

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

Work Plan

The following work program identifies tasks to complete the Economic Vitality Strategy Responsibilities for both CAI and CITY are identified in the work plan.

TASK 1: PROJECT KICKOFF & ONGOING PROJECT MANAGEMENT

CAI will work with CITY leadership and staff to initiate project work and meet throughout the project to review progress and develop a draft strategy. CAI will provide monthly progress reports and coordinate with CITY staff from week to week via emails and phone calls, as necessary.

- 1.1 Kickoff Meeting.** CAI will facilitate a kickoff meeting with CITY and partners to discuss, at a minimum, the following:
 - Project Objectives
 - Scope and Schedule Review
 - Project Management Expectations
 - Stakeholder Engagement Strategies and Schedule
- 1.2 Finalize Engagement Plan (see Task 3).** CAI will take feedback from the kickoff meeting to refine the engagement plan and submit a detailed outline of engagement activities with known and potential dates, meeting locations (if in-person), staffing for facilitation, meeting objectives and needed materials. CAI will submit the plan as a formal deliverable. To guide the process, the engagement plan will identify roles and responsibilities and outline schedules and participation for both an Advisory Group and for an “Influencer” Group (details in Task 3).
- 1.3 Bi-Weekly Project Management Check-In Calls with Project Team.** CAI will facilitate brief bi-weekly check-in calls with the CITY to ensure progress toward milestones and address challenges as they occur.
- 1.4 Monthly Invoicing and Progress Reporting.** CAI will prepare and submit monthly invoices to CITY with a monthly progress report to document the work and ensure consistent progress toward project completion.

TASK 2: EXISTING CONDITIONS & LANDSCAPE ASSESSMENT

Task 2- Develop a robust profile of the regional economy and its workforce, which will be included as an appendix to the final strategy.

- 2.1 Landscape Assessment.** CAI will work with CITY and partners to inventory and review existing studies, plans, policies, and programs relevant to economic development in Mountain View and the region. This will include an assessment the General and Precise Plans, plans from the Association of Bay Area Governments (such as Plan Bay Area 2050), Metropolitan Transportation

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

Commission, Santa Clara County, and other policy documents and plans, as appropriate. Through engagement with CITY (as outlined in Task 3), this will also include an assessment of current programs and services and any gaps or redundancies, as well as an assessment of CITY and partners' organizational capacity and relative strengths and weaknesses. CAI will document and assess the City's role in economic development partnerships. Findings summarized in Task 2.3.

2.2 Socioeconomic Profile

2.2.1 Demographic, Economic & Workforce Profile. CAI will gather and analyze a wealth of demographic, economic and market data to characterize the local and regional economies, Mountain View and the Silicon Valley region, as well as the regional labor market. At a minimum, this will include a profile of population, employment, age, sex, race, housing, income, industry, and occupational data. CAI and CITY will jointly identify five (5) peer communities identified, including similar and aspirational communities, and utilized for socioeconomic trends comparison and baselining.

2.2.2 COVID-19 Impacts. To the extent possible, CAI will identify changes in the data collected in Task 2.2.1 that may be attributable to the COVID-19 pandemic. To expand this analysis, CAI will collect additional data from sources that track pandemic impacts specifically, including the U.S. Census Bureau's Household Pulse Survey. Findings will cover topics such as employment status, housing and food security, health, spending, and education, and summarized in Task 2.3.

2.2.3 Infrastructure Assessment. CAI will review existing studies and plans, such as the most recent quarterly CIP report, to identify current and anticipated infrastructure deficiencies across the Mountain View. Additionally, CAI will assess anticipated investments from state and federal government that directly impact infrastructure capacity in Mountain View. Findings summarized in Task 2.3.

2.2.4 Developable Land and Capacity Analysis. Based on growth trends, available population and employment forecasts, existing land use and future land use plans, a buildable lands analysis, and other information, CAI will assess the City's ability to accommodate anticipated growth, including for the industrial sector or on commercial/industrial lands. This task will prioritize locations in the city for a) accommodating new business growth and b) retaining existing business, with different strategies anticipated for different areas which could include potential use changes or development standards

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

augmentations, and both market viability or constraints of a location. Findings summarized in Task 2.3.

2.2.5 Industry Cluster Profiles. CAI will develop a detailed profile of up to five (5) existing and emerging industry sectors, including travel and hospitality, retail, and small business and entrepreneurship. Findings of these analyses summarized in Task 2.3.

- **Travel and hospitality** sector analyses that assess current assets and amenities, facilities, policies, and visitation trends to project future visitation and identify strategies to accelerate the recovery of this sector after disruptions from the COVID-19 pandemic. This task will include a fulsome SWOT analysis for the sector, as well as a projection of the Transient Occupancy Tax revenue for the next three (3) years.
- **Retail sector** analyses that include an inventory of retail space (by type) in Mountain View, retail gap or leakage analyses, and real estate market trends for local retail space. This task will include a SWOT analysis for the sector, policies, incentives and other strategies to strengthen the retail sector which could include a commercial (retail) vacancy registry or vacancy tax of commercial retail properties, and a projection of retail sales tax revenues for the next three (3) years.
- **Small and micro businesses and entrepreneurship** sector analyses that include a cost-of-doing-business assessment, profiles of individual businesses and the small and micro business sector in aggregate, and strategies to support business creation and small business growth.
- **Up to two (2) additional profiles** of industry sectors, as identified by CAI and the CITY, and based on data collected and early stakeholder engagement, with a focus on existing and emerging strengths or opportunities. Profiles will include current industry characteristics for Mountain View and the region, as well as potential strategies, or land use/code changes to improve the sector's prospects for growth.

2.2.6 Equity Metrics. CAI will develop a set of metrics, which may draw on data gathered throughout Task 2 and other regional equity plans and policies, to track the City's progress in creating and sustaining an equitable and inclusive economy. An equity lens is critical to this planning effort. This set of metrics will tie to individual strategies in the final plan and highlight appropriately elevating the issues.

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

- 2.3 Deliver Assessment, Profile & Fact Sheet.** Data and findings from all above tasks and subtasks to be summarized in a technical report, designed for inclusion as an appendix to the final strategy. This CAI deliverable will include a SWOT analysis, insights from above analyses, a synthesis of Mountain View’s socioeconomic Strengths, Weaknesses, (internally oriented or structural) and Opportunities and Threats (external) (SWOT). This profile will serve as a conceptual bridge in transitioning from analyses of baseline conditions and trends to action- oriented strategies aimed at achieving the city’s economic vision. The SWOT will also serve as a useful summary tool in public and stakeholder engagement (Task 3). The most critical findings from Task 2 to be summarized on a one-to-two-page Fact Sheet, which may be disseminated separately from the larger report.
- 2.4 Identification of Dashboard Indicators.** Key socioeconomic measures that can be baselined and effectively tracked over time to be identified by CAI in the above Tasks for inclusion in an implementation and evaluation dashboard (Task 5). CAI will include some or all of the equity metrics developed in Task 2.2.6.

TASK 3: PUBLIC & STAKEHOLDER ENGAGEMENT

The intent of the engagement program is to employ Mountain View and its partners in economic development, including local government, business, and nonprofit representatives and stakeholders – as well as historically marginalized communities – throughout the process to facilitate a sophisticated understanding of the regional economy and to curate a durable coalition to guide the plan and recommendations into action.

Phase I: Visioning and Strategy Development

- 3.1 Focused Outreach.** CITY will translate materials or facilitate the following engagement in various languages (Spanish and Chinese) to glean the best public participation and input for given stakeholder groups.
- 3.1.1 Orientation (one-on-one) Interviews.** CAI will collaborate with CITY to identify and schedule up to eight(8) interviews with key stakeholders or big-picture thinkers that understand Mountain View and its role in the region.
 - 3.1.2 Influencer Group.** Via orientation interviews (3.1.1) and with CITY, CAI will identify key individuals to comprise an “influencer” group with the capacity to accelerate engagement and participation throughout the community for the planning process. The Influencer Group will work in an ongoing fashion to help ensure diverse, inclusive participation across the Mountain View’s

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

diverse ethnic / racial, income, and age groups. CAI will work with the Influencer Group to disseminate materials and publicize meetings or opportunities for input.

3.1.3 Focus Groups. CAI will identify and facilitate up to eight (8) focus groups representing anchor industries and sectors or other key interests. The focus groups participants will be interviewed to understand specific needs and challenges, the impact of the COVID-19 pandemic, and emerging opportunities. At least four (4) of the eight (8) focus groups will directly support analyses in Task 2, including the Landscape Assessment and Industry Cluster Profiles. CAI and CITY will identify the remaining focus groups to engage.

3.1.4 Economic Vitality Strategy Advisory Group. In addition to the Project Team of active participants outlined in **Task 1** to help guide the day-to-day process, CAI and CITY will identify an advisory or steering committee of representatives from the business community, local government, and economic and business development organizations will be convened to guide higher-level strategic aspects of planning, engagement, implementation, and evaluation. This group will engage near the beginning, middle, and end phases of the process with up to four (4) total meetings. At a minimum, this group will review and provide feedback on interim findings and draft deliverables.

3.2 Studio Series. In collaboration with CITY and economic development partners, CAI will design a process to gather public input (in-person or virtual) in the form of a series of studio or pop-up events. The studios will distribute and collect surveys outlined in Task 3.4, and to obtain other feedback on the strategy as it develops.

3.2.1 Vision Studio. CAI to design and hold one studio to present a working draft vision for Mountain View's economy, along with discussion of the SWOT summary identified in Task 2.3. The vision, intends to complement the citywide vision contained in the General Plan, will also be articulated on the project website (Task 3.3) for ongoing public review and comment.

3.2.2 Goals & Strategies Studio. CAI to design and hold another studio convening to understand public preferences regarding primary goals and objectives for Mountain View's economic future. The goals are foundational to the Economic Vitality Strategy and represent the highest level of the strategic

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

framework, while the strategies focus and indicate an approach to achieving the goals.

- 3.2.3 Implementation Studio.** CAI to design and hold a third studio focusing on the identification of specific actions to implement the strategies, as well as on the prioritization of actions for Near-term implementation and allocation of resources.

Phase II: Online Presence

Project Website. CAI will develop content for a project website that will allow the CITY to share information, events, findings, and draft deliverables from the planning process, as well as to solicit input and public comment. The content for the website will allow linking to project's social media (Task 3.5), surveys (Task 3.4), and will include a dynamic mapping and comment form to solicit insights and ideas related to economic vitality/development in Mountain View.

- 3.3 Business and Resident Surveys.** CAI will design and analyze the results from two surveys. A business survey will focus on the region's industries, workforce, supply chains and other economic considerations. The resident survey will focus on a vision for economic growth and key priorities for the city to consider. Both surveys will elevate equity considerations. The surveys will be available online, in print form for the studio series, and could be mailed or e-mailed to existing distribution lists. CITY will be responsible for managing distribution of the CAI developed surveys.
- 3.4 Social Media.** CAI will develop and provide content to CITY to integrate into outreach on City's Instagram, Facebook live, Nextdoor, YouTube and / or other channels as appropriate. CAI will coordinate updates, news, and notices with CITY at key points throughout the project. CAI to provide content to the city for use on the CITY's existing social media platforms.

Phase III: Public Presentation & Comment

- 3.5 Public Presentation & Comment.** CAI will facilitate informal and formal presentations of the draft and final Economic Vitality Strategy following the City Brand Guidelines for presentations ([City of Mountain View - Logo Guidelines](#)). The informal presentation may consist of dissemination of the draft via the project website, while the formal presentation will take place during a meeting and is anticipates engaging City Council.
- 3.6 Comment Integration.** CAI will integrate comments, input and document how comments were resolved.

TASK 4: VISION AND GOALS

Exhibit A

Community Attributes, Inc. (CAI) Scope of Work

A clear, aspirational Vision statement and concrete, measurable goals, strategies and actions will form the bedrock of this Economic Vitality Strategy. With the insights and ideas gained through previous visioning and public and stakeholder engagement, and in close collaboration with the Advisory Group, CITY, CAI will draft and refine a vision and high-level goals to ground and guide the development of strategies and actions for Mountain View.

- 4.1 Existing Economic Visioning and Goals.** CAI in collaboration with CITY and partners, will mine existing statements articulating vision and goals related to economic development, such as the General Plan, Plan Bay Area 2050, and others from the Landscape Assessment (Task 2.1); CAI will organize and tabulate to ensure alignment.
- 4.2 Synthesize Engagement Findings.** CAI will document, organize, and report to the CITY all engagement findings related to potential vision and goal development and will draw from and refer to these when drafting the new content.
- 4.3 Draft and Refine a Vision Statement for Mountain View's Economy.** CAI will draft an initial Vision statement and refine it in collaboration with the Advisory Group.
- 4.4 Iteratively Develop Economic Vitality Goals.** CAI will work with the project team and the Advisory Group to develop specific, actionable, and measurable Goals for inclusive, sustainable economic development in Mountain View.

TASK 5: STRATEGIES, ACTIONS & IMPLEMENTATION

This task will bring together analyses, visioning, and engagement findings to create a detailed roadmap articulating short-term and long-term priorities for Mountain View, including immediate needs for COVID- 19 recovery, and downfield strategies to support economic vitality, resiliency, and equity. CAI will also develop information to support implementation, including the development of a web-based dashboard to track key metrics and milestones associated with implementation of the strategies.

- 5.1 Intensive Strategic Workshopping.** CAI will engage both the Project Team and Advisory Group partners to inform and then author an actionable economic vitality strategy for the region. This process is iterative, with CAI returning revised drafts to CITY as necessary to improve and update the plan. The final Economic Vitality Strategy (EVS) will identify both near-term (one to three years) and pandemic-related priorities, as well as longer-term (more than three years) strategies and considerations. Additionally, CAI will facilitate conversations to identify interventions at a detailed tactical level, which will inform a near-term implementation action plan (Task 5.3) for CITY.

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

5.2 Vitality Plan (Strategies & Actions). CAI will bring together all of the pieces from the previous tasks conducted to date, telling the story of the region and Mountain View's economic development vision and strategic priorities artfully and graphically, supported by focused data and infographics. CAI will work through several drafts of the plan, producing an internal working draft early in the phase, for review and improvement at all team meetings.

5.3 Near-Term Implementation Plan. CAI will work with the Project Team and Advisory Group to identify key actions for near-term implementation within existing budgetary and capacity constraints, in order to kick-start the transition from planning to implementation and develop near-term momentum for longer term recommendations and interventions. For each action, specific implementation steps will be identified, , lead and supporting roles identified, interim milestones, a timeline and level of effort outlined.

5.4 Determine Prosperity Metrics. CAI will identify and propose a group of shared metrics to track the region's baseline performance and progress on critical economic, environmental, and social outcomes in the areas of Equity, Industries, Jobs, Workforce Preparedness, Infrastructure, Environment, and Livability. This task will incorporate metrics identified in Task 2, and a subset of the prosperity metrics will be present on the dashboard in Task 5.5.

Interactive Data Dashboard. CAI will then wireframe and prepare a robust, graphically oriented, and easy-to-navigate data dashboard for hosting on the CITY's website to track the prosperity metrics in Task 6.1. The dashboard will be oriented toward policy makers, partners, and economic development professionals; businesses looking to locate or expand in the region; and community members looking to understand and hold leaders accountable for economic progress. Additional functionality would allow economic development partners to collaborate and access information without having commission outside contractors for analytics or commit internal staff time.

5.5 Evaluation Protocols. CAI will work with the Project Team and Advisory Group to identify a format and timeline for periodic ongoing assessment of the EVS implementation. This will include progress reporting templates, defined meeting schedules and other process improvement and capacity building.

5.6 Deliver and Present Final Economic Vitality Strategy. CAI will compile all appropriate materials, including summaries of key analyses and the breadth of strategic content developed in Task 4 and 5, into a final accessible PDF report, graphically compelling Economic Vitality Strategy. CAI will provide CITY with electronic native files for infographics, analysis, and charts incorporated into the Economic Vitality Strategy (EVS). CAI will present the EVS to City Council in accordance with the meetings outlined in Task 3.

5.7 Additional Presentations to City Council and Committees/Advisory

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

Bodies. CAI shall provide up to three (3) additional Council or subcommittee/advisory body presentations on the Economic Vitality Strategy. CITY will provide CAI advanced notice of any additional Council or subcommittee/advisory presentations not contemplated within the workplan of this Agreement. CAI will provide cost estimate to CITY in advance of commencing any work. CITY to provide written authorization of any additional presentations.

TASK 6: ADDITIONAL SERVICES

CAI shall provide additional services only by advanced, written authorization from the CITY. CAI, at the CITY's request shall submit a detailed written proposal including a description of the scope of services, schedule, and CONSULTANT's proposed maximum compensation, including reimbursable expense. The additional services scope, schedule and maximum compensation shall be negotiated CITY and CAI prior to commencement of the services.

Exhibit A
Community Attributes, Inc. (CAI) Scope of Work

COMPENSATION

The CITY agrees to compensate CAI for professional services performed in accordance with the terms and conditions of this Agreement, and as set forth in the budget schedule below. CAI shall perform the tasks and categories of work as outlined and budgeted below. CITY may approve in writing the transfer of budget amounts between any of the tasks or categories listed below provided the total compensation for Tasks, including reimbursable expenses, and the total compensation for Additional Services do not exceed the amounts set forth in Section 3 of this Agreement

Budget Schedule	Not to Exceed
Task 1 (Project Kick off)	\$12,900
Task 2 (Existing Conditions)	\$46,900
Task 3 (Public Engagement)	\$52,600
Task 4 (Vision and Goals)	\$7,800
Task 5 (Strategies and Actions)	\$37,500
Task 6 (Additional Services)	\$20,000
Total Maximum Compensation	\$177,700