

SCOPE OF SERVICES

HR&A Advisors, Inc. (HR&A) proposes to undertake the following work streams and complete the following deliverables in 2023. Prior to kicking off each work stream, HR&A will work with executive staff leadership to document a more detailed description of tasks, milestones, deliverables, and deadlines.

Deliverable Framework #1: Historic Preservation Policy Implementation

Executive Team Lead – CM Broadnax & ACM Al-Ghafry

Departmental Lead – Julia Ryan, Director of Planning and Urban Design and to-be-appointed historic preservation lead

Timing - initiate in January 2023, and will take 1 year to complete

In mid-2022, due to ongoing stakeholder engagement, historic preservation emerged as a barrier to achieving equitable economic development under the Economic Development Policy (EDP) and the Racial Equity Policy (REP). At the Executive Team's direction, HR&A conducted internal and external engagement and policy development culminating in drafting the City's first-ever Historic Preservation Policy. In 2023, HR&A proposes to continue to assist the CMO and the Office of Historic Preservation (OHP) to design and implement an equitable historic preservation program as follows:

- Collaborating with staff and stakeholders to identify ordinances for adoption and amendment to streamline services to residents and increase the inclusivity of criteria for historic significance and Landmark Commissioner appointment.
- Assisting the OHP lead to conduct inclusive engagement to ensure a strategic plan that meets community needs.
- Working with OHP lead on the solicitation of a historic preservation consultant to conduct inclusive historic resource surveys and develop historic context statements, including assisting to draft a Request for Proposal and participating in interviews.
- Designing and overseeing an equitable and inclusive community engagement strategy, in close collaboration with community-based organizations and the historic preservation consultant, to inform the historic resource surveys, historic context statements, and OHP strategic plan.

Deliverable Framework #2: Economic Development Incentives Policy Implementation

Executive Team Lead – ACM Al-Ghafry

Departmental Lead – Robin Bentley, Director of Office of Economic Development

Timing - likely early 2023 for 6 months

Since early 2022, HR&A has worked closely with the Office of Economic Development (OED) to revamp the City's Incentives Policy (Policy), with a focus on providing access and opportunity for small and Minority and Women-Owned Business Enterprise (MWBE) developers and catalyzing investment in Southern Dallas in alignment with the EDP. Following Policy adoption, HR&A will support the OED on two important aspects of the Policy:

- Supporting the development of reports and dashboards to provide transparency and track outcomes.
- Supporting the drafting of informational and marketing materials related to the Incentives Policy.

Deliverable Framework #3: Community Development Unit Planning & Launch Support

Executive Team Lead – CM Broadnax

Departmental Lead – to-be-assigned by City Manager prior to initiation

Timing – Begin February 2023, and will take 6 months to complete

The EDP and REP include interdepartmental mandates that necessitate an interdepartmental resource for staff to complement their department-specific, technical expertise and services. Staff have requested this assistance for increased transparency, accountability, problem solving, practical solutions, and collaboration.

Therefore, to meet these needs, HR&A will support the planning and creation of the forthcoming Community Development Unit (Unit) being created within the City Manager’s Office. These dedicated staffers, knowledgeable about each Council district, will work across departments to implement innovative approaches to public administration and public policy. The Unit will support community engagement and communications for departmental policies and initiatives; communicate with departments and the community on behalf of City Council districts; manage the launch of innovative tools and services; identify and deliver catalytic real estate and economic development projects while aligning with the OED and the Economic Development Corporation (EDC) and offer additional ad hoc strategic policy and program design services to departments. As this CMO team is formed and leadership is identified, HR&A will support the Unit by facilitating conversations to establish a clear mission, function, organizational structure and, subsequently, developing a strategic plan and deliverables for the Unit.

Deliverable Framework #4: Equitable Budgeting/Bonding Advisory

Executive Team Lead – CM Broadnax

Departmental Lead – Adriana Castaneda, Director of Office of Bond and Construction Management

Timing - beginning early 2023 and ongoing for 1 year

During the transition year, staff identified that updating the budgeting and bonding process was a logical next step in dissolving barriers to equitable economic development and carrying the vision of both the EDP and the REP forward. HR&A will support this effort in close collaboration with staff, reviewing the existing programs and processes and subsequently designing recommendations for amendment or adoption by City Council, likely informing, in a coordinated way, both the 2024 budgeting process and next GO bond. This includes working with staff and elected officials to define priority programs and budget, implementing a comprehensive “priority based” funding matrix utilizing priority-based budgeting for all projects and propositions, engaging with the community to ensure “need” overrides “loud noises” in planning for future projects, especially in

Southern Dallas, and creating a matrix of priorities and funding distribution.

Deliverable Framework #5: Dallas Small Business and Workforce Growth Roadmap

Executive Team Lead – DCM Tolbert

Departmental Lead – Joyce Williams, Director of Small Business Center

Timing – beginning February or March for ~6 months

As a key driver for the City's efforts to grow a strong workforce and a vibrant small business ecosystem, each of which are essential to growing an equitable economy, the SBC will continue to work with HR&A by assisting it to develop an implementation roadmap that leverages existing strategies to foster the growth of entrepreneurs and M/WBE small businesses, upskill and develop the City's workforce and reduce barriers to workforce entry for historically marginalized communities. In each of these areas, HR&A will:

1. Assess the existing toolkit to evaluate how existing programs function and identify the need for additional economic development policy and opportunities to better align and coordinate SBC efforts to support workforce development.
2. Develop strategies for impact by hosting internal and external stakeholder conversations. Based on these conversations, HR&A will recommend tailored strategies for the City in its role as a convener, employer, or funder.
3. Create operational roadmaps that include concrete, actionable steps to implement HR&A recommendations. The roadmap will include clear agency mandates, identify responsible personnel, and identify the optimal structure for the SBA to execute its work, as well as metrics by which to evaluate its success.

Deliverable Framework #6: Ongoing Strategic Advisory and Engagement

Executive Team Lead – CM Broadnax & ACM Al-Ghafry

Departmental Lead – None

Timing - Ongoing during 2023 for the duration of the contract

HR&A will continue to provide expertise to the Office of the City Manager and OED, particularly focused on systems, initiatives, partnerships, and staff roles that will improve how departments work together, service the community, and provide services efficiently and aligned with the state of the market. HR&A will engage regularly with executive, departmental, and elected leadership to share progress, identify additional internal or staff augmentation needs, and share progress.

TEAM & BUDGET

Over 15 members of the HR&A team in Dallas and across the country contributed substantively to supporting the City of Dallas during the current 18-month engagement. In 2023, the HR&A team will continue to be led by Andrea Batista Schlesinger as Partner-in-Charge, alongside Aaron Abelson as Project Manager, and Taylor Kay as Deputy Project Manager. HR&A will continue to draw on the expertise and resources of the firm to ensure the highest quality of service to the City of Dallas.

The economic development advisory services would continue for the period January 1 - December 31, 2023. The work will focus on the specified tasks outlined above. HR&A will meet with and report to the Office of the City Manager and OED on a recurring basis and anticipate continued engagement with staff and leadership from several City Departments and community-based organizations, as well as City Council Members.

Location and Meetings

HR&A's Dallas office is in the East Quarter, five minutes from City Hall. Expectations for this work will involve a variety of in-person, virtual, and hybrid meetings. Following any COVID-19 restrictions or protocols, HR&A will have Dallas office employees and leadership present to attend meetings at City Hall. Andrea Batista Schlesinger and other HR&A employees not located in Dallas will be available to travel regularly as needed.

Budget

HR&A anticipates that the work described above will require the same level of effort of our original contract original contract, totaling \$1,022,000.00. HR&A will submit itemized monthly billings for the scope of work performed during the period of January 1, 2023 to December 31, 2023. This is inclusive of necessary costs for data and travel. HR&A will provide the fixed-fee monthly invoice for services rendered following the completion of each month. HR&A is prepared to agree to the same contract terms adopted within the existing contract.

HR&A anticipates the additional services of subconsultants being necessary to complete the scope above, fees for which are not included in this fee and would only be pursued with the express authorization of the City Manager.