

Visioning Scope of Work

Approach

Effective public involvement is crucial in preparing and implementing a comprehensive plan. This contract focuses on refinement of the countywide vision, a document that will underpin the plan's policy updates and, more importantly, give voice to the community's highest aspirations in setting direction for the county's future. The consultant will dedicate significant effort to ensure the public's involvement in the process is meaningful and effective. This will include:

- > **County reporting and input** – The consultant will hold regular conference calls with the County's project manager to collaborate on the vision's preparation. The consultant will hold these types of calls to keep the projects on track.
- > **Public meetings** – The consultant will design a series of public meetings that will keep participants engaged and involved. A "vision capsule" will be used to consolidate vision development during a targeted time span, often over the course of a week or two. The consultant will use this time to vet the existing vision, playing out the capsules to generate, review, evaluate and pick from the suggestions that emerge during concentrated engagement. Evening workshops on ferry-served islands will refine the community vision, test the plan's preferred strategic direction and focus on the relationships between the vision and the emerging resource lands strategies.
- > **Website** – The consultant will create a dedicated web presence, providing project calendars, workshop summaries and results, relevant news items, interactive questionnaires, links and community comment opportunities. We expect to build one for San Juan County as a single source for all comprehensive plan update-related activities.
- > **Survey** – The consultant will prepare and utilize a statistically valid survey.
- > **Report** – The consultant will compile, analyze and summarize community input resulting from the PI Plan in a clear and visual report.
- > **County Council and Planning Commission briefings** – The consultant will prepare materials for one briefing (each) of the Council and Planning Commission.
- > **Schedule and status reports** – The consultant will provide a schedule of tasks and monthly status reports on project progress, submitted with invoices that track progress by project task.

Tasks

Task 1 – Develop a Public Involvement Program Including Engagement Strategies, Materials and Communications/Media Plans

The consultant will work with staff to select from a menu of outreach and engagement strategies, weaving the selected approaches into a compelling, progressive and innovative program. The consultant will establish a program, estimated required budget and schedule in this task, identifying when events will occur and what type of collateral outreach material will be produced.

Deliverables:

- Menu of outreach and engagement strategies
- Two meetings with County Staff to coordinate project (these may be telephonic)
- One presentation to County Council prior to finalizing the Public Involvement Program and Communications/Media Plan
- Draft and final Public Involvement Program and Communications/Media Plan

- Outreach materials
- Draft and final schedule, including event schedule
- One round of review each for the program and the schedule (with staff)

Task 1.2 – Vision Capsules

The consultant will vet the existing plan’s vision and establish a vision tree based on what is in the books today. The vision tree will constitute primary direction for the plan’s various elements, providing the consultant and the community with the guiding principles to which the plan must adhere. Having it described as a tree will also allow us to demonstrate how revisions to vision components may impact policy and implementation actions and how changes to one part of the tree may influence changes in other parts, too. This process will inform the Vision Capsules. The consultant will conduct with community members, targeting those portions of the vision that seem most due for update or revision.

The consultant will design and run multi-day intensive vision workshops, featuring meetings with the community on each of the three ferry-served islands (San Juan, Lopez and Orcas) and – if possible – on non-ferry-served islands. The consultant will start with the existing community vision, frame it within existing conditions and our preliminary forecasts of future growth and then solicit community suggestions on how the vision should be revised in response. The consultant will produce an updated vision tree at the conclusion of the capsules, establishing the core principles that will direct the planning process from this point forward.

The consultant will design these capsules to be fun, engaging and active events, with a daytime tent erected for two days in visible public places to generate vision conversations. The studio” events and the outdoor format will generates spontaneous, meaningful conversations with tangible results, where the public engages with the consultant team at a pace and in a location that is both comfortable and convenient. Where the capsule occurs on a ferry-served island, it will be followed by an evening community workshop.

Deliverables:

- Draft and final vision tree establishing core principles with supporting documentation
- Three 2-day intensive vision workshops (one each on San Juan, Lopez and Orcas)
- Workshop materials
- Two meetings with County Staff to coordinate (telephonic)

Task 1.3 – Survey

The consultant will design and administer a statistically valid survey to test the working vision, ensuring that the results from the vision capsules and community workshops is tracking with the larger community’s aspirations. The purposes of this survey will be to affirm community acceptance of what has come out of the work done to this point, providing a level of comfort for decision makers as they prepare to commit to this very important policy statement. The consultant will also interpret the survey’s results, analyzing responses in a variety of ways to identify trends, understand potential ramifications to the working vision and inform next steps in vision refinement and presentation.

Deliverables:

- Draft and final survey
- One round of review and edits
- Survey administration
- Results report - Twenty-five (25) hard copies and electronic copies in Word and PDF

Task 1.4 – Dedicated website

The consultant will create a website including an accessible calendar, public process records, exercises, project news, interactive discussions, helpful links and contact information. The consultant will use social media, if approved by agency legal staff, to encourage wider and less formal distribution of project news, dialogue, and events. The website will be up and operational within two weeks of our notice to proceed and will run through the project's duration. The website will integrate the vision development project with the resource lands project work, putting this Comprehensive Plan update information in a single place.

Deliverable:

- Website and maintenance of updates throughout the project

Task 2 – Initial coordination with County

The consultant will work closely with the County to ensure the public information plan, communications plan and media plan are achievable within the County's resources and overall community context. This process will generate details on venue location, overall costs associated with the engagement process, expected outcomes and a final project schedule. This will augment the County's public involvement plan for its comprehensive plan update, ensuring the techniques and approaches are consistent with adopted policy and the intent of the GMA.

Task 3 – Community engagement and continued coordination with County

The consultant will execute the approved PI Plan and engage the community, utilizing their important input. The consultant will set regular status update conference calls with the County to ensure continued and sustained progress, particularly addressing coordination issues with the other concurrent Comprehensive Plan planning tasks related to resource lands. Knitting together all three projects will require frequent and detailed communication, with results from the vision work informing virtually every element of the resource lands tasks.

Deliverables:

- Executed Public Involvement Plan
- Meetings and coordination with the County

Task 4 – Report

The consultant will compile, analyze and summarize community input resulting from the PI Plan in a clear and visual report that will allow the County to make meaningful recommendations to update the Vision and goals and policies. Information will be presented in a way that is easy to understand and implement, because the end goal is a Comprehensive Plan that is usable and practical.

Deliverables:

- Twenty-five (25) hard copies; and
- Electronic copies in Word and PDF of a report summarizing community input.

Task 5 – Planning Commission/County Council Briefings

The consultant will brief the County Council and the Planning Commission (two daytime meetings total) to discuss the outcome of the vision process. These meetings will ideally be scheduled to coincide with delivery of draft resource lands strategies to underscore the relationship between the vision and the County's more specific land management policies.

Deliverables:

- One daytime presentation to the County Council
- One daytime briefing to the Planning Commission

Schedule

A detailed schedule shall be mutually agreed upon by the parties after execution of this contract. The contract work shall begin directly after the contract execution and end by December 31, 2017.