

Proposal for Professional Services

Blount County

S&ME Project No. 22-05-0604



September 23, 2022

Ms. Katie Kerr
Purchasing Agent
385 Court Street
Maryville, TN 37804

Reference: **Proposal for Professional Services**
Blount County
Comprehensive Plan
S&ME Project No. 22-05-0604

Dear Ms. Kerr,

S&ME, Inc. (S&ME) appreciates the opportunity to submit this proposal for Professional Services for the referenced project. This proposal is based on the selection of S&ME by the County through a Request for Proposal. This proposal provides a brief discussion of our understanding of the project, our proposed scope of work, and our associated fees. Our Agreement for Services, form AS-071, is attached and incorporated as part of this proposal.

This proposal is solely intended for the services described below. Use of this proposal and resulting documents, including the final deliverables, is limited to the above referenced project and client. No other use is authorized by S&ME, Inc.

◆ PROJECT INFORMATION

We understand the scope of the project includes the preparation of Comprehensive Plan, GIS mapping, and stakeholder & public engagement. This project is intended to support Blount County as it projects a 20-year planning horizon.

S&ME is proposing to perform the following services as outlined below to be completed over a one year timeframe.

◆ Scope of Services

Task 1 – Community Inventory & Analysis

S&ME recognizes that in order to adequately plan for the future, there must be a detailed and accurate inventory of existing conditions, local history, infrastructure, and populations. Through a variety of analysis tools, our team will capture a snapshot of the community as well as project community trends into the next 20 years. We will accomplish this task through:

- Current and Future Land Use Mapping
- Mapping of existing and proposed transportation infrastructure
- Population Projections based on regional growth projections and census data

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- Evaluation of school impacts. This will rely on available data provided by the School Board describing school capacity, as well as information from the County relating to number of units approved per project.

Task 2 – Land Use Plan Audit

S&ME is a research-oriented planning team, with skills in analysis and data collection. Our team will assess and summarize all existing plans and projects affecting the County in order to properly inform our approach and recommendations. We will accomplish this task by:

- Matrix of existing policies
- Summarizing all plans with a literature review

Task 3 – Public Engagement & Education

Public Engagement is essential to the success of a Comprehensive Plan. Public Engagement is not simply a task to be crossed off a list; it is an ongoing process that continually informs and shapes the development of a plan. S&ME is skilled in public engagement strategies and will ensure that community members are included and valued during the creation of the County's Comprehensive Plan Update. We will accomplish success Public Engagement Through:

- Two Steering Committee Engagement Roundtables. The first meeting will occur within the first two months after execution of this contract. It will include 7-12 members of the public and held at the Blount County Court House. The purpose of the meeting will be to gain input from a varied group of stakeholders, with the goal of guiding the S&ME team towards an effective public engagement program and to set the overall tone of the project.
- Blount County specialized Website on Social Pinpoint with an interactive map and survey. The website will house existing documentation for reference, a schedule, links to meetings, minutes or videos of meetings where applicable, summary reports, and activities to gain feedback throughout the process. It will also offer opportunities to provide comments and leave input.
- One-in-person public workshop. This will include a virtual option as well to gain the most attendance possible. This meeting will occur at the Blount County Courthouse and will introduce the project, encourage discussion and provide information on how to participate throughout the project.
- Two in-person public open houses at different areas in the County. These open houses will be an informal format where the public can stop in at their convenience to visit different stations the S&ME team will set up for the purpose of gaining input. This will also offer the public an opportunity to chat with the team on specific concerns or interests they have for the plan.

Task 4 – Plan Development & Content

S&ME's placemaking team has years of experience drafting, reviewing, and editing Comprehensive Plans. Our commitment to technical excellence is insured by our two-reviewer process, in which every deliverable is reviewed by at least two senior reviewers before it is submitted. We will draft, edit, and submit a successful Comprehensive Plan through:

- A collaborative, team-centered approach to drafting a plan
- A multi-stage editing and review process
- As mentioned above, a final review by two senior reviewers



- One round of revisions

Task 5 – Public Hearing & Plan Adoption

S&ME will create professional, streamlined presentation content that will summarize and illustrate the recommendations of our plan. Our team is skilled in public speaking, and we believe that proper communication of the plan is just as important as the contents contained in the plan. We will achieve a successful presentation of Blount County’s updated Comprehensive Plan by:

- Ensuring graphics and design in the plan are consistent with the presentation for a professional and polished appearance
- Designing engaging and interactive presentations through handouts and discussion facilitation.
- One presentation to the Planning Commission and two presentations to County Commission.

◆ Fee

Our professional fees for the above-described services will be invoiced as per the below fee schedule. Excluded in the below fees are reimbursable expenses incurred on the Project’s behalf, including mileage, printing, plotting, photocopies, reproduction, postage, long distance telephone, facsimile, express mail and/or courier services. Applications, capacity and impact fees associated with application filings shall be the responsibility of the Owner or reimbursed to S&ME outside of the expenses contained in this proposal. S&ME will bill monthly for all work performed and expenses incurred on the Project’s behalf. Unpaid invoices after 30 days will accrue service charges at 1 1/2% per month and include any costs of collections and reasonable attorney’s fees.

Task	Fee
Task 1: Community Inventory & Analysis	\$20,400
Task 2: Land Use Plan Audit	\$15,540
Task 3: Public Engagement & Education	\$27,020
Task 4: Plan Development	\$30,620
Task 5: Public Hearing Adoption	\$12,360
TOTAL	\$105,940

Should conditions be encountered such that additional services appear to be in the best interest of the project, we would contact you with our recommendations prior to proceeding with any services beyond the scope of this proposal. We will not exceed this proposal amount without written authorization from you.



◆ Deliverables

S&ME will work with representatives from Blount County to develop the following work products:

1. An updated Comprehensive Plan which will include updates to all elements. The plan will analyze population projections, ERSI data and existing conditions. An update of the infrastructure and transportation portions of the plan will include an evaluation of Capital Improvements well as consideration of the Thoroughfare Plan. The Comprehensive Plan will take into consideration applicable County plans and include projects outlined within the planning horizon for consistency.
2. Implementation schedule. This will include strategies and timing for implementation of the programs identified in the plan update.
3. A Social Pinpoint© webpage for the project to be housed as a link from the County's website.
4. A GIS Land Use Map

◆ Client Responsibilities

County to provide studies and plans for review, provide direction on goals & priorities, determine which stakeholders are to be included, and provide locations for stakeholder meetings.

◆ Assumptions and Limitations

Services proposed herein are for general planning analysis relating to preparation of the Comprehensive Plan.

The following services are excluded from this proposal.

- Additional mapping or revisions
- Additional meetings, workshops or public engagement sessions

◆ AUTHORIZATION

An Agreement for Services (AS-071) is attached and incorporated as a part of this proposal. Please sign the agreement and return to our office as your authorization of the proposed scope of services and the associated fee. Upon receipt of the signed agreement, we will execute the agreement, return a copy to you, and proceed with the performance of our services. Any changes or modifications to AS-071 or the proposal are required to be acknowledged by both parties initialing acceptance of this proposal and agreement for services next to the change or modification.

If you elect to accept our proposal by issuing a purchase order, then please specifically reference this proposal number and date. Your purchase order will be an acceptance of our Agreement for Services and an authorization to proceed with the performance of our services. The terms and conditions included in any purchase order shall not apply, and are hereby specifically rejected, as our agreement is for services which are not compatible with purchase order agreements.

If you choose to accept this proposal by e-mail, your reply e-mail acceptance will serve as your representation to S&ME that you have reviewed the proposal and the associated Agreement for Services (AS-071) and hereby accept both as written.

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◆ **CLOSURE**

S&ME appreciates the opportunity to be of service to you. If you have any questions regarding the outlined scope of services, or if we may be of further assistance, please do not hesitate to contact us.

Sincerely,

S&ME, Inc.

Sarah Sinatra Gould, AICP
Placemaking Group Leader

Attachments:

Agreement for Services, AS-071

Attachment