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Proposed Scope of Services and Work Tasks
For the Development and Implementation of an
Interactive Growth Model Ver 3 (IGM Ver3)

Proposed agreement between Metro Forecasting Models, LLC (hereafter referred to as the CONSULTANT) and Charlotte County, Florida (hereafter referred to as the CLIENT) to provide services with the assistance of CLIENT's Staff for the development and implementation of an Interactive Growth Model Ver 3 (hereinafter referred to as the IGM)

The key steps in the development of the model include:

- Accurate population forecast (the Population and Housing Forecast Sub Model).
- Disaggregate the political subdivision into Zones.
- Current inventory of development and demographics by Zone.
- Design and develop criteria and formulas for spatial distribution of development over time.
- Buildout inventory of development by type and intensity and forecast of demographics by Zone.
- Data output by Zone for 5-year increments.

The IGM Land Use Model will disaggregate the study area into Zones, primarily Traffic Analysis Zones (TAZ) delineated according to the Metropolitan Planning Organization (MPO) or Census Blocks where appropriate or necessary. The IGM Ver 3 will forecast when and where development takes place as well as the population and housing types in the TAZ/Block zones from the **baseline year** (i.e. 2026) in 5-year increments to **buildout** (2030, 2035, etc.).

The IGM Land Use Model is ideal for determining the aggregate and spatial apportionment of land to achieve certain goals and maintain desired Levels of Service. The IGM, as a planning tool, provides the data and insight needed by planners and policy makers to balance the economy and encourage data driven decisions.

Study Area

The study area shall consist of the Charlotte County political subdivision boundary existing at the time of the execution of this contract.

Scope of Services

Work Task A

Interactive Growth Model Maintenance

The CONSULTANT will store, host, and maintain the Interactive Growth Model for the CLIENT. The CONSULTANT will update the Baseline and Buildout data and enter into the CIGM, calibrate the model and process the Commercial and Industrial submodels.

Update Report: After the annual update is performed, the CONSULTANT will provide an Update Report. The Update Report will describe the process and methodology of updating the baseline and buildout data, as well as provide a description of key findings and trends. The Update Report will serve as a benchmark to track spatial growth by area, vacant land by type, development trends, and key land use considerations.

Work Task B

Presentations

The CONSULTANT will prepare and present annual updates to the CLIENT in the form of a brief, formal presentation. The presentation will describe the process and methodology used to update the model and request CLIENT input. The presentation will also present key findings and trends discussed in the Update Report.

Work Task C

Alternative Development Scenarios

Alternative IGM scenarios give the CLIENT the ability to test different planning policies and gauge their impact. For example, planning policies can be tested (the Land Development Regulations) for the undeveloped areas near arterials/collectors, etc., to determine which policies are most efficient and reduce traffic in the roadway network. Different scenarios can be tested any time after the population and housing model has been processed.

Fee Estimate

2026 MFM Charlotte County IGM Update Fee Estimate

Project Personnel Hours Estimate

The table below shows the specific category of personnel, estimated hours, and cost per individual task, as summarized. This represents an estimate of the personnel required and hours to complete the project. Personnel used may shift based on project requirements while total labor costs will not change.

Task	Metro Forecasting Project Personnel (Projected Hours)					Totals
	Project Manager	Senior Data Analyst	GIS Data Analyst	Staff Planner	Model Technician	
Task 1 Update BL and BO. Summary report/slides.	53	40	150	40	0	\$ 40,025
Task 2 Meetings and Presentation	48		8	8		\$ 10,520
Task 3 Alternative Sceniaros	25	25			0	\$ 8,375
Total Hours	126	65	158	48	0	
Hourly Rate	\$ 175	\$ 160	\$ 125	\$ 140	\$ 100	
Labor Cost	\$ 22,050	\$ 10,400	\$ 19,750	\$ 6,720	\$ -	\$ 58,920