

# ATTACHMENT A: SCOPE OF WORK

The scope of work is organized into six overarching tasks:

- Task 1: Project start-up
- Task 2: Conduct visioning exercises
- Task 3: Review & analyze Coupeville context
- Task 4: Prepare comprehensive plan draft
- Task 5: Prepare SEPA documentation
- Task 6: Refine the comprehensive plan draft and assist with the adoption process

The projected timing of the project is listed after each task or subtask.

## Task 1: Project start-up

This and most other tasks include multiple activities:

### *1A - project kickoff (September)*

MAKERS will host a remote kick-off meeting with Town staff to confirm project scope, schedule, roles, and communication protocols. Prior to the session MAKERS will send the City a list of requests for all relevant background information necessary for the project, including adopted plans, GIS data and maps, and other relevant documents. During this session we will identify the major issues, high priority plan updates, potential SEPA strategies, and project objectives. We will discuss outreach goals and key stakeholders and a framework for community engagement. A master project schedule and plan for ongoing coordination will be established to ensure the plan update process complies with Town needs, local procedures, and state requirements.

Representatives from each consultant team member will attend the remote kickoff event.

### *1B- town engagement plan (September)*

MAKERS will prepare an engagement plan built on a broad and inclusive engagement strategy. Because the project's available resources are limited, the plan will prioritize activities and, where possible, facilitate staff's lead or management of certain activities. Suggested components and activities of our public involvement plan are detailed below.

**Interviews with key stakeholders.** This task budgets up to six remote video interviews. These could be Town Council or Planning Commissioners, or community stakeholders that staff feel can provide us with context on current Coupeville issues, opportunities, and priorities.

Assumption: Town staff will organize and schedule the interviews per MAKERS available dates/times.

**Project website and interactive online engagement tools.** This will allow people to participate in plan development at their own time and pace. Town staff will manage a project page on the Coupeville website, and we will assist with the approach and content for this platform on an ongoing basis. During early stages, the page content will include background on the project need, goals, and schedule, and over time it will evolve to provide a clearinghouse of project documents and information in a visual and accessible manner.

**Major public meetings and workshops.** Considering limited budget resources, the project scope, and the evolving pandemic context, most or perhaps all of these meetings are likely to be remote. We've clarified (remote vs in-person) the anticipated meeting form within each task.

- Kick-off Planning Commission or Town Council meeting (Task 1C)
- Visioning meeting #1 - Planning Commission (Task 2B)
- Visioning meeting #2 – Town Council (Task 2C)
- Town workshop #1 – Project introduction, present current conditions, issues, opportunities, and draft vision statement, explore goals and objectives (Task 3D)
- Draft check-in #1 - Planning Commission or Town Council (Task 4)
- Draft check-in #2 - Planning Commission or Town Council (Task 4)
- Town workshop #2 – present and evaluate first draft comprehensive plan (Task 4)
- Adoption meeting #1 – assist staff with Planning Commission or Town Council meeting (Task 6)
- Adoption meeting #2 – assist staff with Planning Commission or Town Council meeting (Task 6)

### ***1C– kick-off meeting with Planning Commission or Town Council (September – October)***

Such kick-off meetings with either Planning Commission or Town Council (remote) will be used to introduce the team and ask public officials what elements of the comprehensive plan update are most important to them. This could include particular goals or policies are aspects of the Town's engagement process.

### **Task 1 Deliverables**

- Refined schedule
- Project website
- Town engagement plan

- Meeting notes (Tasks 1A & 1C)

## Task 2: Conduct visioning exercises

### *2A – on-line visioning survey (September - November)*

We suggest a simple online survey that asks Town residents their “Loves”, “Concerns”, and long term “Hopes” (5-20 years) for Coupeville. We’ll likely add other strategic questions. We will collaborate with staff in crafting the survey (we’ll use input from Task 1 activities in assisting with this). Ultimately, this will be useful in formulating the updated vision statement in addition to more expanded “Values” statements (see Anacortes example inset).

### *2B & 2C planning commission and/or town council meetings (October – January, 2022)*

After survey results are in, we suggest two follow up meetings (remote), preferably with the Planning Commission and Town Council. Here we will summarize results of the survey and ask public officials the same love/concern/hope questions. Using the survey results, craft one or more very rough vision statements that we’ll conduct editing exercises with public officials and other participants. We will collaborate with staff in preparation for these meetings.

### **Task 2 Deliverables**

- Survey results/summary
- Draft vision statement
- Rough outline for values statements

## Task 3: Review & analyze Coupeville context

Simultaneous with Task 2, the team will begin its work on the tasks noted below. The team will conduct video conference calls with staff every two to three weeks during this time to discuss progress and ask questions.

### *3A –plan audit (September - November)*

The team will review the plan and all of its elements. We’ll examine the plan with both a big picture lens (overall look, usability, organization) and a detailed lens (mostly zooming in the goals and policies). The audit will specifically evaluate the following:

Plan inventories:

- Identify inventory information that is out of date or incorrect, and information available or needed to address it.

- Identify opportunities for text revisions to clarify meaning or use of maps and graphics to more efficiently convey information.

Goals and policies:

- Identify new and revised goals and policies and those that can be deleted based on the Town's updated context plus updates to enhance the plan's usability and aid in implementation.

### ***3B –data collection and review (September - November)***

Team members will collect and review data necessary for the plan update process, including Town plans, studies, and tabular and spatial data. The team will also collect data from outside sources where necessary to include the most up-to-date information in the Comprehensive Plan. The RFP provides clear guidance on key elements to review:

- Land capacity analysis/zoning regulations
- Housing inventory/needs
- Economic stability trends and needs
- Transportation facilities and needs
- Existing and forecasted capital facilities/needs, parks, and governmental services
- Existing and forecasted utilities/needs
- Town design guidelines and historic preservation
- Natural systems and shoreline-related policies/best available science and integration of approved Shorelines Master Program

### ***3C –update base maps***

MAKERS will use available data to craft new GIS base maps for use in the plan. These will be clear and simple maps crafted to clearly communicate key information.

### ***3D –Town workshop #1***

The team will present Task 3 audit and context findings, online survey results, and the draft vision statement and conduct multiple exercises to identify key issues, opportunities, and priorities.

### **Task 3 Deliverable**

- Draft summary of current conditions to be integrated into the updated comprehensive plan.
- Meeting and workshop presentation materials and corresponding summary of input from each.

## Task 4: Prepare comprehensive plan draft

Using input from Tasks 2 and 3, the team will meet with staff to brainstorm key refinements to existing goals and policies. Coordination with the Planning Commission (we've budgeted two meetings to be spaced at strategic times during the task) in this process also will be essential to share preliminary thoughts and provide direction. While our plan will update all 11 elements as noted on page 5 of the RFP, below are preliminary thoughts involving key plan components and elements. The team will maintain coordination video calls every two to three weeks during this task. Town staff will provide data/information relevant to the plan update, provide draft support, and will review preliminary drafts in detail.

### *Plan organization & template (October - January, 2022)*

MAKERS will create a design template, organization, and approach for the plan that's consistent and easy to use. This includes a master style guide to ensure consistent terminology and writing conventions. The background information, goals, and policies will be supported with clear maps and plenty of graphics. The design template and styles will also be used for workshop posters and other project documents and promotional materials.

### *Plan Foundation & Vision (November - May, 2022)*

MAKERS will prepare a plan introduction that identifies the vision and character of the community and shows how the plan will be organized.

### *Land use element (November - May, 2022)*

BERK will update land use conditions as well as population, employment, and future land use capacity analysis. MAKERS will draft clear, concise goals and policies to reflect Coupeville's desired future. Strategic updates to the future land use map could be a component of this update — perhaps including updated designations and boundaries. Another key component will be the close examination of the land use categories, which summarize the purpose, principal uses and densities, and implementing zoning for each designation. The updated goals and policies should also integrate community design preferences as well as zone-specific preferences.

### *Housing element (November - May, 2022)*

MAKERS and BERK will prepare Housing Element update, including needs and characteristics inventory that will meet GMA and Countywide Planning Policy requirements. As part of the inventory, the team will review the capacity for different types of housing in Coupeville and how they relate to the Town's needs.

The team will draft goals and policies to reflect local housing needs and address the region's growing demand for affordable housing. Key topics/emphasis we anticipate are

housing supply and variety, Town character, housing affordability, special needs housing, regional collaboration, and monitoring.

### *Transportation element (November - May, 2022)*

Transpo Group will update the Transportation element consistent with the Land Use element update to ensure consistency of approaches and adequacy of plans and facilities. Primary elements of Transpo's scope of service include developing traffic forecasts, analysis of intersection and roadway needs at key locations, and updating the long-range transportation system plans and improvement projects, including bicycle and pedestrian improvements. Consistent with current GMA requirements, Transpo will perform an audit of the existing Transportation element document to identify goals and policies, as well as technical sections that are in need of updating. They will then coordinate with the consultant team and Town staff to assign roles and responsibilities for updating these sections. It is anticipated that the update of the Transportation element will be a collaborative effort that is more of a "redline exercise" that leverages the existing plan document organization and narrative.

### *Natural systems element (November - May, 2022)*

The Natural Systems element currently consists one goal and eleven policies. In consideration of the community's vision, The Watershed Company will review the goal and policies and suggest revisions, including potential new policies. Further, the team will discuss with the City whether additional content might benefit this element. The additional content might include content that is currently located in other parts of the plan, such as the "Plants and Animals" section in the Land Use Element. Additional content might also include new content such as a discussion of ecosystem services or the impacts of climate change. The Watershed Company will also help integrate the recently updated Shoreline Master Program.

### *Capital facilities element (November - May, 2022)*

Capital facilities planning provides the opportunity for the community to invest in projects that implement their vision and allows the Town to build its future. BERK will work with Town departments to gather inventory information and policy language for the updated element. This will include identifying changes to the financial plan using the Town's adopted level of service standards to pay for correcting existing deficiencies and constructing new facilities over the short term planning horizon. A new GIS-based map of existing capital facilities may be provided depending on available data and budget.

### *Utilities element (November - May, 2022)*

BERK will integrate the Town's Comprehensive Sewer Plan and Water System Plan and other relevant Town and County documents into the Utilities element. This will demonstrate the

geography of services available today and the planned services and service area, the population considered in the plans, and the relationship to future land use and growth.

### *Historic Preservation element (November - May, 2022)*

MAKERS will review the current element for conformance with GMA and identify minimal efforts to achieve consistency with other elements and development regulations. Updating this element requires collaboration with the County and the Ebey's Landing National Historical Reserve Trust Board and potentially updating the Design Guidelines. For this reason, Town staff anticipate minimal revisions at this time.

### *Park, Recreation & Open Space element (November - May, 2022)*

BERK will update the inventory and goals and policies using available information from Town, County, and State plans and studies to address new facilities and services, and to identify the Town's levels of service and other objectives for its residents and visitors. A new GIS-based map of existing park and trail facilities may be provided depending on available data and budget.

### *Economic Stability element (November - May, 2022)*

Berk will update with current economic and market data to support economic growth, tourism and the quality of life in the Town.

### *Government and Services element (November - May, 2022)*

BERK will update the Government and Services element to reflect the Town's fiscal policies and address public services not otherwise captured in the Capital Facilities element or Parks, Recreation, and Open Space element. These policies may be combined into another element based on the initial plan audit and template. Town staff anticipate minimal revisions at this time.

### *Development regulations updates (March - May, 2022)*

The plan will include strategic recommendations for Title 16 development regulations updates based on Land Use and Housing Element goals and policies and our brief analysis of the existing code.

The Town's critical areas regulations are key to protecting natural systems. Watershed will review the Town's critical areas regulations for compliance with GMA using checklists from the Department of Commerce related to critical areas. It is assumed that review using the checklists will be sufficient to update the critical areas regulations and that additional review and documentation of best available science will not be needed. Any updates to the critical areas regulations would be limited to those needed to address minor shortcomings identified during checklist review. While not anticipated to be required, if updates to regulations for geologically hazardous areas, frequently flooded

areas, or critical aquifer recharge areas are deemed necessary, such updates would not be included under this scope if outside of the technical capability of The Watershed Company.

### *Town workshop #2 (May, 2022)*

Once the first draft has been completed and published, the team will conduct a Town workshop to present and evaluate the plan's goals and policies. This workshop will be in-person if desired and pandemic restrictions allow. A combination presentation/open house format usually works best at this juncture. The presentation allows the team to provide an overview of key features, goals, and policies – and pointing out special provisions that warrant close review. The open house allows for casual drop ins as well as more detailed discussions with community members on topics they are most interested in.

### **Task 4 Deliverables**

- First draft Comprehensive Plan (11 elements).
- Meeting and workshop presentation materials and corresponding summary of input from each.

### **Task 5: Prepare SEPA documentation** (May - September, 2022)

BERK will lead the effort in preparing necessary programmatic SEPA analysis and documentation for adoption of the updated plan. Given the nature of the Town, this plan update, and available budget resources, this scope anticipates preparation of an expanded SEPA Checklist.

### **Task 5 Deliverable**

- Expanded SEPA checklist (and/or other SEPA analysis)

### **Task 6: Refine the comprehensive plan draft and assist with the adoption process** (June - November, 2022)

Consultant team guidance at the adoption phase can be critical in clarifying concepts, answering technical questions, and aiding in the necessary refinement of key goals, policies and concepts. This is helpful to ensure internal consistency, to point out implications of various options, provide feedback on engagement findings on the subject topics, and to help ensure that policy language successfully bridges that delicate gap of being specific enough to be useful, but not overly specific as a regulation.

The budget assumes the consultant team will be available for attendance at up to two Planning Commission and/or City Council meetings during the adoption process, and



may be available for some remote support of other meetings that are led by staff. The team will maintain coordination video calls every two to three weeks during this task.

### **Task 6 Deliverable**

- Refined plan draft based on Town Workshop #2
- Meeting presentation materials and technical memos (as needed)
- Adopted comprehensive plan

# BUDGET

Adjustments to the budget may be made via email confirmation with Town staff provided such changes do not increase the total consultant budget amount. The travel expenses assume transportation costs and associated meals for an estimated number of in-person trips by the consultant team.

TASK	MAKERS		BERK	Watershed	Transpo	AMOUNT
	Partner	Planning Support	Growth Analysis/Policy	Environmental Analysis/Policy	Transportation Analysis/Policy	
Team member role						
Billing rate (blended)	\$215	\$130	\$150	\$160	\$200	
<b>1</b> Project start-up <i>incl. initial meetings with staff and public officials, field work, and development of a project community engagement plan</i>	15	15	14	3	3	\$8,355
<b>2</b> Conduct visioning exercises	20	20	6	2	2	\$8,520
<b>3</b> Review and analyze Coupeville context <i>incl. current conditions, existing comprehensive plan and related documents</i>	14	40	55	28	28	\$26,540
<b>4</b> Prepare comprehensive plan draft	34	90	48	22	24	\$34,530
<b>5</b> Prepare SEPA documentation	2	6	40	8	12	\$10,890
<b>6</b> Refine the comprehensive plan draft and assist with the adoption process	18	18	12	6	6	\$10,170
<b>Subtotal</b>	<b>103</b>	<b>189</b>	<b>175</b>	<b>69</b>	<b>75</b>	<b>\$99,005</b>
					Travel Expenses	\$900
					<b>TOTAL</b>	<b>\$99,905</b>