

**CITY OF LEWISVILLE
VISION 2035 PLAN
SCOPE OF SERVICES AND RESPONSIBILITIES OF CLIENT**

ARTICLE I

BASIC SERVICES: Freese and Nichols, Inc. (FNI) shall render the following professional services to the **City of Lewisville (Client)** in connection with the development of the Vision 2035 Plan.

PROJECT UNDERSTANDING

The City of Lewisville (City) has engaged Freese and Nichols (FNI) to prepare a Comprehensive Plan consistent with state and national best practices. This includes facilitation of stakeholder engagement and community input in support of the creation of a community vision and a Vision Plan that includes strategies and recommendations related to housing, land use, and other focus areas identified by the community. This understanding is operationalized in the scope of services provided below.

SCOPE OF SERVICES

Tasks prepared as part of this planning effort may occur concurrently or sequentially where appropriate, or in some cases may deviate from the sequence shown in this Scope of Services document. The result will be a professional plan document containing all the information described in the tasks below. For the purposes of plan organization/readability, aspects of each task may be shifted into different chapters or appendices as appropriate.

This document also contains the scope of work for subconsultant, Rayo Planning.

PROJECT ASSUMPTIONS:

1. The City will appoint a contact person to work with FNI and to act as an intermediary between the consultant, city, county and state government staff persons, and stakeholders as required. FNI will take primary direction related to the process and deliverables from this City-appointed contact person.
2. The City will coordinate project contacts, meetings and the transfer of necessary information from the City and other organizations/entities to FNI as necessary for this effort.
3. The City will coordinate arrangements for locations, setup, refreshments, and notifications and advertising for all stakeholders, focus group and community outreach events. FNI will assist with the creation of outreach materials to be used in advertising.
4. The City will provide information from all previous and current studies and projects (as available) that may affect the outcome of this plan. This information will be provided in digital format when possible and available. A list of previous and current studies and projects will be discussed at the project kickoff meeting.
5. The City will provide FNI with the most recently updated digital base map and aerial imagery of the planning area for use during the plan preparation process. These files will be in the form of GIS file types native to ESRI ArcGIS, as available.

6. Tasks prepared as part of this planning effort may occur concurrently or sequentially where appropriate, or in some cases may deviate from the sequence shown in this Scope of Services document and as determined by the project workplan or schedule.
7. This scope identifies a specific number of meetings. Any addition to that number of meetings will be considered a change in scope and may increase the project cost from the noted fee.
8. Upon conclusion of the project, all deliverables from FNI will be provided electronically in the native format in which they were prepared as well as PDF format.
9. The plan will be prepared using Adobe InDesign, unless otherwise agreed upon at the outset of the project.
10. All the mapping created by the Consultant will be prepared using ESRI's ArcGIS software and other necessary rendering software.

SCOPE OF SERVICES:

Project Management and Quality Control

FNI will perform general project management, communications and quality assurance throughout the project to control project quality, timeline and budget for the scoped period of completion.

Task 1: Public Involvement & Community Outreach

Public involvement and community outreach tasks will be completed throughout Work Phases 1-6 as outlined in the project schedule agreed upon by all parties during Work Phase 1.

Task 1a: Public Involvement Plan

- After the Initiation Meeting, FNI will attend two (2) additional virtual meetings with the City to refine and finalize the Public Involvement Plan. FNI will assist the City to develop a Public Involvement Plan to outline goals, target groups, vehicles for communications, schedule, meetings, and provide brand assistance. Engagement and outreach will happen throughout all project work phases. The City will be responsible for identifying key stakeholders and organizing committee members.

Task 1b: Project Website

- FNI will create and maintain a public facing website or GIS Storymap specifically for this project to serve as a one stop shop for project information, posting of public documents and videos, and host online engagements, such as a comment pin map. Upon completion of the project, the City will be responsible for hosting any information they wish to carry forward past project completion.
- If the City determines that they want to use a third party for website creation and hosting, FNI will work with that team and provide website updates and materials as required.

Task 1c: Public Survey

- FNI will develop an online survey to poll residents on questions relevant to the Plan as agreed to by the City. FNI will generate and host an online community survey on the project website. FNI will work with the City to develop the survey questions considering appropriate participation length and applicability of the questions to the project work. The survey questions will attempt to identify the community's vision, issues, opportunities, needs, key desires, and preferred priorities from the community.
- FNI will provide a survey link to the City, and the City will be responsible for promoting the

survey through a variety of channels including the City website and social media.

- This does not include a statistically valid survey, if desired, an outside survey firm could be brought in for an additional cost.

Task 1d: Steering Committee and Sub-Committees (in person, 10)

- A Vision 2025 Steering Committee will be established by the City to guide the creation of the Vision 2035 Plan. This body will break into multiple sub committees or working groups that will be involved in neighborhood outreach activities and public workshops as well as meet to explore, direct and confirm strategies and recommendations. The FNI team will attend and facilitate up to ten (10) meetings with the Steering Committee and sub-committees. The City will be responsible for identifying and organizing Committee members, contacting and coordinating Committee participants, and providing meeting facilities. Beyond the 10 meetings noted for the consultant team, City staff will assist with supporting the work of the sub-committees.

Task1e: Neighborhood Outreach

- Neighborhood Outreach will be a joint effort between FNI, Rayo Planning and City staff. Community outreach events will be conducted throughout the process to allow residents to respond to draft deliverables and provide input and feedback that influence the outcomes and recommendations of the Plan.
- Potential outreach and engagement events will be outlined and agreed upon in the Public Involvement Plan, but these may include activities with community organizations, boards and commissions, LISD and others. To remain flexible and agile throughout the neighborhood outreach process, this scope is considered flexible and subject to change, so long as the effort is agreed upon by all parties and remains within the allocated budget amount for community outreach.
- The subconsultant, Rayo Planning, will complete their work under this task (see below for their scope of work).

Task1f: Community Town Halls (in person, 4)

- During the work phases outlined below in Tasks 4-7, a community town hall event will take place to allow opportunities for the community to come together, discuss and deliberate the Big Issues, Big Moves, Big Ideas, and Big Achievement.

Task 2: City and Client Meetings

City and client meeting tasks will be completed throughout Work Phases 1-6 as outlined in the project schedule agreed upon by all parties during Work Phase 1.

Task 2a: Bi-weekly Progress Meetings (virtual, 39)

- FNI will facilitate bi-weekly meetings with the City staff team to discuss progress, process and project needs.

Task 2b: Kickoff Meeting (in person, 1)

- The Consultant will attend one kick-off meeting with the City. Following, the Consultant and the City will participate in a site tour of key areas in Lewisville.

Task 2c: Council Briefings (in person, 2)

- FNI will attend two City Council meetings during the process to provide a briefing related to project updates and progress as well as seek feedback from Councilmembers.

Task 2d: Adoption Meetings and Events (in person, up to 4)

- FNI will attend one (1) meeting for the presentation, consideration and recommendation of the Plan by Planning & Zoning Commission
- FNI will attend up to two (2) meetings for the presentation, consideration and adoption of the Plan by City Council.
- Following the Vision 2035 Plan's adoption, the Consultant will attend one (1) conclusion meeting which may be in conjunction with a City event or celebration.

Task 3: Work Phase 1 // Project Initiation

Task 3a: Project Setup

- FNI and their subconsultants will generate/refine a project workplan and schedule, deliverables and document outline, and Public Involvement Plan.

Task 3b: Initiation Meeting (virtual)

- FNI will facilitate a project initiation conference call with City staff. The purpose of the meeting will be to review the project setup items noted in Task 3a and discuss other necessary expectations and protocols for all parties to be aware of at the outset of the project, including projects scope, schedule, communication, expectations, deliverables, and City and Consultant tasks.
- Additionally, this meeting will discuss FNI's preliminary understanding of the City's needs and any other existing plans and facilities or key information FNI should be aware of.

Task 3c: Data Request

- FNI will generate a data request for the City to begin gathering and providing the necessary information to conduct the project.

Task 3d: Document Template and Layout

- FNI will create a document template for the Plan. The plan template will utilize logos, colors, fonts, and other branding standards provided by the City, as the basis for the Plan template.

Task 4: Work Phase 2 // BIG ISSUES

Task 4a: Context Analysis

- The Consultant will review, analyze and document existing conditions in Lewisville. This includes review of earlier plans and studies provided by the City, with emphasis placed on the most recent plans and those found most relevant by the City.

Task 4b: Baseline Analysis

- Other existing conditions to be reviewed may include but not limited to global trends, national trends, regional trends, history, economics, demographics, historic population and growth trends, existing land uses, municipal boundaries and regulatory controls, and physical features for Lewisville in the region.

Task 5: Work Phase 3 // BIG IDEAS

Task 5a: Draft Vision and Guiding Principles

- FNI will develop a vision statement and 3-5 guiding principles based on an assessment of City feedback regarding goals and vision, an understanding of existing community constraints, and a summary of public input and feedback that led to the creation of the guiding principles.

Task 5b: Future Scenario Planning

- FNI will facilitate exploratory scenario planning, using the Big Issues that are causing challenges in the present as well as identifying future driving forces of change and additional issues that may arise. These issues and changes will be translated into futures, or scenarios, for the City. A preferred future or scenario can then be identified by the community that the City should be working towards.

Task 5c: Identification of Big Ideas

- Once a preferred future is identified, responses or Big Ideas can be discussed and identified that address issues or contribute to the realization of the preferred future scenario.

Task 6: Work Phase 4 // BIG MOVES

Task 6a: Identification of Big Moves

- FNI, along with the City and Community, will explore solutions to address the Big Ideas from Task 5, which will become the Big Moves.

Task 6b: Recommendations

- FNI will fill out objectives, strategies and necessary background details or data so support each Big Move.
- A generalized Land Use Plan will be developed in partnership with the City's Planning Director to support their day-to-day work needs.

Task 7: Work Phase 5 // BIG ACHIEVEMENT

Task 7a: Implementation Plan

- Based on community and City staff feedback, strategies and action items from the Big Moves will be summarized into an implementation action plan. The action plan will be provided in a matrix format including applicable implementation techniques (such as regulatory actions, programs, and intergovernmental partnerships) and prioritization with appropriate time periods.

Task 8: Work Phase 6 // Adoption & Finalization

Task 8a: Executive Summary

- FNI will generate an Executive Summary that can easily be translated into multiple languages.

Task 8b: Draft Plan

- FNI will update the draft document based on feedback received up to this point, both from the community and client, and will compile a **full draft plan** for review by City staff, including the

Executive Summary and appendices.

- FNI will undertake one round of revisions to the draft plan based on staff comments, the client shall provide consolidated comments using a comment log provided by FNI. This will then serve as the **final draft plan** for adoption consideration.

Task 8c: Finalization of Deliverables

- After the first Council adoption meeting, the Client will provide consolidated final comments using a comment log provided by FNI.
- FNI will revise the plan and provide a **final document**. At this point, it is assumed that the plan adoption is on consent for a second City Council reading, if required.
- FNI will provide the City with the following deliverables:
 - Digital PDF version of the final plan document, which can be used in a variety of ways by the city, including web and print.
 - Digital download link containing all working electronic files for the report, including the packaged InDesign files, digital versions of all charts, tables, maps, graphics, etc, GIS shape files, and other electronic data developed during the planning process.

TIME OF COMPLETION:

FNI is authorized to commence work on the Project upon execution of the contract agreement and will complete the services within **18 months** from notice to proceed.

If FNI's services are delayed through no fault of FNI, FNI shall be entitled to adjust the contract schedule consistent with the number of days of delay. These delays may include but are not limited to delays in Client reviews, delays on the flow of information to be provided to FNI, delays in scheduling engagements, stakeholder focus groups and adoption meetings, etc. These delays, if significant, may result in an adjustment to compensation as outlined in this contract agreement.

COMPENSATION:

FNI shall perform professional services as outlined in the "Scope of Services" for a **lump sum fee of \$537,500**. All project and subconsultant expenses are included.

ADDITIONAL SERVICES:

Additional Services that could be performed by FNI to support this effort, which are not included in the above-described basic services or fee, are outlined below. These additional services would require additional fee and may impact project schedule and therefore require additional Client approvals and contract amendments to be executed, if desired.

- **Additional Meetings and Engagement**

Additional in person or virtual meetings beyond those described above, including meeting preparation, materials, expenses and meeting facilitation.

- **Economic Development and Market Analysis**

Tasks related to trade areas, socioeconomic and market data and economic indicators or economic development beyond typical planning level economic discussions.

DESIGNATED REPRESENTATIVES: FNI and Client designate the following representatives:

Client's Designated Representative – Richard E. Luedke, AICP
Planning Director
P.O. Box 299002
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Client's Accounting Representative – David Erb
Director of Finance
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FNI's Designated Representative – Wendy Bonneau, FAICP
12770 Merit Dr., Suite 900 Dallas, Texas 75251
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FNI's Accounting Representative – Stephanie Kirchstein
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Proposal for a Latine/Hispanic Outreach and Engagement Plan: *Somos Lewisville*

Overview

The “Somos Lewisville” (We Are Lewisville) is a comprehensive outreach and engagement plan designed to foster trust, build relationships, and promote inclusive participation in city programs, services, and initiatives. This effort can complement the City’s efforts to update its Vision Plan.

Targeted Approach

In the City of Lewisville, there are five Census Tracts with a predominant Latine/Hispanic population: 216.19, 216.45, 217.39, 217.44, 217.45 (ACS 2023 5-Year Estimates). The following plan prioritizes engaging within and near these Census Tracts.

Objectives

1. **Increase Awareness:** Ensure the Latine/Hispanic community is informed about city resources, events, and opportunities.
2. **Build Trust:** Establish meaningful connections and pathways of communication through culturally competent outreach and engagement.
3. **Enhance Participation:** Strengthen the Latine/Hispanic community to actively engage in civic processes such as: town halls, committees, and planning efforts.
4. **Develop Partnerships:** Collaborate with local organizations, businesses, and leaders within the Latine/Hispanic community to amplify outreach efforts.

Expected Outcomes

1. Improved communication and understanding between the city and Latine/Hispanic stakeholders, defined as, but not limited to, residents, business owners, religious leaders, and others.
2. Increased feedback and participation from Latine/Hispanic stakeholders.
3. Enhanced sense of belonging and representation among Latine/Hispanic stakeholders.
4. Collect data (quantitative and qualitative) to inform the city’s programs, services and initiatives.

Timeline

Phase 1 (Months 1-2)

- Participate in bi-weekly progress calls
- Gather data and information pertinent to the targeted area
- Learn about the city’s policies and practices
- Confirm the project work plan and schedule
- Project initiation meeting
- Kickoff meeting & city tour

Phase 2 (Months 3-4): Establishing Connections

- Prioritize establishing community touchpoints by sharing general city resources, raising awareness of the Vision Plan, FNI’s vision survey and emphasizing the importance of participation.



- Create a stakeholder survey for the one-on-one meetings and utilize the collected preliminary data to help inform the general survey for Phase 2 design by FNI.
- Maintain a database to track stakeholder touchpoints, contact information, and leads, ensuring consistent engagement and outreach efforts.
- Meet with and schedule one-on-one meetings with property managers, school principals, local business owners, church leaders, and other relevant stakeholders identified during this phase.
- Initial Stakeholder List:
 - Property managers: Barrow Apartments, Oaks of Lewisville Apartments, Northwood Manufactured Home Community, Highland Acres mobile homes, and Eagle Ridge mobile homes.
 - Schools: Lakeland Elementary School
 - Local businesses: Street Dreams Llantera, Camarillos Tire Shop, Antonio's Auto Repair, Fiesta Mart, Michoacana Meat Market, Los Alisos Mexican Restaurant, and Taqueria la Calendaria.
 - Religious institutions: Iglesia Bautista Fundamental and Our Lady of Lebanon Catholic church.
- Begin recruiting Vecinos ("neighbors")—a volunteer program offering opportunities to develop leadership skills and receive relevant training to help steward this plan. This initiative will involve curating a leadership curriculum to develop this program. City staff will be invited to participate and will receive training to continue with the program, if desired.

Phases 2/3 (Months 5-6): Start Developing Grassroots Groups (soft launch)

- To build rapport and familiarity, consistent visibility is essential. Begin tabling at schools, grocery stores, churches, and apartment complexes/mobile home communities. These tabling events will serve as the launch for the survey mentioned in Phase 2 by the FNI team, while also sharing general city resources, spreading awareness of city events, and incorporating fun activities. Volunteers and/or Vecinos recruited in Phase 1 will also be invited to participate, ideally those who have a vested interest in the areas where we are tabling (e.g., tenants).
- Towards the end of Phase 2, host the first listening session for each relevant stakeholder group identified in Phase 1. The goal is for these sessions to help identify core group members who will form a grassroots group. For example, one convening will focus on automotive businesses, where we'll hear directly from them and invite a leader from the [Automotive Association of Oak Cliff \(AAOC\)](#) to serve as their advisor.
- Strategize with the Vecinos on relevant city-wide events to increase Latine/Hispanic engagement.

Phases 4/5/6 (Months 7-18): Community-wide Events & Formalizing Grassroots Groups

- Launch 2-3 community-wide events with guidance from the Vecinos and other relevant stakeholders. Some initial ideas include plaza parties at commercial hubs, such as the Michoacana Meat Market location, co-hosted events at churches and schools, 'A Day of Latin America in Lewisville,' and block party events. These events will serve as an alternative way to host listening sessions and gather community input.
- Convene monthly with each grassroots group to learn about their unique vision, needs, goals, and aspirations. Introduce the concept of formalizing the group to establish



communication, local influence, and visibility. Each month's meeting will follow the focus area from FNI's scope i.e., Big Moves.

- At the conclusion of the Vision Plan update, host a graduation celebration for the Vecinos.

Conclusion

This plan will position the City of Lewisville as a leader in innovative engagement and outreach while strengthening its relationship with the Latine/Hispanic community. By investing in these initiatives, the city ensures all residents feel valued and strengthened to contribute to the community's growth.