

**Attachment A**  
**Scope of Services**  
**Quilcene Marina and Industrial Site**  
**Planning Services**  
**March 2, 2018**

**Task 1: Background Information Review and Site Visit:**

Assemble available base mapping, previous master plans, economic studies, and other documentation that will aid in accurately representing the current status of what is known about the study site and to describe and define relevant trends and overall opportunities. Primary sources will include the Port of Port Townsend (hereinafter "Port"), Team Jefferson, Jefferson County (hereinafter "County"), BST Associates, and Reid Middleton.

Perform a general site reconnaissance along with Port staff to include visual review of existing environment and natural site conditions, existing marina, utilities, buildings, and other site infrastructure, and observation of existing operations and activities.

**Task 2: Community Open House and Stakeholder Interviews:**

Confer with Port personnel on format and goals of stakeholder involvement process. Conduct an open-house style community meeting to solicit comments and input from the community and stakeholders. Conduct interviews via phone or on same day as the open house with existing and prospective tenants, community organizations, and other stakeholder organizations. We will coordinate with the Port to identify what information we hope to receive from the community stakeholders and tenants, who will take the lead in these forums, and who will be responsible for distilling findings from the meetings and interviews. This step will also include review of zoning, environmental, and other regulatory requirements that are applicable to the site and potential development strategies.

**Task 3: Market Assessment and Location Analysis:**

Perform a study of local and regional market trends to identify potential unmet demand and economic development opportunities for the facility.

- Document long-term trends and forecasts:
  - Population, size of the workforce, employment and unemployment rates, household income, employment by industry sector, and wages by industry sector, among others.
  - Economic development strategies (Target industries/uses etc.).
  - Identify potential opportunities at Quilcene.
- Review the site's location by summarizing overall characteristics and the site's overall adequacy to support potential development. In addition, provide a location analysis of other adequately served vacant industrial land.
- Brief assessment of the characteristics of the site based upon existing information (zoning, affect to the state or local transportation system, environmental restrictions, cultural resource review
- Identify how project site fits into overall county development

**Task 4: Distillation of interview findings/ Discussion with Port Staff:**

Review all site assessment, open house findings, interview responses, and market analysis. Meet with Port Staff to discuss visions, ideas, and perceptions regarding future development of the Quilcene Marina & Industrial Site in light of findings.

**Task 5: Draft Business Plan:**

Prepare a business plan that evaluates long-term trends and forecasts for the Quilcene Marina & Industrial Site. Define a market strategy that is linked to economic development and prepare a strategy for economic development that meets Port and community goals and objectives.

- Define potential markets linked to economic development:
  - Build on existing markets:
    - Coast Seafoods Company – expansion
    - Quilcene Marina – redevelopment (repair slips, dredging etc.)
    - Local/regional market opportunities (tourism, light industry et al)
  - Develop potential new markets:
    - Marine research
    - Other (to be determined)
- Identify Potential Alternatives:
  - Summarize up to three potential concepts for development to support existing and new markets
  - Identify potential phasing
  - Identify potential costs and funding
- Review of Infrastructure:
  - Provide approach for maintenance of existing infrastructure to support development
  - Identify infrastructure capital improvements required to support development
  - Prepare an order of magnitude opinion of probable construction costs for major maintenance and improvements to infrastructure
- Define strategy for market development:
  - Actions required by parties
  - Timelines

Deliverable will include a Draft Business Plan to the Port in PDF for review and discussion. The draft business plan report will summarize the results of the background review and site visit, stakeholder open house and interview results and market assessment. Detailed information from the site visit, stakeholder process, and market assessment will be included as appendices.

**Task 6: Draft Business Plan Discussion and Presentation:**

Discuss via telephone comments from the Port staff and commission on the draft business plan. Conduct a second open house or commission meeting session to present findings from meetings and interviews with community stakeholders and tenants as well as findings of the preliminary business plan to seek input and direction on preferred course for accommodating input in development of the final Business Plan.

**Task 7: Economic/Financial Impact Assessment:**

Prepare an economic impact assessment of the proposed project that meets the requirements of CERB:

- Total estimated jobs created (in FTEs).

- Describe benefits offered to employees.
- Describe the median hourly wage of the new jobs in relation to the median hourly county wage.
- The County three-year unemployment rate in relation to the state rate.
- County population change in the last five years.
- The estimated jobs created represent what percentage of the county’s labor force.
- The estimated jobs created represent what percentage of the county’s unemployed workers.
- Estimated new annual state and local revenue generated by the private business.

Prepare a financial plan for the proposed project that is sustainable and meets the requirements of CERB, Port and community:

- Evaluation of finance options
- Financial projections – revenues, expenses, net revenues associated with project
- Funding opportunities, including estimated private investment generated by project.
- Funding plan

**Task 8: Final Business Plan and Presentation at Port Commission:**

Prepare a Final Business Plan that refines the draft plan, includes the economic financial impact of the strategies, and incorporates comments and input from the draft plan review and commission meeting discussions. Prepare graphics and present the final plan at a Port Commission meeting.

Deliverable will include a final Business Plan in PDF format.

**Rates and Fee Estimate**

For services described in Tasks 1 through 8, Reid Middleton shall be paid on a “time-plus-expenses” basis using the rates indicated in the attached Attachment “B,” Schedule of Charges Effective July 1, 2017. We estimate the fee for this portion of the services to be \$67,000. The estimated fee for each of these tasks is as follows:

<b>Task Number</b>	<b>Description</b>	<b>Approx. Fee</b>
1	Background Information Review and Site Visit	\$7,830
2	Community Open House and Stakeholder Interviews	\$8,220
3	Market Assessment and Location Analysis	\$4,770
4	Discussion with Port Staff	\$2,660
5	Draft Business Plan	\$22,730
6	Draft Business Plan Discussion and Presentation	\$2,745
7	Economic/Financial Impact Assessment	\$11,370
8	Final Business Plan and Presentation	\$6,675
	<b>TOTAL</b>	<b>\$67,000</b>