

Carlton Comprehensive Plan Update

Phase 2 Scope of Work

July – December 2022

Task 1. Project Management

Task 1.1 Phase 2 Kickoff

Prepare for and participate in a Phase 2 meeting with Carlton staff to review and refine the scope of work, deliverables, schedule and budget. City staff will be responsible for providing direction and guidance throughout, reviewing deliverables, convening stakeholders, and organizing meeting notices and logistics.

Consultant Deliverables:

- *Phase 2 kickoff meeting agenda and notes*
- *Refined scope of work, schedule, budget*

Timeline: July 2022

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: July – December 2022

Task 2. Community and Stakeholder Engagement

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). 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.

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 summaries.

Community Events. Use a variety of activities ranging 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. 3J staff and CAC members will be the primary staff at these events and 3J will participate in up to five (5) events.

Carlton Summits. Work with City staff and the CAC to host two (2) Carlton Summits. 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 up to two (2) 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) regular 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.

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:

- *Project Website Updates.* The 3J Team will periodically update the project website.
- *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:

- *Outreach and communications materials*
- *Project Website*

City Deliverables:

- *Coordinate CAC and TAC meetings*

Timeline: July – October 2022

Task 4 Goals and Policies

Use information gathered in Task 3 to make needed revisions to the Vision, and draft broad goals for the various Comprehensive Plan elements. The second round of outreach will focus on identifying community priorities based on the overarching Vision and draft goals. Vet and refine draft goals with the CAC and TAC. At Carlton Summit #2 and through an online engagement tool, participants will validate the vision and draft goals, and identify ideas and approaches that will shape policy concepts and implementation strategies. Topics may include ideas around: housing affordability, parks and amenities, green energy and water conservation, digital infrastructure, multimodal safety and connectivity, and civic engagement. Following Carlton Summit #2, work with City staff, the CAC and TAC to refine the goals and policies that will form the Comprehensive Plan.

Consultant Deliverables:

- *Final vision statement*
- *Draft goals and policies*
- *CAC/TAC Meeting #3 and materials*
- *Joint PC/CC Worksession #3 and #4 materials and presentation*
- *Carlton Summit #2, materials and media content*
- *Online questionnaire to collect additional community input*

City Deliverables:

- *Review and comment on draft goals and policies*
- *Develop meeting notices and logistics for CAC/TAC Meeting #3*
- *Prepare CAC/TAC Meeting #3 summary*
- *Launch Carlton Summit #2 media content, manage meeting logistics*
- *Review online questionnaire*

Timeline: July – August 2022

Task 5. Comprehensive Plan

Create a Comprehensive Plan document that compiles the background reports, vision, goals and policies for each element and ensure that the policies are aligned with Oregon Statewide Planning goals.

In addition to developing policies, work collaboratively with City staff to identify any implementation strategies, where applicable, to be compiled in a separate document and used as a framework to guide the implementation of the new Comprehensive Plan in subsequent phases of work.

The Comprehensive Plan document will be visually engaging and easy to read to clearly communicate and illustrate information. The draft Comprehensive Plan will be presented to the CAC and TAC at their final meeting for their review and comment. Carlton Summit #3 will use an open house format to provide the public with a final opportunity to review and comment on all aspects of the draft Comprehensive Plan. Following Summit #3, we will refine the Plan to reflect community input.

Consultant Deliverables:

- *Draft and revised Comprehensive Plan*
- *CAC/TAC Meeting #4 and materials*
- *Carlton Summit #3, materials and media content*
- *Online questionnaire to collect additional community input*
- *Implementation Strategies Memo*

City Deliverables:

- *Review and comment on draft and revised Comprehensive Plan*
- *Develop meeting notices and logistics for CAC/TAC Meeting #4*
- *Prepare CAC/TAC Meeting #4 summary*
- *Launch Carlton Summit #3 media content, manage meeting logistics*
- *Review online questionnaire*
- *Review and comment on Implementation Strategies Memo*

Timeline: September – October 2022

Task 6. Adoption

Use a thoughtful and measured adoption process is needed to facilitate their understanding, input and support. Present the Comprehensive Plan in two groupings of chapters to be reviewed at a series of joint Planning Commission and City Council work sessions. Once final refinements are made, a final draft of the Comprehensive Plan will be presented at two hearings; one for the Planning Commission and one for the City Council. Having already reviewed the draft policies and background information for each of the topic areas, these bodies will be familiar with the complete Comprehensive Plan document for adoption.

Consultant Deliverables:

- *Two Planning Commission/City Council work sessions and presentations*
- *One Planning Commission hearing and presentation*
- *One City Council hearing and presentation*

City Deliverables:

- *Prepare all relevant meeting notices, staff reports and ordinances*
- *Participate in Planning Commission and City Council Adoption Hearings*

Timeline: November – December 2022