

Heartlands Conservancy
29 E Main St.
Belleville, IL 62220
heartlandsconservancy.org



HEARTLANDS
CONSERVANCY

INVOICE

BILL TO

City of Lebanon
312 W. St. Louis Street
Lebanon, IL 62254

INVOICE # 2021-068

DATE 09/30/2021

DUE DATE 10/30/2021

TERMS Net 30

PROJECT NAME/NUMBER

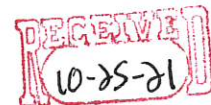
301055-Lebanon SE Quad

| DATE | DESCRIPTION | AMOUNT |
|------------|--|----------|
| 09/30/2021 | Task 1: Kick-off mtg., analysis of existing conditions, & neighborhood stakeholders - 80% complete Task 2: Neighborhood outreach & community engagement plan - 40% complete | 8,880.00 |

BALANCE DUE

\$8,880.00

MUT
31-00-532
SE Quad Plans



If you have questions concerning this invoice, email or call:
jamie.wheeler@heartlandsconservancy.org
618-566-4451x12

Professional Services Contract

For

Southeast Quad Neighborhood Plan

City of Lebanon, Illinois

This Professional Services Contract ("Contract") is made this 10TH Day of MARCH, 2021 by and between the City of Lebanon, St. Clair County, Illinois ("the City" or "the Client") and HeartLands Conservancy (Federal ID No. 37-1273869), ("HLC" or "Services Provider").

As provided in this contract, HeartLands Conservancy will provide professional services necessary to develop a neighborhood plan for the Southeast Quadrant (most of Ward 2) in the City of Lebanon, Illinois.

The City and Services Provider, for mutual consideration, the sufficiency of which is acknowledged, and under the terms and conditions hereinafter set forth, do agree as follows:

SECTION 1. SCOPE OF SERVICES TO BE PERFORMED

This contract will be fulfilled and completed by HLC and includes the tasks and deliverables listed below.

Task 1: Kick-Off, Analysis of Existing Conditions, & Neighborhood Stakeholders

(Concurrent with Tasks 2 & 3)

- 1.1 **Kick-Off Meeting.** As a kick-off to the project, HLC will meet with the Client Group (City and Neighborhood Advisory Committee Chairs) to refine the project schedule and key project milestones; complete a list of all information required; discuss the approach; and review the project mission; review the community engagement plan; and develop a list of key neighborhood stakeholders for interviews and/or to serve on the NAC (Neighborhood Advisory Committee).
- 1.2 **Analysis of the Existing Conditions and Trends** (local, regional, and national) that affect the project area. HLC will first collect and study demographic data, review existing plans and ordinances, conduct stakeholder interviews, and review a current land use map. The City will be responsible for providing GIS datasets, and other resources. If the city does have the GIS data, they may request them from St. Clair County and/or their past consultants.
- 1.3 **Field Surveys and visual tour** to verify the existing conditions and retrieve additional information about the neighborhood, as necessary. This information may include but is not limited to: existing building typologies and frontage types, street and sidewalk configurations, barriers to accessibility, viewsheds, study area character imagery, public realm elements, existing building height and typical bulk configurations, existing setbacks, building condition, building occupancy, building materiality, and building transparency.
- 1.4 **Existing Conditions Report** describes the results of this analysis. A draft of the report will be provided for Client Group feedback and the final report (to be included in the Draft/Final Neighborhood Plan) will be created after incorporation of comments. In addition to the above characteristics, the following conditions will be reviewed:

- **Land Use, Infrastructure (Utilities), and Parking Assessment.** Review of land use and infrastructure.
- **Roadway and Traffic Conditions Assessment.** Assess conditions of roadways and traffic circulation patterns and conditions.
- **Mobility Assessment.** Assess the current transit, pedestrian/walkability, and bicycle/trail infrastructure network, facilities, access, circulation, and connections.
- **Ecological and Cultural Asset/Challenges Identification.** Review ecological and cultural resources in the study area and larger regional context. Assessment will include tree canopy, quality of existing vegetation, floodplains, drainage, imperiled species, air and water quality, art, history, and sensory aspects.
- **Physical and Policy Barriers/Challenges Identification.** Examine ordinances, policies, processes, and physical barriers or challenges to implementation in the corridor.

TASK 1.0 Deliverables

- *List of Neighborhood Advisory Committee*
- *Kickoff Meeting & Materials*
- *Draft report of Existing Conditions*
- *Draft Presentation of Trends, Case Studies & Precedent Projects*
- *Summary of NAC members. Stakeholder interviews, and findings of review of existing reports, plans, and existing conditions.*

Task 2: Neighborhood Outreach & Community Engagement Plan

(Concurrent with Tasks 1 & 3)

After the initial data collection, HeatLands proposes a robust community engagement process consisting of a stakeholder committee (NAC), workshop, focus groups, interviews, walkabouts, open exhibit space, social media, and web/mobile device-based tools. Visualizing information and summarizing key trends and issues is a necessary and essential component of the work. As work products are developed and presented, they will be displayed in an exhibit space for public review. As the project progresses, presentations will also be made available to the neighborhood, City, media, online venues, and at the exhibit space. A significant part of HLC's approach is to build community capacity for implementation. One avenue for achieving this goal is through outreach and education. As such, an online community lecture series is included to help build capacity of city and neighborhood leaders and community members for successful outreach, planning and implementation. A list of these resources will be available at the library as well.

- 2.1 Community Kick-Off & Meetings.** HLC will kick off the community engagement process. Project Team meetings with key stakeholders via online. HLC will conduct walkabouts with city/community leaders, merchants, and other key stakeholders. An open neighborhood event will be held during this time, if possible. Meetings may be performed online, by phone, or in person when possible.

- **Meetings with Client Group.** Meetings and communications will occur frequently throughout the planning process with the City and Neighborhood Advisory Committee.
- **Neighborhood Advisory Committee (NAC).** A committee of neighborhood stakeholders will meet regularly throughout the planning process to provide initial visioning input and feedback.
- **Stakeholder Interviews & Meetings.** Throughout the planning process, HeartLands Conservancy will meet one-on-one with stakeholders and groups. These meetings will allow stakeholders to share information while maintaining privacy/anonymity.
- **Developers Forum.** Meet with regional and local developers to discuss their needs to participate in future development initiatives.

2.2 **Online Public Survey & engagement exercises** for neighborhood participation.

- **Develop an Online Public Survey.**
- **Lecture Series.** Lecture topics may include Planning and Design, Walkability and Street Design, Pollinators & Rain Gardens, Green Infrastructure, Place Ecology, etc. These lectures will be available to the public and are intended to help visioning and community plan preferences.
- **Website, Social Media, and Media Engagement.** HLC will work with local stakeholders and community groups to use social media to provide updates, meeting notices and encourage public participation in the project.
- **Pop-Up Information Tables at Events and Gatherings.** HeartLands Conservancy will provide information and solicit feedback at different community events when possible.
- **Exhibit Space.** HLC will locate and, with permission, set up a project exhibit space in the study area. This will allow the neighbors to view and comment on plan progress and concepts at any time. Updates will be posted on the website and social media.

2.3 **Neighborhood Advisory Committee and Planning Commission Workshop 1.** The first workshop (in person or via Zoom) will be to determine priorities for Lebanon and its neighborhoods. HLC will compile a presentation titled Here & Now. Here & Now summarizes existing conditions, census data trends, and findings. HLC will make this presentation via Zoom for maximum audience. This presentation will also be made available for input afterwards.

2.4 **Lebanon Neighborhood Public Workshop #1 - Visioning and Placemaking Identification.** This workshop will include a welcome and introductions, the summary of existing conditions, interactive exercises, and gathering input from the neighborhood on priorities, challenges, aspirations, and to develop a vision for the community. Results of this dialogue will be displayed in the exhibit space and used to inform the workshop and Planning and Design Framework in later tasks.

2.5 **Neighborhood Advisory Committee and Planning Commission Workshop 2.** HLC will present the draft plan to the Plan Commission (in person or via Zoom) for input and comment. Following Plan Commission feedback, HLC will make revisions to the draft plan. The revised draft plan will be made available online for the public to review and provide comment.

2.6 **Lebanon Neighborhood Public Workshop 2.** This task is centered on a public design workshop. This intense, multi-faceted approach to public involvement will allow neighbors to cooperatively develop a vision that serves as the foundation for the neighborhood's future and strategic decisions.

2.7 **Draft Neighborhood Plan Presentation & Options.** The last neighborhood plan workshop

will present the final draft plan to the community for feedback. The residents will be able to provide comments to maps, and graphics, whether online.

TASK 2.0 Deliverables

- *Lebanon Neighborhood Public Workshop #1 - Visioning and Placemaking Identification: materials & summary.*
- *Neighborhood Advisory Committee and Planning Commission Workshop 2: materials & summary.*
- *Lebanon Neighborhood Public Workshop 2: materials & summary.*
- *Web ready copy of draft Vision & Goals for public comment.*
- *Web ready copy of presentation that includes planning and design framework, draft options for focus areas and street sections for public comment.*
- *Public feedback Summary memo of Record*
- *Developers Forum Summary*
- *All materials to be available for an Exhibit at a site TBD.*

Task 3 – Vision, Goals, & Neighborhood Plan Document

(Concurrent with Tasks 1 & 2)

HLC has decades of experience developing vision statements, goals, objectives, and performance measures. Vision statements and goals need to be aspirational, yet understandable and usable. They should inspire change and excitement for the future. Performance measures, outcomes, targets, and strategies are more specific and actionable. HLC will prepare a concise and highly visual document, featuring the illustrations and renderings, engaging graphic design and infographics to present the neighborhood vision and plan recommendations. The plan will also include an implementation strategy that defines a clear direction of how and where development should occur over time and providing a specific plan for achieving immediate-, short- and long-term goals.

- 3.1 **Create Vision, Goals, and Objectives.** HLC, in coordination with the neighborhood will develop and clarify the project vision, goals, and objectives. This task will be based on existing conditions analysis and community input.
- 3.2 **Planning & Design Framework.** HLC and NAC will develop a framework to guide the plan.
- 3.3 **Development of Draft Options.** Based on previous input, HLC will develop preliminary conceptual alternatives while on site. Based on a developed framework, these design options will address the physical, operational, policy, and technological aspects defined through the planning process. These options will also address and reflect community input regarding qualitative concepts.
- 3.4 **Revised Neighborhood Plan.** The update will include maps depicting the future land use and other relevant information/data from the revised draft plan. Public comments will be collected and answered by HLC, NAC, and the city. HLC will work with the media and city website to post a draft plan summary for comment.

3.5 **Post-Workshop Refinement.** The compact format of the public workshop process described above is designed to make major advances towards the creation of the Neighborhood Plan. During this process HLC will collect public feedback, record the decisions made during the process, and clarify which option is selected as the preferred plan option. After the presentation and the end of the public design workshop, HLC will refine the plans, visualizations and other work products based on feedback received from the community and stakeholders.

3.6 **Develop Detailed Plan: Draft & Final Document.** HLC will compile the revised draft plan based on input received by Lebanon City staff, residents, and stakeholders. Submit the final Neighborhood Plan Document based upon revisions and input. The detailed plan document will include:

- *Vision, Goals, & Strategies*
- *Community Engagement & Public Input results;*
- Existing conditions report;
- Vision, goals, and objectives identified by the community;
- Illustrative Neighborhood Plan;
- Phased implementation (Early action items to long term)and
- Funding strategies and policy management recommendations; and
- Potential Partnerships to continue forward momentum of plan implementation.

TASK 3.0 Deliverables

- *Draft Vision & Goals for public comment.*
- *Presentation that includes planning and design framework, draft options for focus areas and street sections for public comment.*
- *Draft Neighborhood Plan Document*
- *Final Neighborhood Plan Document:*

The detailed plan document will include work products to date and:

- *Vision, Goals, & Strategies*
- *Community Engagement & Public Input results;*
- *Final Existing Conditions Report;*
- *Vision, goals, and objectives identified by the community;*
- *Illustrative Neighborhood Plan;*
- *Phased implementation (Early action items to long term)*
- *Funding Strategies and Policy management recommendations; and*

- *Potential Partnerships to continue forward momentum of plan implementation.*

SECTION 2. PROJECT SCHEDULE

The City and Services Provider agree that the final schedule will be confirmed by the Service Provider after notice to proceed. Overall project schedule shall not extend past April 1, 2022. The expedient schedule does take into consideration time for reviews, weather delays, and holidays. The efficiency of the schedule relies heavily on the Client to review deliverables and provide feedback and comments quickly to HLC. See Attachment B for proposed detailed project schedule.

The tasks and deliverables to complete this plan effectively are listed above grouped by Analysis, Public Outreach and developing the Plan through Vision to Final Neighborhood Plan. The schedule outlines these tasks in a step-by-step process. The final schedule will be confirmed after notice to proceed. Overall project schedule shall not extend past approximately 11 months. For a proposed detailed schedule, refer to Attachment B. The timeline of project milestones are listed. Deliverables are in ***BOLD in the schedule and below each Task Sections 1, 2 and 3.***

SECTION 3. PROJECT TEAM

The project team includes, but is not limited to, the following:

Mary Vandevord, AICP, President and Chief Executive Officer

Laura Lyon, Director of Strategic Initiatives

Sarah Vogt, Conservation Manager

Tyler Burk, Watershed Planning

Katie Siech, Environmental Programs Association

SECTION 4. COMPENSATION

This Professional Services Contract is entered into a lump sum for all Tasks **for a total not to exceed amount of \$18,500.00.** which will be paid by the City to the Services Provider. The total includes all reimbursable expenses related to only tasks listed above. Any additional services requested, changes in scope or deliverables, or schedule shall be agreed to in writing by both the City and Services Provider. The City agrees to pay the Services Provider **monthly based on the percentage of the tasks completed** of the agreed project costs within thirty (30) days of the invoice.

SECTION 5. METHOD OF PAYMENT

a. HeartLands Conservancy will invoice the City according to the following schedule:

- By Task 1 completion: 40% of total fee as \$7,400.00 will have been billed
- By Task 2 completion: 40% of total fee as \$7,400.00 will have been billed
- By Task 3 completion: 20% of total fee as \$3,700 will have been billed
- Any Additional services requested by the City (see attachment A) are based on hours billed. This may be included in the Task 3 invoice or as a separate invoice.

b. Invoices are due and payable within thirty (30) days of receipt.

or at such other address as either party may specify, in writing, from time to time.

SECTION 10. INDEPENDENT CORPORATION

It is expressly agreed that the Services Provider is acting as an independent corporation with regard to the activities and services specified herein. The City shall carry no workers' compensation insurance, health or accident insurance to cover the Services Provider for any type of loss which might result to the Services Provider in connection with the performance of the activities and services set forth in this Agreement. The City shall not pay any contribution to Social Security, unemployment insurance, federal or state withholdings taxes, not provide any other contributions or benefits which might otherwise be expected in an employer-employee relationship, it being specifically agreed that Services Provider is not an employee of the City.

SECTION 11. TERMS AND CONDITIONS

- A. The City and HeartLands Conservancy each bind itself and its successors to this Contract. Neither the City nor HeartLands Conservancy shall assign or transfer its interest in this Contract without the written consent of the other.
- B. This Professional Services Contract constitutes the entire agreement between the parties with respect to the subject hereof and neither has been induced to make or enter into this Contract by reason of any oral or written agreement or representation other than as contained herein.
- C. This Professional Services Contract may be modified or changed only by a written amendment that is signed by both the City and HeartLands Conservancy.
- D. The laws of the State of Illinois shall govern the interpretation and enforcement of this Professional Services Contract.
- E. Any individual who signs this Professional Services Contract on behalf of the City or HeartLands Conservancy, represents, promises, and guarantees, that he or she is fully authorized to execute this Contract on behalf of his, or her employer or company.
- F. In any court proceeding or other action brought by one party hereto against the other to enforce or interpret the terms of this Contract or to resolve any dispute concerning any of the services, the party prevailing in such proceeding or action will be entitled, in addition to such other relief the court may grant, to an award of its costs incurred in connection with the proceedings or actions, including, but not limited to, reasonable attorney fees, court costs, and expenses.

In witness whereof, the parties hereto have caused this Contract for Professional Services to be executed as of the day and year first above written.

Rich Wilken 03/10/2021

Mayor Rich Wilken, Mayor City of Lebanon, Illinois

Date

Mary Vandevord 3-10-2021

Mary Vandevord, AICP President & CEO, HeartLands Conservancy

Date

Attachment A

ADDITIONAL OPTIONAL SERVICES

In addition to the scope of work in the contract, the following (optional) professional services can be provided to the City of Lebanon, if requested in writing and compensated per the rates listed below.:

1. Additional Project Team Meetings/Presentations
2. Additional Project Plan Review
3. Gateway/Entrance Design
4. Additional Public Presentations
5. Detailed Design Development of Planned Area or Focus Areas
6. Writing and Review of RFQ/RFPs for Identified Districts/Developments
7. Additional Renderings
8. Implementation Plan, Schedule, and Assistance
9. Detailed Neighborhood Connectors Plan
10. Additional Trail Planning
11. Initial Engineering
12. Master Plan of Future Areas
13. Detailed Planning Schedules and Plans
14. Detailed Construction Drawings
15. Marketing Brochures and Documents
16. Detailed Implementation Plan
17. Funding or Grant Image Development
18. Detailed Interpretation/Way-finding Signage Plan
19. Detailed Cost Estimates
20. Grant Writing
21. Land Conservation Easements
22. Green Infrastructure Planning
23. Additional Document Prints

Hourly Rates:

Mary Vandevord, AICP President & CEO \$92.00 per hour

Laura Lyon, Dir of Strategic Initiatives \$82.00 per hour

Sarah Vogt, Conservation Manager \$72.00 per hour

Tyler Burk, Watershed\Green Infrastructure Planning \$71.00 per hour

Katie Siech, Environmental Programs Associate \$65 .00 per hour

Attachment B

PROJECT SCHEDULE & INFORMATION REQUEST

The following schedule is set forth as an estimation of the project schedule. The schedule will rely on an expedient review process by the Stakeholders, Neighborhood Advisory Committee, City and Staff, as well as the public. Holidays will be considered throughout the schedule. HLC and City communications will occur throughout the process to ensure project development and progress. Overall project schedule shall not extend past April 1, 2022. Please see Section 2 of this contract for further detail.

- Month 1|2*** **Project Kick-off**
Social Media, Web links, & Media Links go live
Data Collection and GIS files received
Formation of Neighborhood Advisory Committee (NAC) with Chairs
Review of Existing Plans/Ordinances
Initial Public Survey
Workshop with Planning Commission & NAC:
Draft Presentation of Trends, Case Studies & Precedent Projects
Stakeholder Interviews & Summary of Findings
Summary of NAC members. Stakeholder interviews, and findings of review of existing reports, plans, and existing conditions.
**Hold for Client Comment*
- Month 3*** **Existing Conditions Report** to Planning Commission
Neighborhood Workshop:
Presentation of Trends, Case Studies & Precedent Projects
Public Survey Results
Interactive Exhibit & Results Updates
**Hold for Client Comment*
- Month 4|5*** Develop Vision, Goals, & Objectives
Present final Vision, Goals, & Objectives
Development of Draft Neighborhood Plan
Interactive Exhibit Updates Ongoing
**Hold for Client Comment*
- Month 6*** Development of Revised Draft Neighborhood Plan and Maps
Priority Recommendations and Future Land Use Options
Planning Commission & NAC Presentation/Discussion
Interactive Exhibit Updates Ongoing
**Hold for Client Comment*
- Month 7|8*** **Final Draft Neighborhood Plan**
**Hold for Client Comment*
Planning Commission Presentation & Recommendation to Council
**Hold for Client Comment*
Final Neighborhood Plan

HLC INFORMATION REQUEST

HeartLands Conservancy requests the following materials, if available, from the City in order to begin studying and reviewing data for the neighborhood planning process:

- Demographic data and projections, including those compiled by EDR during the TIF development process and latest census if different from the 2010 census.
- Traffic counts for US 50 and Route 4 with the City grid
- Building permits for the last 20 years (preferably) or at least 10 years by type and year
- Digital files (word or pdf of current plans, current and past comprehensive plans, park plans, economic development plans or districts, neighborhood or streetscape studies/plans, and any other projects or proposed/planned projects, and ordinances in the City of Lebanon.)
- GIS datasets for the City and its planning extents to include:
 - Geo-referenced layers depicting boundaries, city ROWs, parcels, utilities, public lands, street/blocks, districts, etc; and
 - Most current land use map.
- Zoning Ordinances, special districts, or enterprise/other zones.
- Providing a list of key community stakeholders to include in the interviews.
- List of Planning Commission, Committee members, and City Council Members and contact information (email and phone numbers)
- List of potential outdoor events for May through December that may be used to gain further public input.
- Contact information or introduction to local reporters to discuss future press releases or articles.