 Consultant shall coordinate a kick off call to: 1. Understand background narrative for New Orleans and Elm 2. Introduction of the project team members and EDC team 3. Establish goals, timeframes, metrics, and desired outcomes 4. Review data, demographics, existing studies, land use and other relevant information 5. Identify any major policy issues and project protocols which need to be outlined 6. Establish communication protocols and schedules for meetings and project milestones 7. Outline preferred format for deliverables 8. Establish list of available data sources and data request. 9. Catalyst will work with the EDC staff and steering committee to identify key stakeholders to engage as part of the Market-Based Strategy process. These may include major business owners, educational leaders, real estate brokers, developers, investors, young students, employees, small business owners, elected officials, and other organizations.	4	$ 1,100			$ 1,100
1.2 Assessment of site conditions -- Tour New Orleans and Elm intersection as well as other adjacent city intersections to understand existing land uses, development patterns, density, parking ratio, property boundary lines, back of house function, signage and multi-modal accessibility.	6	$ 1,650		$ 1,500	$ 3,150
1.3 Assement of shopping center conditions -- street circulation, pedestrian circulation, existing land uses, relationship to retail customers and business users.	5	$ 1,375		$ 1,500	$ 2,875
Deliverable: Brief summary, project timeline, and public engagement plan	4	$ 1,100			$ 1,100
2.0 Market Study		$ 32,863		$ -	$ 32,863
2.1 Trade Area Analysis - To develop a trade area for New Orleans and Elm, Catalyst will sample customer patterns using customer intercepts to develop a statistical retail trade area using customer intercepts. Catalyst will use the aggregate data to create an overall primary trade area (PTA).	5	$ 1,238			$ 1,238
2.2 Retail Leakage - Catalyst will use the aggregate retail trade area from the customer intercepts to identify accurate residential demand, workforce demand, commuter demand and visitor demand from attractions to determine the capacity for additional retail. This process will include a retail leakage/surplus analysis but also take into account other drivers that drive retail sales and growth.	4	$ 1,100			$ 1,100
2.3 Competition - The Catalyst team will work with the retail committee to identify 5 peer communities for benchmarking. Benchmarking will compare retail factors, income, population growth rate, total population, purchasing power, pull factor, commute times, daytime population and other factors.	5	$ 1,375			$ 1,375
2.4 Cannibalization - Catalyst shall explore adjacent retail nodes which impact Broken Arrow's retail market. This includes Bixby, Jenks and Tulsa and other surrounding communities. This analysis shall consider the impacts of local market and more importantly, how Broken Arrow could position itself strategically to be more competitive and sustainable in context of local market factors, market demand, and other retail influences.	8	$ 2,200			$ 2,200
2.5 Consumer Profile - As part of this process, Catalyst shall develop a consumer profile for Broken Arrow. The profile will consider dominant psychographics, buying habits and preferences, including assessment of categorical spend that is above/below national averages. This process will explore nuances which may enhance the retail recruitment narrative, including cultural trends, concentration of various cohorts, and unique characteristics which can support retail attraction of choice retailers.	11	$ 3,025			$ 3,025
2.6 Retail Conditions - Catalyst, using existing retail districts and typology, shall identify the SWOT for Broken Arrow's existing mix of retail and index the retail health for neighborhood centers, malls, destination retail, urban retail and other formats. This process will help identify and prioritize retail recruitment efforts and how to inform future development guidelines, development standards and threats associated with formats which may be at risk.	12	$ 3,300			$ 3,300
2.7 Property Assessment - Catalyst shall inventory the top 5 major retail properties, including existing and planned development sites and existing vacancies. The inventory will include size, proposed development program, co-tenants, anchors, summary of area, demographic summary, aerial map showing local attributes, and contact information (if available). This information can be used for retail recruitment purposes and future retail benchmarking.	14	$ 3,850			$ 3,850
2.8 Market Conditions - Catalyst will address the key deterrents to investment in the area by evaluating relevant market condition issues such as the amount of various businesses, vacancy, pricing, etc. Catalyst will work with the retail committee to identify areas which may have obsolete zoning, or that the land use may indicate imbalance of retail based upon market conditions and future capacity. This process will evaluate if there are opportunities for better transitions between uses, and opportunities to transition some retail districts in to mixed-uses or alternative uses.	28	$ 7,700			$ 7,700
The consultant will draw general conclusions from the information gathered and will highlight the most significant findings and projections of the market analysis. Catalyst will then bridge these findings into the market-based study.	13	$ 3,575			$ 3,575
Deliverable Written summary of a Market Study with charts, graphs, supporting text.	20	$ 5,500			$ 5,500
3.0 Market Based Strategy		$ 6,050		$ 2,500	$ 8,550
3.1 Retail Identification - Catalyst will develop a New Orleans and Elm-specific profile for the top 40 retailers that would align with various areas across the City. For each retailer, Catalyst will consider district context, city goals, developer vision, market needs, leakage/demand and locational and operational requirements of each retailer.	8	$ 2,200			$ 2,200
3.2 Area Interventions - We can evaluate the viability of future retail in context of current market trends, economic conditions, available resources, fragmented ownership and regulatory environment. . Catalyst can identify other potential retail strategies that would be best for Broken Arrow, including the special zoning districts, financial incentives, and public/private improvements.	3	$ 825			$ 825
3.3 Land Use Strategy - Catalyst shall make the case for alternative land uses for New Orleans and Elm. We will include the strategy to integrate mixed-uses to improve, enhance or replace retail. This could include the introduction of retail/commercial at the intersection, or urbanization of existing retail to create greater vibrancy and economic output. As part of this process, Catalyst will work with the retail committee and local staff, land owners, major stakeholders and brokers to identify issues and opportunities, followed by a review of New Orleans and Elm for recommendations.	4	$ 1,100			$ 1,100
3.4 Design Framework - In conclusion to creation of the Market-Based Strategy, Catalyst will develop an implementation plan and additional concept planning that will set a standard for the area's built environment moving forward.	3	$ 825			$ 825
3.5 Assess and leverage market analysis from Comprehensive Planning initiative and prepare base maps from existing data for the study are for Elm and 101st.	4	$ 1,100		$ 2,500	$ 3,600
4.0 Community Engagement		$ 6,800		$ 5,000	$ 11,800

Description	Qty	Labor		Expense		Total
1.3 Consultant shall prepare for and facillitate a 1.5 day workshop with opening and closing stakeholder presentation open to the community. The workshop will explore the following: a. Retail merchandising strategy that can enhance and improve commercial vitality and activation of commercial centers and create greater vibrancy and performance b. Explore opportunities for greater transitions from neighborhood commercial to adjacent neighborhoods focusing on context of existing uses and market potential. c. Identify and analyze catalyst opportunties for the Elm and 101st intersection. d. Assess graphics - allows for up to 4 oversize boards summarizing the project and surrounding area and use of software to allow real-time modeling of possible development scenarios	12	$	3,300	$	4,000	$ 7,300
2.2 Interview of existing property owners, local lending professionals, bankers, shop owers and local customers. These will be a series of 10-15 separate interviews with key stakeholders that can provide strategic feedback on the major issues, opportunities, challenges and insights within the region. The team will work closely with EDC/Chamber staff to allow for various input along the process.	6	$	1,750	$	1,000	$ 2,750
2.2 Focus Groups - Catalyst will host round table discussions from various stakeholder groups of 8-10 representatives from various economic and social cross sections (workforce development, education, economic development, city operational goals and strategy, major employers, etc).	6	$	1,750			$ 1,750
3.0 Revitalization / Redevelopment Plan Options		$	688	$	3,000	$ 3,688
3.1 Market analysis projections and data	1	$	206			$ 206
3.2 Iterative set of three (3) plan options for the site. Graphics for each option will include an overall plan view and one (1) perspective shot. Plans will include: land use, parking, access, walkability, circulation, landscape concept, placemaking concepts and connections with local neighborhood.	1	$	206	$	2,500	$ 2,706
3.3 Implementation strategies	1	$	275	$	500	$ 775
4.0 Workshop #2		$	2,200	$	2,500	$ 4,700
4.1 Present plan options, market capture and draft implementation strategies at 1-day workshop in Broken Arrow. Allows for up to 4 oversize boards summarizing the project and surrounding area.	4	$	1,100	$	2,000	$ 3,100
4.2 Assess comments and inputs from client group, retailers and citizens	4	$	1,100	$	500	$ 1,600
5.0 Post Workshop Refinement and Tech Memo		$	413	$	3,300	$ 3,713
2.1 Post-Workshop design refinement of 101st and Elm concepts and in-fill strategy including catalytic redevelopment, transitions, improved connectivity, gateways and linkages.	1	$	138	$	1,500	$ 1,638
2.2 Preparation of Final Report including CIP strategy, activation plan and merchandising strategies with an outline of a critical path to improve sustainability and virtous cycle.	1	$	138	$	800	$ 938
2.3 Preparation and presentation of final Powerpoint to Council, EDC and Chamber of Commerce (extra meetings hourly)	1	$	138	$	1,000	$ 1,138
Support development of design standards, incentive structure, infrastructure coordination inentititlemnet process	Hourly					Hourly
Total Labor (not including ordinary out of pocket expenses or hourly)		$	54,238		$ 19,300	$ 73,538
Catalyst estimated Reimbursable Expenses for 2 trips (air and 4 nights hotel)		$	1,000		$ 1,000	$ 2,000
Total estimated Phase 1 Budget (excluding hourly support for entitlement process)		$	55,238		$ 20,300	$ 75,538