

Scope of Services to Update Downtown Design Standards and Guidelines San Marcos, Texas



Approach for San Marcos

This assignment is to update design standards and guidelines for downtown San Marcos. The focus will be on design variables that were addressed by Winter & Company in a previous project for the city. Recent developments have raised questions about the degree to which new, larger buildings fit with the traditional scale and character of downtown. There also are concerns that the different sub-areas in downtown may need more refined guidance for compatible development. Initially, we understand these to be the key topics:

- Ways in which to vary massing of larger building such that they will be more compatible with the traditional scale of downtown
- Ways in which to provide variety in articulation of facades such they appear to be more in scale with design traditions
- Treatment of building materials that will be in character with downtown
- Treatment of street level design to provide a sense of scale and activate the public realm
- Ways in which to provide transitions from higher density zones to abutting sensitive edges

Tailoring to context

We will revisit the vision for the individual sub-areas that are identified in the design guidelines. Working with the community, we will draft more detailed vision statements for these contexts. These will serve as the base for updating the standards and guidelines and also can be used in the future as a starting point for updates to the comprehensive plan and downtown plan.

New standards

We will explore opportunities for providing new, prescriptive standards to address the design issues. At the same time, we will consider how new, discretionary guidelines may be crafted to work in concert with the revised standards. In both cases, we will strive to provide clarity and predictability in the standards and guidelines while also offering flexibility in meeting their intent.



Noré Winter conducting a community workshop.

New graphics

New illustrations will be developed to more clearly illustrate the standards and guidelines. Computer-generated illustrations will be designed to match the illustrations in the current code. Photographs of real, built examples will also be included.

We will draft the standards and guidelines as a stand-alone document for public review and adoption, such that the public can understand the changes that are proposed. They will be formatted such that they can easily be inserted into the land development code after adoption.

Outreach

A key part of developing design standards and guidelines is to involve major stakeholders as well as the general public. The Outreach has several levels:

Community Workshops/Open House

These are designed to engage the greatest numbers of people and to highlight a diversity of ideas. They are interactive and help build consensus.

Focus/Stakeholder Groups

These appeal to special stakeholders who wish to participate in more specific discussions about matters of interest to them. In these sessions, special concerns are addressed and information related to specific issues is collected. These often include Downtown business leaders and historic preservation players.

We will conduct a series of focus/stakeholder groups and community workshops, which will include exercises that are designed to actively engage participants in this update.

Scope of Services

Step 1. Set the Stage

In this step, we will help build an understanding of existing conditions in downtown San Marcos. We will evaluate the existing code for downtown, generate alternative computer models and hold a public workshop.

Tasks:

1.1 Review existing conditions

- Review current building trends
- Review existing code for downtown
- Review Design Manual as it relates to downtown

1.2 Conduct start-up strategy call with staff

- Discuss issues and objectives
- Discuss project logistics and schedule

1.3 Generate alternative models

- The models will illustrate variations in massing and articulation techniques that may be amendments to the code.

1.4 Orientation session with staff (Trip 1)

- Review itinerary and final logistics.

1.5 Conduct Workshop #1 (Trip 1)

- Introduce the project
- Present models illustrating design variables (i.e., massing, articulation, street level character)
- Discuss a vision for the character areas (including transitions to sensitive edges)
- Conduct exercises in which participants can apply the variables to the different contexts

1.6 Joint meeting with the CC and P&Z (Trip 1)

1.7 Conduct three (3) focus/stakeholder groups (Trip 1)

- Historic Preservation Commission/Heritage Association
- Property Owners
- Downtown Association/Main Street

Step 2. Develop the Strategy

In this step we will work with the downtown to refine a vision for the area and its sub-areas, with respect to design. We will use the new computer models to test the benefits of other potential design standards and guidelines and determine the best approach for addressing the findings from Step 1.

Tasks:

2.1 Refine the vision for downtown and its sub-areas.

- Fine tune vision based on feedback from staff and the community workshop

2.2 Outline potential new design standards.

- Build from the new models and apply specific dimensional standards.

2.3 Outline potential new design guidelines.

2.4 Discuss with the client in a conference call.



Participants chart preferred scenarios in a Greenville, South Carolina workshop.

Step 3. Develop the Design Standards and Guidelines

Tasks:

3.1 Develop draft #1 of the design standards and guidelines.

3.2 Review with the client via conference call.

3.3 Develop draft #2 of the design standards and guidelines.

- Edit Draft #1 based on consolidated comments received from staff

3.4 Work session with staff (Trip 2)

- Review on-site logistics; discuss next steps.

3.5 Present draft #2 of design standards and guidelines in Workshop #2. (Trip 2)

- Present draft materials and collect comments.

3.6 Joint work session with the CC and P&Z. (Trip 2)

- Present draft materials and collect comments.

3.7 Develop final draft of design standards and guidelines.

- Edit Draft #2 based on consolidated comments received from staff

Step 4. Adoption

4.1 Prepare Powerpoint presentation

4.2 Present final Design Standards and Design Guidelines to Planning Commission. (Trip 3)

4.3 Present final Design Standards and Design Guidelines to City Council. (Trip 4)

Proposed Timeline

January 2020	Negotiate contract
February 2020	Gather information, finalize schedules
April 2020	Hold first public meetings, develop models (Trip 1)
May 2020	Refine vision and develop outlines for new design standards & guidelines
June-July 2020	Develop draft #1 of design standards & guidelines
August-Sept 2020	Develop draft #2 of design standards & guidelines
September 2020	Hold second public workshop and meetings (Trip 2)
October 2020	Develop final draft of design standards & guidelines
November 2020	Prepare Powerpoint presentation for adoption hearings
TBD	Present final design standards and guidelines to Planning Commission (Trip 3)
TBD	Present final design standards and guidelines to City Council for adoption (Trip 4)

Cost of Services

BUDGET

8-Nov-19

Step 1: Set the Stage

1.1 Review existing conditions.					
1.2 Conduct start-up strategy call with staff					
1.3 Generate alternative models					
1.4 On-site orientation session with staff (Trip 1)					
1.5 Conduct Workshop #1 (Trip 1)					
1.6 Joint meeting with CC and P&Z (Trip 1)					
1.7 Conduct focus/stakeholder groups (Trip 1)					
In-house fees					
Personnel	Rate	Hours	Amount	Subtotal	
N. Winter	\$190	12	\$2,280		
J. Husband	\$130	24	\$3,120		
Graphics/admin	\$70	32	\$2,240		
Total In-house Fees					\$7,640
On-site fees (2 people, 2 nights)					
Personnel	Rate	Hours	Amount	Subtotal	
N. Winter	\$190	24	\$4,560		
J. Husband	\$130	24	\$3,120		
Total On-site Fees					\$7,680
Expenses	Cost	Quantity	Amount	Subtotal	
Airfare	\$400	2	\$800		
Surface transit, Parking	\$100	3	\$300		
Car rental	\$265	Lump Sum	\$265		
Accommodations	\$165	4	\$660		
Meals	\$65	6	\$390		
Photography	\$100	Lump Sum	\$100		
Technical	\$250	Lump Sum	\$250		
Workshop materials	\$100	Lump Sum	\$100		
Step 1 Expenses					\$2,865
Total Step 1 Fees & Expenses					\$18,185

Step 2: Develop the Strategy

2.1 Refine the vision for downtown & its sub-areas					
2.2 Outline potential new design standards					
2.3 Outline potential new design guidelines					
2.4 Discuss with client in a conference call					
Personnel	Rate	Hours	Amount	Subtotal	
N. Winter	\$190	16	\$3,040		
J. Husband	\$130	32	\$4,160		
M. Boyle	\$100	8	\$800		
Graphics/admin	\$70	10	\$700		
Step 2 Fees					\$8,700
Expenses	Cost	Quantity	Amount	Subtotal	
Reproduction	\$100	Lump Sum	\$100		
Technical	\$100	Lump Sum	\$100		
Step 2 Expenses					\$200
Total Step 2 Fees & Expenses					\$8,900

Step 3: Develop the Design Standards and Guidelines				
3.1 Develop draft #1 of the design standards & guidelines				
3.2 Review with client via conference call				
3.3 Develop draft #2 of the design standards & guidelines				
3.4 Work session with staff (Trip 2)				
3.5 Present draft #2 in Workshop #2 (Trip 2)				
3.6 Joint work session with CC and P&Z (Trip 2)				
3.7 Develop the final draft of design standards & guidelines				
In-house fees				
Personnel	Rate	Hours	Amount	Subtotal
N. Winter	\$ 190	32	\$ 6,080	
J. Husband	\$ 130	80	\$ 10,400	
M. Boyle	\$ 100	24	\$ 2,400	
Graphics/admin	\$ 70	40	\$ 2,800	
Total In-house Fees				\$21,680
On-site fees (2 people, 2 nights)				
Personnel	Rate	Hours	Amount	Subtotal
N. Winter	\$ 190	24	\$ 4,560	
J. Husband	\$ 130	24	\$ 3,120	
Total On-site Fees				\$7,680
Expenses	Cost	Quantity	Amount	Subtotal
Airfare	\$ 400	2	\$ 800	
Surface transit, Parking	\$ 100	3	\$ 300	
Car rental	\$ 265	Lump Sum	\$ 265	
Accommodations	\$ 165	4	\$ 660	
Meals	\$ 65	6	\$ 390	
Reproduction	\$ 100	Lump Sum	\$ 100	
Technical	\$ 100	Lump Sum	\$ 100	
Workshop Materials	\$ 100	Lump Sum	\$ 100	
Step 3 Expenses				\$2,715
Total Step 3 Fees & Expenses				\$32,075

Step 4: Adoption					
4.1 Prepare Powerpoint presentation					
4.2 Present final draft to Planning Commission (Trip 3)					
4.3 Present final draft to City Council (Trip 4)					
In-house fees					
Personnel	Rate	Hours	Amount	Subtotal	
N. Winter	\$190	2	\$380		
J. Husband	\$130	2	\$260		
Graphics/admin	\$70	2	\$140		
Total In-house Fees				\$780	
On-site fees (1 person, 1 night x 2 trips)					
Personnel	Rate	Hours	Amount	Subtotal	
N. Winter	\$190	32	\$6,080		
Total On-site Fees				\$6,080	
Expenses	Cost	Quantity	Amount	Subtotal	
Airfare	\$400	2	\$800		
Surface transit, Parking	\$100	4	\$400		
Car rental	\$350	<u>Lump Sum</u>	\$350		
Accommodations	\$165	2	\$330		
Meals	\$65	4	\$260		
Step 4 Expenses				\$2,140	
Total Step 4 Fees & Expenses					\$9,000
TOTAL FEES & EXPENSES					\$68,160