



**Exhibit A of Standard Agreement between the
Marion County Board of County Commissioners
and
Kimley-Horn and Associates, Inc.**

**SCOPE OF SERVICES
FOR PROFESSIONAL SERVICES
For
US HWY. 27 AREA STUDY MASTER PLAN
(RFQ 25Q-145)
Marion County, Florida**

KIMLEY-HORN AND ASSOCIATES, INC.
(Consultant)

(By: Signature)

Richard V. Busche, PE – Sr. Vice President
(Print Name and Title)

Date: May 5, 2026

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PART I – PREAMBLE

1. PURPOSE

The purpose of this Agreement is to describe the scope of work and the responsibilities of Kimley-Horn and Associates, Inc., hereinafter called the ENGINEER and the Marion County Office of the County Engineer, hereinafter called the COUNTY, in connection with the ***US Highway 27 Area Study Master Plan***.

This Scope of Services is to prepare a Master Plan for the US Highway 27 (US 27) Area as depicted on Exhibit A. The ENGINEER was selected for this project in 2025 under a competitive process consistent with the CCNA process contained in the Florida Statutes as part of RFQ# 25Q-145.

To execute the Scope of Services, a Consultant Team has been created that will consist of Kimley-Horn and Associates, Inc. (Prime Consultant) and Dover Kohl & Partners (Subconsultant). The Consultant Team will coordinate its efforts to execute the Scope of Services outlined below.

The purpose of the Plan is to provide a framework to guide future development and coordinate future public and private investment efforts in the US 27 corridor. The Plan will reflect perspectives of area stakeholders and COUNTY officials and draw on non-COUNTY external operators to identify opportunities to create and activate an urban equine-influenced community. The final product will be a development plan for the area, providing a clear framework for future development and infrastructure coordination, with well-defined, realistic short-term and long-term objectives as part of an implementation action program. The expectation is that the Plan will serve as a blueprint for community coordination among property owners and serve as an example for similar plans to be prepared for other areas of the COUNTY.

The scope of the Master Planning effort, community involvement, agency and stakeholder meetings, and the contents of the final Plan deliverables are detailed in the following Scope of Services.

PART II –SCOPE OF SERVICES

TASK 1 – EXISTING CONDITIONS AND MARKET ANALYSIS

The activities that will be undertaken include the following:

- A. The Consultant Team will produce an Existing Conditions and Market Analysis consisting of the following:
 1. Summary of existing research reports and plan documents from jurisdictional agencies and/or their departments or divisions, such as those from Marion County (the COUNTY), City of Ocala (the City), the Transportation Planning Organization (TPO), Florida Department of Transportation (FDOT), and Florida Department of Environmental Protection (FDEP), etc.
- B. The Consultant Team will provide analysis and mapping in the following areas:
 1. Land Use & Development
 - a. Maps:
 - 1) Existing Land Use using data from the Property Appraiser.
 - 2) Future Land Use Map
 - 3) Approved major public and private development projects within, or at the border of, the study area based on data provided by Marion County.
 - 4) Programmed transportation improvements expected for the Plan area as noted by other local studies, such as the TIP or LRTP.
 - b. Analysis:
 - 1) Existing Land Use with a determination of compatibility and functionality of existing land use patterns.
 - 2) Development projects in progress and planned in the adjacent area and their impact on the subject area.
 - 3) A narrative describing the opportunities, constraints, and major characteristics of the study area and the identified subarea.
 2. Market Analysis
 - a. Inventory of existing economic anchors, and major planned public and private investments within and adjacent to the Study area that could impact development marketability. These investments could include road improvements, public utility expansions, civic or cultural facilities, employment centers, and private real estate developments.
 - b. Annual at-place employment trends by industry for Marion County, describing overall growth and shifts between sectors. Average wage trends by industry will be analyzed. Current employment levels in the study area will be presented, and ten-year forecasts will be prepared.

- c. Population and household trends by age and income for the study area around the subject property and compare that data to Marion County from 2010 to 2025. Ten-year forecasts will also be provided.
- d. Tapestry Segmentation from ESRI to provide insight into the purchasing preferences for housing and other goods.
 - 1) Market Assessment
 - 2) Residential Market Assessment
 - a) Existing inventory of for-sale and rental housing in the study area. The housing inventory will be described by unit type, tenure, and value. National housing trends that could impact the Marion County market will be described.
 - b) Analyze for-sale momentum in the study area and Marion County over the last decade, including building permit activity, single-family detached and single-family attached unit completions, closings, days on the market, and price points. For multi-family rentals, our team will analyze existing inventory, construction absorption, vacancy rates, and rent performance measures.
 - c) To better assess future demand for housing, the team will leverage the population forecasts to forecast the number of new residential units that could be supported in Marion County and the study area by type and price point over a ten-year period. We will compare the known development pipeline to estimate the net housing demand for the community.
 - 3) Commercial Market Assessment
 - a) Retail, office, industrial, and hospitality inventories, construction, net absorption, vacancy/occupancy rates, and price point performance measures in the study area and Marion County. The Commercial Market Analysis will describe national trends in retail, office, industrial, and hospitality that could impact the market for these real estate sectors in the COUNTY.
 - b) For each commercial sector, we will describe the five (5) representative projects in more detail, including a snapshot of key tenants, vacancy rates, and rents. This information will provide insight into the most competitive commercial properties in the community. Our team will describe the commercial development pipeline for projects that are under construction or proposed in the COUNTY, including total square footage by sector, and estimated annual delivery dates.
 - c) The Commercial Market Analysis will leverage population and employment forecasts to project the amount of retail, office, and industrial square footage and hotel rooms could be supported in Marion County and the study area over the next ten years.
 - d) Based on the Residential and Commercial Market Assessments, ENGINEER will identify potential opportunities or real estate market gaps for residential units and commercial retail space that could be attracted to the study area over the next ten years.

- e) ENGINEER will report findings of the market analysis, providing a summary of highest and best uses for the study area and provide guidance on overall site design, including growth scenarios for the design charrette.

3. Infrastructure/Public Services

a. Multi-modal connectivity

Within the subject area, a bikeable, pedestrian, and equestrian-friendly environment is a vital component of the vision for the community, and consideration must be given to internal connectivity and external connectivity with nearby developments (e.g., WEC, Ocala Preserve, Ocala Palms, etc.)

Vehicular connectivity of the community to adjoining and surrounding areas – including NW 80th Avenue, NW 60th Avenue, NW 21st Street, and the broader roadway network must be a key factor, including connectivity to the new I-75 Interchange (planned Buc-ees location).

- 1) The following elements will be analyzed with “Complete Street” concepts in mind:
 - a) Vehicular circulation and traffic operations
 - b) Pedestrian movement
 - c) Bike and equestrian trails connectivity
 - d) Existing traffic data, including groupings (e.g., traffic violations, traffic/multi-modal crashes, including loss-of-life), and potential correlations to existing circumstances and future development. Identify types of infrastructure improvements that could mitigate serious injuries and mitigate traffic impacts (e.g., multimodal paths, connectivity between developments, change in design, urban design and land use opportunities, etc.) that may be undertaken by the COUNTY, other agencies, and/or addressed in development standards.
- b. Utilities (e.g., central water, central sewer, etc.) – will be analyzed based on existing information, planned improvements within the study area, and identifying current and projected capacities and needs based on development scenarios of the resulting master plan.
- c. Stormwater – a cursory analysis will be performed based on existing information (e.g., basin studies, etc.), identifying shortfalls (e.g., floodplains and flood-prone areas, no systems, historic system designs, etc.) and likely needs (e.g., minimum compliance, potential needs for development scenarios, etc.), and opportunities for coordination with other infrastructure activities.
- d. Parks & Recreation – facilities available, facilities coordinated with demographics, etc.
- e. Public Safety – facilities available, facilities coordinated with demographics, etc.

4. Planned Service Area (PSA)
 - a. Identify a specific node(s) that could function as a central hub for the area where utilities are already available, or can feasibly be available, and mixed uses and a mixture of uses are economically viable.
 - b. Provide a guidance plan for the PSA that functions as a catalyst for growth and development for the area.

TASK 2 – COMMUNITY INPUT AND MASTER PLANNING

This Task shall provide a plan for robust public participation to ensure the Plan's development reflects a diverse representation of community viewpoints. This will involve a variety of methods to increase participation opportunities, including a combination of community forums, focus groups, stakeholder groups, interviews, and surveys. For website updates, social media updates, etc., the Consultant Team will periodically provide materials to the COUNTY for their use in posting updates on the COUNTY's website and social media accounts. Creation of a separate website for this project is not included.

Participation and input shall be sought as follows:

A. Site Visit & Study Area Tour

1. Key representatives of the Consultant Team will travel to the study area for a two-day site visit to better understand existing connectivity, development patterns, rural/natural elements, and to introduce all members of the Consultant Team to the region. With assistance from the COUNTY, the tour is expected to be co-scheduled with meetings with relevant stakeholders, staff, and elected officials to confirm goals for the planning effort, review any base information needs, identify key sites and historic places, align on the direction for the public participation process, and refine the project's timeline. As part of the site visit, the team will visit key locations within the study area to document existing conditions, while capturing photographs or videos that may serve as base information for the design charrette.

B. Public Engagement/Participation

1. Engagement Strategy Meetings/Pre-Charrette Set-up

The Consultant Team will develop a public engagement strategy with the COUNTY, detailing outreach methods and opportunities to be used throughout the project. This plan will be coordinated with any similar, concurrent projects and/or incorporate effective past findings, reports, or methods as provided by the Client. A meeting between the Consultant Team and the Client to confirm the charrette schedule, logistics, and objectives will take place in advance of the charrette week.

2. Public Design Charrette

This Task is centered on a five-day Public Design Charrette held on-site within the study area. This intense, multi-faceted approach to public involvement will allow stakeholders to cooperatively develop a vision that serves as the foundation for future strategic decisions and the overall design direction of the Master Plan. It also allows the Consultant Team to work together with the COUNTY to make significant progress towards project deliverables. Our anticipated work plan and schedule for a five-day Public Design Charrette consists of:

- a. Charrette Travel and Public Kick-off (Day One) – The Consultant Team will arrive in advance to both set up for the week and to host a public kick-off event at a location to be scheduled. This is intended to build excitement and raise awareness for the remainder of the week and will serve as an opportunity for members of the public and other stakeholders to be introduced to the project and the team.
- b. Open Design Studio (Day Two) –The Consultant Team will lead a presentation of the existing conditions as well as our initial impressions from the site visit followed by a hands-on design session to work with community participants in identifying key elements of their vision for the future. This can be broken into multiple sessions as needed to focus on the differing areas of the study area. The hands-on design session will provide participants with the opportunity to interact with differing perspectives, allowing concerns to be quickly identified and discussed while helping establish strong community consensus around key issues. It is anticipated that the community will provide input about priorities that should be addressed. The goal of a hands-on design session is to begin to build community support and develop a short and long-range vision for the future of the study area.
- c. Open Design Studios (Day Two through Four) – Following the hands-on design session on Day Two, the consultant Team will set up an Open Design Studio at a central location to refine ideas and continue to gather community input. Key stakeholders, staff, and members of the community will be encouraged to visit throughout the week as new issues come to mind and to check on the development of the plan concepts. The following tasks will be completed at the Open Design Studio:
 - 1) Establish Draft Vision – A key task accomplished during the charrette is defining a common vision for the future of the study area. Consultant team members will integrate the information gathered during the hands-on design sessions and technical meetings to establish a draft vision and goals to guide future improvements. This includes creating draft Illustrative plans and visualizations for opportunity areas that present future improvements. The illustrative plans and visualizations will illustrate long-term goals for the community such as design of streets, buildings, and public spaces. Renderings created using both digital and hand-drawn techniques will explore design concepts. The visualizations will demonstrate the possibilities for future improvements, allowing community members to evaluate the proposed “change-over-time” and provide quality feedback. The draft Illustrative Plans and visualizations will be accessible throughout the week to allow casual feedback and will be presented at the end of the charrette for more formal community input.
 - 2) Transportation Concepts – The mobility analysis begun prior to the charrette will be refined while working on site. Our team will ensure the mobility goals are incorporated into the overall urban design to improve streets. Possible solutions to create more connections to surrounding areas will be explored including additional bike and pedestrian infrastructure, equestrian trails and greenways, methods to provide more convenient connections to transit, and additional destinations within the study area.
 - 3) Economic Development – During the Open Design Studio, the Consultant Team will use the prior data and insights as part of the wider charrette and stakeholder conversations to confirm or change initial assumptions. This will be used to refine the solutions to better align with other elements and goals of the Plan. The economic and financial focus is centered around building buy-in and surfacing objections to include

only the best supported and publicly acceptable ideas for development concepts and redevelopment ideas into the plan.

- 4) Housing – Members of the Consultant Team will explore housing design options and possible policies and changes to regulations to allow development of housing types that respect and enhance existing examples. The goal will be to provide affordable housing for all sectors of the population, including low/moderate income households. The team will explore policies from inclusionary zoning to community land trusts to develop an initial set of possible strategies, policies, and regulations that will best meet the need to provide quality housing for all residents.
 - 5) Sustainability – During the Open Design Studio, the Consultant Team will discuss how change within the study area can use resources more efficiently. Urban design practices will be explored to improve the environment by monitoring and improving local air quality, reducing emissions and energy consumption, cleaning and maintaining waterways, reducing auto-dependency, and decreasing waste.
- d. Work-in-Progress Presentation (Day Five) – At the end of the charrette week, the team will present the accumulated work at a “Work-in-Progress” Presentation. Draft work will be introduced and discussed; various methods of community participation (such as online surveys, exit surveys, and small group conversations) will be used to gather feedback on the ideas presented, which will help in the refinement process.
 - e. At the conclusion of the Public Design Charrette and following the completion of a draft Master Plan, the Consultant Team will travel back to the study area for an advertised Board Workshop presentation. This presentation will allow for additional feedback from the Board and to give the Consultant Team any additional edits or revisions to include prior to the completion of the final deliverable.

C. Online Public Participation:

1. The consultant will provide deliverables, and interim deliverables, as appropriate, for the COUNTY to publish on its website.
2. As part of this Task the Consultant Team will facilitate an online map-based survey website using our proprietary online PublicCoordinate tool to gain online public input.
 - a. The survey will occur prior to the design charrettes to gain general input on existing conditions and on desirable outcomes. The survey will consist of one map-based interface, which will permit location-based comments and up to ten questions posed for input from the public.
 - b. The results of the survey will be documented in a memo providing the results and summarizing major findings for inclusion in the final Master Plan document.

TASK 3 – MASTER PLAN DOCUMENT

Following the completion of the above tasks, the Consultant Team will prepare a final US 27 Area Master Plan to include the following elements. Specific deliverable documents and/or items shall be provided in one or more of the following electronic formats MS Word, PDF format, web-compatible format, and ESRI ArcGIS where applicable

- A. Existing Conditions Analysis providing a summary analysis of other agency/jurisdiction plans, land uses, demographics, infrastructure analysis, interconnectivity, and multimodal needs.
- B. Economic & Market Feasibility Analysis providing a summary analysis of economic opportunities for the area with potential markets, along with identifying sites targeted as possible Planned Service Areas (PSA) location(s) to serve as a model projects.
- C. Master Plan document and components that identify market and investment methods, strategies, and actions to achieve the Master Plan and development goals. Plan components will outline, describe, and detail the process, outcomes and timelines of the tasks and work product components previously listed and shall consist of the following:
 - 1) Strategic Investment Plan unifying the findings of the prior work products identifying sites and infrastructure projects along with recommendations for needed updates for the following based on findings of the plan:
 - a. Comprehensive Plan
 - b. Land Development Code
 - c. Planned Service Areas (PSA's)
 - 2) Capital Improvements Program and Schedule in first 5-years, and then on 5-Year intervals for significant projects for the next 15 years, including but not limited to the following:
 - a. Program and Schedule will be provided in a cost feasible form and identify potential variations in the event of economic downturns or upticks that diminish or exceed expectations.
 - b. Opportunities for alternative funding sources to leverage and/or supplement COUNTY funds shall be identified, including correlation to specific identified projects as appropriate.
 - c. Potential funding opportunities and sources from government agencies and grant and/or loan programs.
 - 3) Opportunities and constraints map (presented in ArcGIS Urban or compatible with Urban)
 - a. Proposed government capital projects (COUNTY, TPO, State agencies, etc.)
 - b. Known private sector initiatives
 - c. Potential PSA(s)
 - d. Government owned properties, including any large retention ponds or public spaces
 - e. Governmental initiatives to encourage further improvements
 - f. Potential sites for implementation actions, including right-of-way alignments and/or acquisitions.
 - g. Other relevant parcels or projects that surface during the course of the study.
 - 4) Summary of public involvement and online survey data.

- 5) Creative Master Plan results and recommendations. This section will summarize the results, recommendations and findings of the Community Input and Master Planning Task (Task 2).
 - 6) Multi-modal circulation plan to support and provide proper access to and within the area while incorporating traffic calming measures and Complete Streets concepts, including, but not limited to, the following:
 - a. Pedestrian movement plan
 - b. Parking plan
 - c. Bike trails plan
 - d. Equestrian trails
 - e. Public Spaces
 - f. E-bikes and E-Scooters
 - g. Potential for golf carts
 - 7) Utilities, primarily central water and central sewer, needs and opportunities, including current and projected capacities, needs vs supply, retrofit and expansion needs, and coordination of supporting infrastructure.
 - 8) Identification of funding opportunities and partnerships that may be pursued by the COUNTY towards implementation of needed public investment and public/private partnerships.
 - 9) Phasing Program – immediate, short-term, long-range actions
 - 10) Capital Improvements Plan and schedule
- D. The final Master Plan will be transmitted to the COUNTY in the following manner:
- 1) High-resolution PDF Final Master Plan document.
 - 2) Electronic file transfer of sub-elements of the Plan scope (infrastructure maps, creative land plans, designs and renderings, survey data, etc.) in various file formats as appropriate to the document.
 - 3) Larger plans, renderings, etc. that are prepared as part of the Plan scope in electronic format.
 - 4) The Consultant Team will conduct one presentation of the Final Master Plan to COUNTY staff. The consultant Team will receive one round of comments from COUNTY staff and update the Master Plan one time for presentation to the Board of County Commissioners in an advertised Public Workshop.
 - 5) The Consultant Team will facilitate a joint presentation of the Final Master Plan, along with COUNTY staff, to the Board of County Commissioners as part of a regularly scheduled Board meeting.
 - 6) After delivery of the electronic PDF Master Plan, additional prints, plots, etc. are not included.

ADDITIONAL SERVICES (IF REQUIRED)

Services requested that are not specifically described above will be provided under a new and separate Agreement or can be performed on an hourly basis upon written authorization.

1. Additional Board of County Commissioner Workshops or Presentations that are not specifically identified in the above Scope of Services.
2. Meetings with Board members in 'one-on-one' meetings beyond those that would take place as part of Task 2.A.
3. Additional stakeholder meetings if requested by COUNTY staff after the seven-day charette is completed (Task 2).
4. Other meetings, coordination efforts, public meetings, etc. that are not specifically identified in the above Scope of Services.
5. Design of any improvements.

PART III – SCHEDULE

The ENGINEER will begin services within seven calendar days upon receipt of the approved purchase order from the COUNTY.

A detailed schedule will be provided to the COUNTY by ENGINEER at the Kick-Off Meeting. The schedule will be maintained by the ENGINEER and periodic updates provided to the COUNTY for the duration of the Project.

Attachments – Table A – Cost Estimate for Services

**TABLE A
COST ESTIMATE FOR SERVICES**

PROJECT: US 27 MASTER PLAN

DATE: MAY 2026

CLIENT: MARION COUNTY OFFICE OF THE COUNTY ENGINEER

KH PM: ELIZA JULIANO

BASIS FOR ESTIMATE: RFQ 23Q-087 COUNTY-APPROVED HOURLY RATES; CIVIL/SITE ENGINEERS FOR MISC PROJECTS

		DIRECT LABOR (LABOR-HOURS)											
		Principal Engineer	Project Manager (Registered)	Staff Engineer	GIS Technician	Senior Planner	Planner	Planner Technican	Clerical	Labor Hours	SUB (\$)	Labor Total	
TASK ID	TASK DESCRIPTION	\$245.00	\$210.00	\$125.00	\$90.00	\$130.00	\$100.00	\$80.00	\$60.00				
1	EXISTING CONDITIONS ANALYSIS												
-	MAPPING, ANALYSIS	6.0	20.0	10.0	60.0	60.0	60.0	10.0	0.0	226.0	\$ -	\$ 26,920	
-	MARKET ANALYSIS	6.0	6.0	0.0	0.0	80.0	120.0	0.0	40.0	252.0	\$ -	\$ 27,530	
-	INFRASTRUCTURE AND PUBLIC SERVICES	6.0	20.0	50.0	40.0	0.0	0.0	10.0	0.0	126.0	\$ -	\$ 16,320	
-	PSA PLANNING	0.0	0.0	0.0	10.0	20.0	40.0	10.0	0.0	80.0	\$ -	\$ 8,300	
2	COMMUNITY INPUT & MASTER PLANNING	30.0	80.0	80.0	80.0	100.0	160.0	120.0	80.0	730.0	\$ 141,445	\$ 84,750	
3	MASTER PLAN DOCUMENT	10.0	20.0	40.0	40.0	80.0	80.0	80.0	60.0	410.0	\$ 79,280	\$ 43,650	
	TOTALS:	58.0	146.0	180.0	230.0	340.0	460.0	230.0	180.0	1824.0	\$ 220,725	\$ 207,470	
											Grand Total: \$ 428,195.00		