

Carlton Comprehensive Plan Update

Phase 1 Scope of Work

December 2021 – June 2022

Task 1. Project Management

Task 1.1 Project Kickoff

Prepare for and participate in a kickoff meeting with Carlton staff to review and refine the scope of work, deliverables, schedule and budget, and agree on roles and responsibilities and communications protocols. City staff will be responsible for providing direction and guidance throughout, reviewing deliverables, convening stakeholders, and organizing meeting notices and logistics. Agree on a preliminary list of key stakeholder groups and discuss of public engagement and communications tools and strategies.

Consultant Deliverables:

- *Kickoff meeting agenda and notes*
- *Refined scope of work, schedule, budget, roles and responsibilities*

Timeline: December 2021

Task 1.2 Project Administration

Hold bi-weekly project management phone calls to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed. Prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task, and track expenditures and hours.

Consultant Deliverables:

- *Bi-weekly call agendas and notes*
- *Monthly progress reports, invoices*

City Deliverables:

- *Participate in bi-weekly calls*

Timeline: December 2021 – June 2022

Task 2. Community and Stakeholder Engagement

Prepare a Community Engagement Plan to guide outreach efforts throughout the vision process. Encourage community-wide participation by providing many opportunities for public exchange in a variety of formats and locations. Capitalize on existing City mechanisms for community engagement; establish community engagement objectives; identify the diverse set of stakeholders; and describe the array of tools and activities best suited to inform and engage stakeholders. Provide a detailed written summary of community engagement results.

Also identify methods of communication to keep community members up-to-date with the project, and notifying residents, businesses and other stakeholders about opportunities to be actively involved in Comprehensive Plan update process. Conduct kickoff meetings with the Community Advisory Committee and Technical Advisory Committee to introduce the Comprehensive Plan process, discuss key issues and review draft Community Engagement Plan elements.

Public involvement and communications tools and activities include, but are not limited to:

Project Advisory Committees

Community Advisory Committee

Convene and facilitate two (2) meetings of a Community Advisory Committee (CAC) that represents a broad cross-section of community interests, formed by City staff with guidance from the team. The CAC will review and comment on work products, guide engagement efforts and help the 3J team host public outreach events and activities, act as liaisons to specific constituencies or interest groups, encourage community members to participate in the process, and act as champions of the ultimate Carlton Vision and Comprehensive Plan that emerges from this process. Develop a CAC charter that establishes roles, shared ground rules and decision-making procedures.

Technical Advisory Committee

City staff will form a Technical Advisory Committee (TAC) to work alongside the CAC, reviewing project materials and advising on technical issues throughout the project. The TAC will consist of agency partners and service providers and meet four times, often on the same day as the CAC.

For each CAC and TAC meeting, prepare agendas and other meeting materials. The City will be responsible for communication with members, coordinating meeting logistics, printing materials and preparing meeting notes.

Community Conversations and Interviews. A series of Community Conversations will prioritize “going to where people are” – both in meetings and online, focusing on the spaces where people gather and the channels through which they receive information. Community Conversations will be held with a broad spectrum of business, educational, neighborhood, civic and faith-based organizations.

In addition to conducting up to seven (7) conversations, 3J will prepare Community Conversation Kits for use by community members and train CAC members to conduct their own conversations. The conversations will provide the community with information about the project and engage them in discussion about what they value about Carlton today and what could make it a better place to live in the future. The City and 3J will work with local partners to reach communities that would not normally participate in the process.

Community Events. Community Events could include the Carlton Crush Harvest Festival, Fun Days, National Night Out, and others. Activities at Community Events may range from an informational booth to intercept interviews. Activities will be designed to create awareness of the project and engage youth and adults in identifying what they love about Carlton today and what they would change to make Carlton an even better place to live, work and play in the future.

Carlton Summits. Work with City staff and the CAC to host one (1) Carlton Summit. These fun and engaging community events are the main opportunities for Carlton community members to engage and share ideas with their neighbors face-to-face.

Online Engagement. Develop one (two) online engagements to supplement in-person public involvement activities. The engagements will provide an alternative avenue to comment for those who may not come to a meeting or feel comfortable voicing their opinions among others

Planning Commission and City Council Briefings

City staff and the 3J team will provide up to two (2) updates to Planning Commission and City Council throughout the process. These briefings are important touchpoints to ensure elected and appointed officials are engaged in the process and eventual recommendations are supported. The first briefing will coincide with CAC/TAC Meeting #1 introduce the Comprehensive Plan process, discuss key issues and review draft Community Engagement Plan elements.

Communication Tools

Work with City staff to use a variety of methods to notify residents about public events and other opportunities to be involved in the process:

- *Comprehensive Plan logo.* Create a project identity that is unique and compelling. This “look” will appear on all project materials and provide continuity and visibility for the Comprehensive Plan process.
- *Project Website.* Design and administer an informative and accessible website. 3J will develop content for the site including project overview and timeline, important contacts, schedules for public events, opportunities for public engagement, updates on the project’s status, and the ability to view or download documents.
- *Social media.* Provide City staff with content for their social media platforms, such as Facebook and Twitter accounts to increase project awareness and provide multiple avenues for community input.
- *Media contacts.* Prepare media releases to the Yamhill/Carlton News-Register and other local media outlets for the City to distribute.
- *Public information materials.* Prepare flyers, newsletters, facts sheets and other materials to educate and inform the public.
- *Electronic mailing list.* The City will maintain a database of e-mail addresses of people who express interest in the planning process. 3J will prepare e-blasts for the City to distribute to help notify people about events and activities. Interested parties will have several opportunities to join the mailing list, such as on the project website and at public meetings and events.

Consultant Deliverables:

- *Draft and final Community Engagement Plan*
- *Outreach and communications materials*
- *Project Website*
- *CAC/TAC Meeting #1 and materials*
- *Joint PC/CC Worksession #1 materials and presentation*

City Deliverables:

- *Coordinate CAC and TAC meetings*
- *Review and comment on Draft Community Engagement Plan*
- *Develop meeting notices and logistics for CAC/TAC Meeting #1*
- *Prepare CAC/TAC Meeting #1 summary*

Timeline: January – June 2022

Task 3. Background Report / Carlton 2042 Vision

3.1 Background Reports

Research comprehensive plan elements through the review of relevant documents, such as the existing adopted Comprehensive Plan, Transportation System Plan (TSP), Economic Opportunities Analysis (EOA), and Housing Needs Analysis (HNA). Collect relevant demographic and socio-economic data and work with City staff to reach out to appropriate City departments to learn about current activities and future plans.

Information from these sources will be used to prepare a background report for each comprehensive plan element that describes the element and underlying topics as they relate to the City of Carlton: What are the City’s assets? What trends are driving how the topic has changed and will continue to change the community? What are the opportunities and challenges to realizing the City’s vision for the topic?

The background reports will be written in accessible language and use a combination of narrative, maps, tables and graphics to convey key information. A portion of the information will ultimately be used in the Comprehensive Plan itself. The consultant team also will prepare a one-page, infographic-rich topic profile to make the information more accessible to the public. This information will be compiled into a Community Profile for use at Carlton Summit #1 and distributed widely through various online and City mechanisms.

Consultant Deliverables:

- *Draft and final background reports*
- *Draft and final Community Profile*

City Deliverables:

- *Compile relevant data and plans for inclusion in the Background Reports*
- *Review and comment on Draft Background Reports*
- *Review and comment on Draft Community Profile*

Timeline: January – April 2022

3.2 Carlton 2042 Vision

Concurrent with the collection and analysis of background information, the first round of outreach activities, as described in the Community Engagement Plan, will focus on the Carlton 2042 Vision. Community members will be asked open-ended questions about what they like about Carlton today and what could be improved in the future. The questions will be extended to align with Oregon Statewide Planning Goals/comprehensive plan elements, such as housing, economic development and parks and recreation. Organize the information gathered into Comprehensive Plan “topic areas”. This information will be the foundation of the Comprehensive Plan Vision.

Following review from City staff, revise the background reports, topic profiles and draft Comprehensive Plan Vision. These materials will be refined before presentation to the CAC and TAC for their revisions. Host Carlton Summit #1, where community members will review and comment on the draft Vision Statement and participate in discussions to identify preliminary goals for each topic area. This hands-on event will combine education and dialogue about the big questions facing the City, such as housing, livability, economic development, natural resource preservation and conservation, among others. The Summit will be supplemented by an online tool for community input.

Consultant Deliverables:

- *Draft Vision Statement*
- *CAC/TAC Meeting #2 and materials*
- *Joint PC/CC Worksession #2 materials and presentation*
- *Carlton Summit #1, materials and media content*
- *Online questionnaire to collect additional community input*

City Deliverables:

- *Review and comment on Draft vision*
- *Develop meeting notices and logistics for CAC/TAC Meeting #2*
- *Prepare CAC/TAC Meeting #2 summary*
- *Launch Carlton Summit #1 media content, manage meeting logistics*
- *Review online questionnaire*

Timeline: March – June 2022