

Attachment 1

SCOPE OF WORK

1. **GRANT AUTHORITY.** This Community Planning Technical Assistance grant is provided pursuant to section 163.3168, F.S., and Specific Appropriation 2220, Chapter 2016-66, Laws of Florida, to provide direct and/or indirect technical assistance to help Florida communities find creative solutions to fostering vibrant, healthy communities, while protecting the functions of important State resources and facilities.
2. **PROJECT DESCRIPTION:** Grantee shall use the funding under this Agreement to develop a *Community Life Cycle Plan* addressing the aged and elderly population of the City of Milton. Elements of the *Community Life Cycle Plan* shall include: (i) an elderly care resource profile; (ii) the creation and distribution of outreach material for the elderly; (iii) a strengths, weaknesses, opportunities, and threats (SWOT) analysis; and (iv) a final *Community Life Cycle Plan* based on the outcomes of the plan elements.
3. **GRANTEE RESPONSIBILITIES:** To perform the tasks and timely provide DEO with the deliverables identified in this paragraph and in the table in paragraph 5 below pursuant to the terms of this Agreement.
 - a. **Deliverable 1:** Grantee shall prepare a City of Milton elderly care resource profile as follows:
 1. Grantee shall develop a data base of elderly care facilities and services within the City of Milton and surrounding communities to include care facilities, hospitals, hospice care, and other local amenities including the built environment required to support an aged and aging population.
 2. Grantee shall prepare a map showing the locations of the facilities and services identified under paragraph 3.A.1. above.
 - b. **Deliverable 2:** Grantee shall create and distribute a survey and outreach material, prepare a report, and conduct a public meeting as follows:
 1. Grantee shall develop survey and informational outreach material for the purpose of gaining a better understanding of how the 65 years and older demographic feels about their status in the City and where they will be in the future.
 2. Grantee shall design the survey and outreach material to gather information on age, current living situation, future living conditions, savings and other retirement information, what elderly care services, if any, survey respondents currently utilize, and to illicit the respondents' opinions on availability of resources such as transportation, educational opportunities, recreation, and other similar resources that are or are not currently provided in the City of Milton.
 3. Grantee shall distribute the survey through a combination of phone calls, handouts, the City of Milton's webpage, and mailings. Newspaper articles and Facebook shall

also be used to provide notice of the availability of the survey to the 65 and older population. Grantee shall coordinate with existing advance age facilities, AARP, and other similar entities to obtain potential survey audience mailing lists and identify any other potential sources for disseminating information about the survey and the survey itself.

4. Grantee shall prepare a narrative report of the survey results, including the number of surveys sent out, the number or estimate of the number of persons age 65 and older in the City of Milton, and the number of survey respondents.
 5. Grantee shall conduct a minimum of one noticed public meeting to solicit public input on a Life Cycle Plan and any concerns and recommendations for the Plan.
- c. **Deliverable 3:** Grantee shall perform a strengths, weaknesses, opportunities, and threats (SWOT) analysis based on the data collected under Deliverables 1 and 2 and create a narrative report (SWOT Report) that includes the following:
1. **S = Strengths:** The current available services/facilities that provide for the aged in a valuable or in a meaningful way that could serve as a model to others; agencies for the elderly in the City of Milton; and volunteer groups that serve the aged population.
 2. **W = Weaknesses:** Services and facilities that are lacking in the City of Milton and factors hindering the growth of available services for the aged.
 3. **O = Opportunities:** Locations in the City of Milton that can grow or otherwise adjust to provide services to the aged; identification of partnerships that can be developed or grown with agencies identified in the Report to better serve the aged; identification of design features of the new Community Center that will incorporate services and facilities for the aged and elderly.
 4. **T = Threats:** Identification of factors that will not allow for or serve to hinder the expansion or growth of services for the elderly; whether the City of Milton's zoning allows for the construction of elderly care facilities in locations near other services the aged and elderly need; whether there are Florida Department of Transportation policies related to state roads that would prevent the movement of telephone poles out of a sidewalk; and whether and the extent to which funding is an issue in providing new elder care services.
- d. **Deliverable 4:** Grantee shall prepare the City of Milton 2025 Community Life Cycle Plan in narrative format based on the outcomes of Deliverables 1, 2, and 3 that includes the following:
1. Potential or recommended action steps to be taken by Grantee to better provide for Grantee's aging population.
 2. Weaknesses and threats to providing services and facilities to the aged and potential solutions to address those weaknesses and threats.

3. Identification of any provisions in the Grantee’s comprehensive plan and land development regulations that are barriers to providing services and facilities for the aged, and suggested amendments to the comprehensive plan or land development regulations to eliminate those barriers.
 4. Identification of policy improvements that are needed to provide services and facilities to the aged.
 5. Identification of any infrastructure improvements that are needed to serve the aged.
 6. Identification of current avenues for providing additional services and facilities to the aged.
 7. Goals for providing future services and facilities to the aged.
4. **DEO RESPONSIBILITIES:** To receive and review deliverables and, upon approval of deliverables, process payment pursuant to the terms of this Agreement.
5. **DELIVERABLES:** The specific deliverables, tasks, minimum level of service, due dates, and payment amounts are set forth in the following table:

Deliverables and Tasks	Minimum Level of Service	Payment Amount Not to Exceed	Financial Consequences
<p>Deliverable 1: City of Milton Elderly Care Resource Profile</p> <p>Grantee shall develop a data base of elderly care resources and a map in accordance with paragraph 3.A. above.</p> <p>Deliverable due date: January 30, 2017</p>	<p>Completion of Deliverable 1 as evidenced by all submission of all of the following:</p> <ol style="list-style-type: none"> 1. Report on the current status and inventory of available resources within the City of Milton and Santa Rosa County. 2. A map of the location of available facilities and services for the aged. <p>Grantee shall submit copies of all required documentation on paper or electronically in MS Word or PDF format, and all maps on a compact disc in PDF format with ArcGIS compatible shapefiles.</p>	<p>\$5,000</p>	<p>As provided in paragraph 14 below.</p>

<p>Deliverable 2: Survey and Outreach Material, Report, and Public Meeting.</p> <p>Grantee shall develop survey and outreach materials, prepare a report, and conduct a minimum of one noticed public meeting in accordance with paragraph 3.B above.</p> <p>Deliverable due date: March 1, 2017</p>	<p>Completion of Deliverable 2 as evidenced by submission of all of the following:</p> <ol style="list-style-type: none"> 1. Survey. 2. Narrative summary of survey results. 3. Outreach material. 4. Public meeting notice. 5. Public meeting agenda. 6. Written narrative summary of public meeting and input received. <p>Grantee shall submit copies of all required documentation on paper or electronically in MS Word or PDF format, and all maps on a compact disc in PDF format with ArcGIS compatible shapefiles.</p>	<p>\$10,000</p>	<p>As provided in paragraph 14 below.</p>
<p>Deliverable 3: SWOT Analysis and Report</p> <p>Grantee shall perform a SWOT analysis and prepare a SWOT Report in accordance with paragraph 3.C. above.</p> <p>Deliverable due date: April 15, 2017</p>	<p>Completion of Deliverable 3 as evidenced by submission of the following:</p> <ol style="list-style-type: none"> 1. SWOT Report. <p>Grantee shall submit copies of all required documentation on paper or electronically in MS Word or PDF format, and all maps on a compact disc in PDF format with ArcGIS compatible shapefiles.</p>	<p>\$5,000</p>	<p>As provided in paragraph 14 below.</p>
<p>Deliverable 4: Prepare the City of Milton 2025 Community Life Cycle Plan</p> <p>Grantee shall prepare the City of Milton 2025 Community Life</p>	<p>Completion of Deliverable 4 as evidenced by submission of the following:</p> <ol style="list-style-type: none"> 1. City of Milton 2025 Community Life Cycle Plan. 	<p>\$10,000</p>	<p>As provided in paragraph 14 below.</p>

<p>Cycle Plan in accordance with paragraph 3.D. above.</p> <p>Deliverable due date: June 12, 2017</p>	<p>Grantee shall submit copies of all required documentation on paper or electronically in MS Word or PDF format, and all maps on a compact disc in PDF format with ArcGIS compatible shapefiles.</p>		
<p>TOTAL PAYMENT AMOUNT NOT TO EXCEED: \$30,000</p>			

6. COST SHIFTING: The deliverable amounts specified within the Deliverables section above are established based on the Parties' estimation of sufficient delivery of services fulfilling grant purposes under the Agreement in order to designate payment points during the Agreement Period; however, this is not intended to restrict DEO's ability to approve and reimburse allowable costs, incurred by Grantee in providing the deliverables herein. Prior written approval from DEO's Agreement Manager is required for changes to the above Deliverable amounts that do not exceed **ten (10) percent** of each deliverable total funding amount. Changes that exceed **ten (10) percent** of each deliverable total funding amount will require a formal written amendment, as described in Section II.A., of the Agreement. Regardless, in no event shall DEO reimburse costs of more than the total amount of this Agreement.

7. INVOICE SUBMITTAL AND PAYMENT SCHEDULE:

DEO agrees to disburse funds under this Agreement in accordance with the following schedule in the amount(s) identified per deliverable in paragraph 5 above. The deliverable amount specified does not establish the value of the deliverable. In accordance with Section I.F.11, Funding Requirements of section 215.971, F.S., of this Agreement, Grantee's entitlement to retain funds paid by DEO is dependent upon the amount of allowable costs incurred and expended by Grantee in carrying out the Project.

Subject to the terms and conditions of this Agreement, invoices for each deliverable shall be submitted to DEO's Agreement Manager by U. S. Mail or by electronic mail either (a) with a deliverable, or (b) no later than seven (7) calendar days after written notice to Grantee that DEO has accepted the deliverable. Invoices are not required to be submitted through the Ariba Supplier Network described in Section I.G.2. of this Agreement. **Invoices shall be submitted in the format shown on Attachment 1-A hereto, an electronic copy of which shall be provided by DEO to the Grantee.**

Grantee shall provide one (1) invoice for each deliverable submitted during the applicable period of time. The invoice shall include, at a minimum, Grantee name and address, federal employer identification number, the Agreement number, invoice number, date of invoice, dates of services, deliverable number, description of task and amount being requested (See Attachment 1-A).

The following documents shall be submitted with the itemized invoice:

- a. For Tasks Performed by a Subcontractor: