

MAINSTREET SCOPE OF WORK

During the term of this Agreement, the independent on-call business consultant, (CONSULTANT) shall perform professional services for the Regional Transportation Authority's MainStreet Business Assistance Program (MAINSTREET) as part of the voter-approved plan of the RTA, which is managed by Pima Association of Governments. This scoping document shall be used to plan, conduct and complete the work within the MainStreet program.

I. Background

MainStreet is a regional small business assistance program funded by the Regional Transportation Authority (RTA). Funding for the program was part of the voter-approved RTA plan on May 16, 2006. The \$2.1 billion, 20-year RTA plan included \$10 million for small business assistance to help minimize the construction impacts to businesses along the transportation improvement projects within the RTA plan. All local jurisdictions in Pima County have utilized the MainStreet program since its inception in 2007 on RTA projects.

II. Program Description

At MainStreet, our mission is to provide outreach and consulting services to businesses located in RTA-related transportation improvement zones which will enable them to sustain their business and make responsible choices that will enhance their ability to succeed and prosper.

Our program vision states that we believe it is possible for a business affected by RTA transportation improvement projects to remain healthy, energized and prosperous during the construction process. The core values within our program focus on collaboration, creativity and accountability.

All businesses located within a quarter mile of the construction zone on RTA-funded transportation projects are eligible for MainStreet services. All services provided by MainStreet are free to the businesses. An estimated 10,000+ businesses are located within this quarter mile zone on all RTA projects.

National studies and direct experience within the MainStreet program have determined that successful construction mitigation comes down to executing within the following two key areas:

- To effectively and consistently communicate to the businesses both before and during the project
- To help businesses directly plan for and act on elements that may negatively impact them

MainStreet business assistance program services are provided by independently contracted private sector business CONSULTANTS. Their construction mitigation roles

and responsibilities fall in two categories:

- Business Outreach Liaison CONSULTANT
- Direct Business Consulting CONSULTANT

III. Program Work Tasks

General Assumptions:

1. The selected MainStreet business outreach liaison CONSULTANT will be the principle contact for businesses within the project boundaries.
2. The managing jurisdiction will provide MainStreet business outreach liaison CONSULTANT with regular project updates and general project materials for distribution to the project businesses. These materials may include: fact sheets, project updates (schedules, newsletters, maps, etc), design plans, open house invitations, traffic control plans, public meeting notices and other relevant project information.
3. Any business information shared between MainStreet CONSULTANT(S) and project-area businesses covered under a signed MainStreet Use Agreement is to be kept confidential.
4. Visits by MainStreet CONSULTANT are defined as face-to-face visits to a business and can include additional emails, phone calls or other means of direct communication.
5. MainStreet CONSULTANT hours will generally be daily Monday through Friday. The workweek may need to be adjusted to fit the needs of a specific project element or business schedule.
6. MainStreet CONSULTANT will supply a laptop computer or tablet and a smart phone for their work within the program.

TASK 1 - Business Outreach Liaison CONSULTANT Roles and Responsibilities

CONSULTANT will directly provide the following business outreach liaison services to business owners, managers and/or staff members on assigned RTA transportation improvement projects. The primary purpose is to facilitate communication between the individual businesses, the jurisdiction's project team and the MainStreet business consulting team through information, services and opportunities that may help to mitigate the effects of construction. On each individual RTA project assigned by the MainStreet program manager, the anticipated business outreach liaison CONSULTANT activities and tasks are as follows:

- a. Act as a point-of-contact liaison for outreach area businesses addressing project-related issues, questions, comments and concerns.
- b. Establish a friendly professional relationship with owner(s), manager(s) and staff.
- c. Develop and implement a *Business Outreach Plan*.
- d. Regularly visit and engage face-to-face with all businesses in the *Business Outreach Plan*.

- e. Provide all appropriate project materials and handouts (i.e. project notices, traffic control plan changes, project schedule updates, newsletters, etc.) to area businesses during the planning and construction phases.
- f. Disseminate all approved MainStreet and RTA materials and handouts.
- g. Provide pro-active rather than reactive communication: informing stakeholders of important issues before they happen whenever possible.
- h. Engage in two-way communication with opportunities for businesses to provide feedback.
- i. Log visits and outreach notes in MainStreet's Customer Relations Database (CRM) system following established standardized documentation protocol.
- j. Provide referrals to appropriate agency contacts and/or other project team members.
- k. Continually introduce the MainStreet business assistance program and the benefits of its free services to all businesses.
- l. Attend project meetings and other community outreach meetings to fully understand the project, history, decisions, schedule, impacts, etc. for the area businesses.
- m. Provide project team with information from business owners that may be useful in decision-making and communication processes.
- n. Attend all project partnering and internal pre-construction meetings.
- o. Attend weekly construction meetings and disseminate appropriate materials and verbal updates associated with these meetings.
- p. Contribute to decision making regarding project-related communications.
- q. Assist with MainStreet services coordination between MainStreet business consulting team and area businesses as needed.
- r. Keep MainStreet program manager informed of upcoming construction activities, impacts and issues of concern.
- s. Continually improve MainStreet outreach services by soliciting business feedback of program services.

TASK 1 - Business Outreach Liaison CONSULTANT Deliverables:

1. Develop MainStreet *Business Outreach Plan* for assigned project based upon project scope, schedule, potential impacts, timelines, area business numbers and profiles, etc.
 - Include anticipated number of outreach visits, materials, schedule, etc.
 - Identify, classify and weight businesses within the project that may be more susceptible and vulnerable to project impacts.
2. Project business database creation and verification update within MainStreet CRM database.
 - Identify all businesses within anticipated construction project area.
 - Update non-confidential information (business contact, address, phone, email, etc.).
3. Document all business outreach communication within MainStreet CRM database.

4. Lead business consulting intake interviews.
 - Generate direct business consulting hours within application tool.
 - Determine MainStreet business consulting team for formal *Business Assessment*.
5. Create *Business Outreach Plan* summary report, including overview, businesses assistance participation, general observations, best practices learned, etc.

TASK 2 - Direct Business Consulting CONSULTANT Roles and Responsibilities

Direct consulting services have been utilized by over 600 businesses on RTA projects and they have typically made a significant difference for them. MainStreet estimates that over 1,000 businesses will use the direct consulting services over the life of the RTA Plan. CONSULTANT will directly provide the following direct business consulting services to business owners, managers and/or staff members on assigned RTA transportation improvement projects:

- a. Conduct pre-consultation intake with MainStreet business outreach liaison CONSULTANT.
 - Utilize MainStreet's *Intake Assessment* software tool.
 - Discuss available services, expectations, responsibilities, possible deliverables, etc.
- b. Sign MainStreet's *Use Agreement* and schedule *Business Assessment*.
- c. Conduct 90 to 120 minute formal *Business Assessment* with additional CONSULTANT(S) and (optional) business outreach liaison CONSULTANT.
- d. Determine Lead CONSULTANT on team.
- e. Write/deliver/sign *Summary and Recommendations* report outlining consulting action items, tasks and timelines.
- f. Deliver your consulting deliverables.
- g. Coordinate other CONSULTANT(S) consulting deliverables.
- h. Deliver/sign *Acknowledgement of Completion*.
- i. Provide *Acknowledgement of Receipt of Deliverables*.
- j. Provide *Feedback Survey* forms when consulting services are completed.
- k. Provide all closing documents to MainStreet.

TASK 2 - Direct Business Consulting CONSULTANT Deliverables:

1. Conduct *Intake Assessment*.
2. Conduct and provide *Business Assessment*.
3. Analyze, write and provide *Summary and Recommendations* report.
4. Provide consulting services including all consulting deliverables determined in *Summary and Recommendations* report.

TASK 3 - Additional CONSULTANT Roles and Responsibilities

As mutually agreed upon, CONSULTANT will assist MainStreet Project Manager in:

- a. Fostering and promoting the RTA and MainStreet's public purpose and success through outreach, consulting and combined resource efforts.
- b. Further development of MainStreet's services, materials and deliverables while assessing and recommending improvements in program delivery and development.
- c. Contribute regularly to MainStreet conference calls.

TASK 3 - Additional CONSULTANT Deliverables:

1. Special assignments or duties deemed appropriate or necessary and in keeping with the Scope of Work services identified above.

IV. Cost of Services and Billing Schedule

CONSULTANT will provide services as described above. The RTA shall pay the CONSULTANT the sum of Thirty Dollars an hour for all client and administrative support services, or Sixty Dollars an hour for all business outreach-related services, or Seventy Dollars an hour for all direct business consulting, excluding all transportation and traveling related services. CONSULTANT will provide services from an October 1, 2016, to June 30, 2017, period of this agreement. Payable based on CONSULTANT invoices and worksheets itemizing the number of hours worked and the generally described services performed. The CONSULTANT will bill the RTA within 3 days after the 15th and 31st of each month in which the billable activity has incurred. The RTA shall pay each invoice within 30 days of its receipt.