

Schedule B

Town of York, ME

Comprehensive Plan Update Scope of Work

2/8/2021

1 - Project Goals

Provide a Comprehensive Plan Update that provides the following:

- A Comprehensive Plan that meets criteria the State of Maine Planning Office uses to review community comprehensive plans for consistency with the goals and guidelines of the *Growth Management Act* (30-A M.R.S.A. §§ 4312 - 4350) and for certification under §4347-A(2).
- A user-friendly, concise, and graphic update to the existing Comprehensive Plan.
- An overall vision for the future of the town and concrete goals for achieving this vision.
- Concrete, data-driven strategies to realize the Town's goals and clear metrics to measure success in the coming years.
- Plan elements that are reflective of Town goals of social equity, economic development, and public health and safety.

2 - Proposed Planning Process and Structure

In order to maximize the outcomes, CivicMoxie proposes to provide an integrated project planning process and approach that yields two independent plans (Comprehensive Plan Update and Climate Action Plan). The Climate Action Plan (12 month planning process) will be completed first in order to inform the Comprehensive Plan (18 month planning process). Our goal is to streamline the planning process and Town project management to create efficiencies of scale and optimal public involvement by reducing the risk of planning/meeting fatigue of residents and other stakeholders. By completing the Climate Action Plan (CAP) first, information and key goals from this Plan can be used to inform Comprehensive Plan elements, where appropriate. The Comprehensive Plan will use the Climate Action Plan in the same way it will use other Town plans or reports to inform goals and strategies in the Plan. Detailed CAP information and recommendations will remain in the CAP, where they are more appropriate.

Contract and organizational structure:

- One contract including all scope of work items for both plans and one integrated schedule.
- Two separate plans (Comprehensive Plan and CAP).
- One Town Project Manager (Town Planning Director).
- Two Steering Committees (one for the CAP and one for the Comprehensive plan) that will work together when appropriate to allow CivicMoxie to coordinate and align community outreach and engagement and other work whenever possible). The Committees shall reflect the diversity of interests and demographics of the Town including criteria that meets the requirements of both the Comprehensive Plan and Climate Action Plan processes:
 - Members representing the Board of Selectmen and Planning Board

- Members representing the York Energy Steering Committee (ESC)
- Broad range of stakeholders with varied technical and sector expertise
- Broad and inclusive representation of the community:
 - public/private interests
 - geographic diversity
 - business and organizational segments
 - age, income, race, and gender diversity
- Working Group(s) for the Comprehensive Plan topic areas and for the CAP topic areas (number of groups TBD).

The Planning Board will serve as the coordinating body for both plans. CivicMoxie will guide the planning process and the Town’s Planning Director will serve as client Project Manager and will partner with CivicMoxie to lead the planning process.

Town Responsibilities

The Town will provide the following items to the consultant to facilitate the creation of the Climate Action Plan:

- A project manager – The Planning Director.
- An internal cross-departmental group of Town employees that will serve as a sounding board for the Comprehensive Plan (this will involve approximately two meetings during the process for early input and later in the planning schedule for feedback on draft goals and policies for both the Comprehensive and Climate Action Plans.
- Copies/access to all relevant existing Town plans and studies. Assistance gathering relevant State and regional studies and plans.
- Access to all applicable Town records, GIS data, and a complete electronic version of the Town Assessor’s database.
- Assistance with logistics and scheduling of community meetings.

3 – Comprehensive Plan Content

The planning process will be structured to produce a Comprehensive Plan that responds to the State of Maine requirements for this document. The general proposed contents include:

- Introduction/Why Plan?
- York Today
- Regional Picture
- What we Heard
- Vision
- Topic Areas with State goal, analyses, conditions and trends, policies, strategies, for each (note that this information may be organized and presented in a different way than listed here to accomplish client goal of a user-friendly and concise document):
 - Historic and Archaeological Resources
 - Water Resources
 - Natural Resources
 - Agricultural and Forest Resources

- Marine Resources
- Population and Demographics
- Economy
- Housing
- Recreation
- Transportation
- Public Facilities and Services
- Fiscal Capacity and Capital Investment Plan
- Existing Land Use
- Climate Change Adaptation and Vulnerability
- Sustainability
- Implementation Plan including suggested priorities, roles, funding sources
- Appendices with all relevant data and background information

Specific information on key sections of the Plan, organized by topic area, is shown below:

- Land Use and Zoning

A fresh look at land use and zoning should be in the context of Town goals for economic development, housing, and other elements. Our land use and zoning assessment will involve documenting and verifying existing conditions using Town-provided GIS data and zoning regulations. We will use this assessment and field work to identify potential residential, commercial, and light industrial/tech growth areas and work closely with the client to create a build out analysis showing potential growth for the next 10 -15 years. Recommendations will be made to align zoning with goals and priorities in these areas as well as throughout all districts of the town including the villages and historic areas.

- Transportation and Congestion Management Including Multi-Modal Opportunities

For transportation, our team will identify and assess the existing circulation system for all modes by reviewing existing reports and data for an efficient use of resources. We will identify transportation goals and objectives, focusing on congestion management and multi-modal opportunities, working with the Town to develop recommendations to support an interconnected transportation network. We will review the goals and objectives of the existing updated Comprehensive Master Plan and the Bicycle and Pedestrian Master Plan, and update them to align with multimodal transportation objectives that meet goals identified in recent planning reports, as well as the overall goals of the Master Plan. While we understand key goals are congestion management and multi-modal opportunities, we will address implementation of Complete Streets strategies (and assessment of how historic districts may limit possibilities), expansion of the sidewalk network, and expanding walking and biking networks via on-road facilities and off-road shared use paths to improve overall town connectivity and access to open space and recreation, exploring opportunities for shared-mobility services for the aging population, and exploring strategies to dilute visitor crowds and manage tourists to ease village traffic congestion during peak months. We will speak with representatives from local transportation advocacy groups to understand unique issues and opportunities in York as they relate to the types of transportation needed for different populations.

- Economic Development Focusing on Business Development and Revitalization of Villages

The economic development strategy will be formulated in three steps that will result in a data-driven action plan informed by local knowledge and community priorities.

Phase 1: Review of existing local regional plans and current economic development activities in conjunction with stakeholder interviews will be used to identify key York assets and opportunities and clarify economic development goals and priorities. We will focus on the villages, and we may also surface other opportunities and areas of focus for the economic development element. This phase includes three focus groups – one for each of the villages we are focusing on regarding revitalization efforts.

Phase 2: This phase will analyze existing conditions and economic and market trends for York's villages and other commercial areas and will identify regional growth sectors to target for future commercial and possible light industrial development along with competitive strengths and weaknesses to address in the plan. It will include an analysis of regional employment and business trends for York County and the Portland-South Portland MSA to help identify opportunities to diversify and strengthen York's economic base and the town's role and economic assets within the regional economy. For the village revitalization strategies, the results of the economic analysis will be integrated with the results of other parts of the planning analysis to create a comprehensive strategy that combines economic development interventions with placemaking, housing, and transportation actions and leverages the town's cultural and historic assets.

Phase 3: This third phase will develop a detailed action and implementation plan with the specific policies, projects and activities to advance economic development, townwide and for village revitalization strategies. The implementation plan will address the role of different economic development stakeholders, including the town, the York Chamber of Commerce and business community and Southern Maine Economic Development District. It will also incorporate opportunities for York to leverage state and regional tools and resources for implementation.

- Housing: Affordable and Workforce Housing

The housing component of the plan will follow an intense background research process that relies on a wide variety of sources (including early meetings, interviews, local and regional planning materials, census data, market data resources, survey data when available, etc.). Data will be assimilated into a user-friendly narrative with graphic representations of the existing housing dynamic with projections of future housing issues. There are three components to our proposed housing work for the comprehensive master Plan:

Housing Needs Assessment:

We will complete a Housing Needs Assessment for the Town of York as part of the data-gathering phase of the project. This report will outline existing demographic data on a state, national, and Town level based on U.S. Census data, Town sources, and MaineHousing databases. It will outline the state of the existing housing stock in York with respect to building type, condition, location, and adaptability. Finally, comparing current trends and existing stock, it will identify potential future shortcomings in housing needs and supply to address in the Comprehensive Plan.

Report on Emerging Best Practices for Housing:

We will provide a complete document outlining practices that are being utilized by communities in Maine, New England, and nationally and include research on their effectiveness. This report will summarize research completed by national thinktanks such as the Lincoln Institute for Land Policy, as well as state and local data from the Southern Maine Planning & Development Commission, MaineHousing, and other research efforts. Practices that work well in similar communities will be highlighted.

Housing Section of the Comprehensive Plan:

The Housing section (or comparable) of the York Comprehensive Plan will offer a cross-disciplinary sensibility to a town housing strategy that combines the needs identified throughout the plan, as well as best practices, along with public and Town input. This section will provide goals for the life of the plan as well as aspirational goals, and a set of recommended actions to address the needs outlined for the Town's current and future residents.

- Cultural, Historic & Archaeological Resources

York's long history and the existence of historic buildings and districts, as well as the Town's dependence on the visitor economy, make an assessment of cultural and historic assets and resources essential to the potential support of other goals. Our work will identify and incorporate ways to use cultural and historic resources to support village revitalization strategies and contribute to York's tourism and visitor economy, such as expanding the off-peak visitor activity. We are also interested in exploring the potential to address transportation and congestion challenges by exploring connectivity between sites, identifying possible new "cultural and historic trails" and extending the shoulder season for tourism, among other things.

Cultural and historic resources will be documented by looking at existing conditions materials from the Town, including historic and cultural inventories, photographs, and historic asset GIS maps, and by using focus groups and interactions with key stakeholders to fill in missing information regarding key assets. A plan for preserving and enhancing these resources builds from the direct needs of these elements and also from other elements of the plan.

- Natural, Water, Agricultural and Forest Resources and Recreation

The team will use recent planning and studies, including the Cape Neddick River Watershed Plan and other relevant studies, as a framework for natural resource protection goals and recommendations in the master plan. Climate change adaptation strategies are closely linked to this work as we explore ways that the natural environment and living ecosystems can mitigate catastrophic weather events and even provide enhanced recreation areas.

- Climate Change Adaptation and Vulnerability and Sustainability

The new State of Maine requirements for resiliency planning in comprehensive master plans are general in nature. We propose adding a climate resiliency chapter in the Comprehensive Plan. This chapter would focus on climate change issues that are of a concern in York (e.g., local flooding, storm events and storm surge, etc.) and will draw from the Climate Action Plan which will be

completed prior to the completion of the Comprehensive Plan. We propose using the following outline to summarize the separate CAP findings:

- Climate Change Threats
- Vulnerabilities (at risk populations, social issues, land use and buildings, environmental resources)
- Adaptation Strategies (stormwater, green infrastructure, development standards, heat mitigation, transportation, energy, wastewater, water, vegetation management)

We propose to weave sustainability goals and filters throughout the entire plan and planning work. The team sees this element of the master plan as a kind of filter that informs the decisions, goals, and recommendations of the rest of the plan. We usually provide a plan checklist that can be used by our clients as they move to implementation to ensure that actions and priorities are in line with and serve overall sustainability and quality-of-life goals.

- Public Facilities and Services

An assessment of infrastructure is essential to effectively address climate change, vulnerability, sustainability, natural resource protection, and village revitalization. Many communities attempting to address these issues find stressed and outmoded infrastructure at the core of their impending needs. Facilities will be aligned with other elements of the plan based on goals and priorities and recommendations made to ensure that buildings and infrastructure keep pace with and serve the needs of the town. Our team will inventory existing facilities by examining information provided by the Town and by looking at population projections as well as Town assessments of existing facilities and projections for school enrollment.

4 - Scope of Services and Project Approach

The proposed Scope of Work and Project Approach are described in the project phases detailed below. Phases are not meant to represent an exact linear progression through the project but will overlap and be iterative as necessary.

Phase 1A: Project Start-up/Research and Review of Existing Conditions

Meet with Town Steering Committee, set working protocols and schedule, and identify data sources and methods.

Overall Approach to Existing Conditions Inventory and Analysis

Our team will use existing local and regional plans and current studies, as well as additional information as described in the RFP and as identified by CivicMoxie and the client in order to understand baseline current conditions and trends according to the State requirements for Comprehensive Plans. This information will be supplemented with field work, outreach, and further research.

1. Meet with client/team kickoff meeting + site visit (including tour with client, windshield survey and physical characteristics mapping).

2. Review existing Comprehensive Plan and all other relevant studies and plans at the town, regional, state level. Summarize relevancy for Comprehensive Plan.
3. Summarize all data and information provided by the Town in a graphic and accessible format, including preparing GIS base maps and other baseline graphics and data. Document baseline current conditions and trends according to the State requirements for Comprehensive Plans.
 - a. Historic and Archaeological Resources
 - b. Water Resources
 - c. Natural Resources
 - d. Agricultural and Forest Resources
 - e. Marine Resources
 - f. Population and Demographics; describe residential, commercial, industrial conditions and trends to 2040
 - g. Economy: local and regional economic analysis, including general business conditions and business development and commercial areas of villages
 - h. Housing: housing needs assessment - from demographics, state of existing housing stock, national, state, local trends, analysis of stock and need, with emphasis on affordable and workforce housing
 - i. Recreation
 - j. Transportation (including Transportation Congestion Management and multi-modal): Assess and map current and proposed infrastructure: circulation, transit, bike, ped, including traffic congestion information
 - k. Public Facilities and Services
 - l. Fiscal Capacity and Capital Investment Plan
 - m. Existing Land Use: including research regarding existing permitting/approvals processes
 - n. Climate Change Adaptation and Vulnerability and Sustainability: The Climate Action Plan will inform this topic.
4. Research best practices that work well in similar areas will be explored and referenced in the plan according to topic area.
5. Prepare Existing Conditions summary.

Phase 1A Products:

- Easy-to-understand and graphic summaries of all documentation and existing conditions and trends in charts, drawings, and text - document to be submitted in Word with information used for initial public meetings.
- Analysis summaries with graphics, info-graphics, charts, text, maps, photos, etc. in Word format.
- Best Practice information (and in Phase 2 as we identify recommendations and issues).

Phase 2A: Exploring Goals, Topics, Policies, and Actions

Develop draft goals based on information provided in Phase 1 existing condition work as well as feedback received from the client and from stakeholder outreach as described in the next phases below. Exploration of goals, and recommended strategies will be iterative and will evolve over the course of the project.

1. Building from existing conditions and trends analysis outreach in other phases, work with the client to create draft information for each topic area below with the following: State goal, analysis, Town goals/vision, policies, and strategies:
 - a. Historic and Archaeological Resources
 - b. Water Resources
 - c. Natural Resources
 - d. Agricultural and Forest Resources
 - e. Marine Resources
 - f. Economy
 - g. Housing
 - h. Recreation
 - i. Transportation
 - j. Public Facilities and Services
 - k. Fiscal Capacity and Capital Investment Plan
 - l. Future Land Use: including research regarding existing permitting/approvals processes
 - m. Climate Change Adaptation and Vulnerability and Sustainability: The Climate Action Plan will inform this topic.
2. Use the Climate Action Plan as well as sustainability principles to inform recommendations in the plan topic areas.
3. Create a draft Fiscal Capacity and Capital Investment Plan that considers all of the goals, polices and strategies for the topic areas of the Plan.
4. Use outcomes of public process and data analysis to identify barriers, and to select preferred alternatives and draft policies and actions and implementation recommendations.
5. Create a preliminary implementation strategy by identifying potential implementation partners and funding to guide next phase decision making.

Phase 2A Products:

- Draft vision statement and goals with recommendations
- Draft goals and recommendations for plan

Phase 3B: The Plan - Preparing the Draft and Final Comprehensive Plan, including implementation

Create a user-friendly, graphic, and concise (under 100 pages) Plan that is a compelling presentation of a vision and clear roadmap forward for the Town for the coming years. Provide clear metrics to measure progress in implementing plan and ensure there is widespread "ownership" and excitement about the Plan in the community.

1. Use public workshop and focus group outcomes to prepare Comprehensive Plan that includes all of the State requirements for Comprehensive Plan certification including:
 - a. Design of document, introduction, overview, community participation process
 - b. York today in words, maps, numbers, and regional context
 - c. Vision statement
 - d. Topic Areas: State Goal, Analysis, Town goals, policies, strategies

- e. Five-year priorities, implementation strategies for full plan, and fiscal capacity and capital investment plan
 - f. Appendices
2. Submit draft plan to client for review, revise as necessary based on client and public feedback
 3. Revise based on Planning Board meetings and Board of Selectmen hearings and submit final plan for referendum.

Phase 3B Products:

- Draft Comprehensive Plan in MS Word, Final Comprehensive Plan in MS Word and InDesign, with Executive Summary and Implementation Plan with responsible parties/partners, potential funding sources, prioritized action items, and timeframe.

Phase 4: Communications and Outreach

Work with the client to ensure all members of the community have an opportunity to engage with the planning process, particularly those not typically included such as young people, immigrants, seniors, and low-income families. Assist with specific outreach efforts and meetings with specific constituencies as necessary to ensure equitable overall participation.

Goals for this effort include:

- Educate stakeholders about the Comprehensive Plan.
 - Maximize community input and inclusive participation.
 - Develop broad “ownership of the plan” to ensure community support and future implementation.
1. In collaboration with client, develop a public communication + engagement plan including detailed schedule, roles, social media strategy, mtg/outreach calendar, etc.
 2. Assist client in forming the Steering Committee (SC), and sub-working committees, develop roles and regular meeting schedule and format, and assist in planning for, and facilitating a kick-off meeting for the Committee.
 3. Attend Steering Committee meetings (including preparation, client to prepare mtg notes/summaries) – 12.
 4. Conduct key stakeholder interviews and summarize all - up to 30 during Phase 1 and 2 - including Town and State officials and board members.
 5. Conduct Focus Groups (up to 8) to discuss challenges, assets, goals, including one in each of 3 villages (including summaries of all).
 6. Facilitate Department Head/Town Leadership meetings (2) to get preliminary input on plan goals and existing conditions and then to solicit feedback and implementation information on draft recommendations.
 7. Create and administer survey(s) for survey monkey to gather preliminary information on best outreach, expectations, concerns during Phase 1 and possibly Phase 2 for input on key issues or recommendations (this would be a paper survey to get statistically significant responses as the goal later in the project to get feedback from residents).
 8. Set-up and manage Social Pinpoint online engagement platform.

9. Prepare materials to support civic conversations/civic socials initiative, create summaries of feedback.
10. Prepare for and attend:
 - a. Planning Board Meetings
 - b. Board of Selectmen Meetings
11. Prepare for and conduct public mtgs/workshops or equivalent open houses or other outreach (including preparation, graphics, all materials, and summaries of outcomes), 3 -4 total:
 - a. Public Mtg #1: introduce goals of Comprehensive Plan and discuss the process and solicit feedback on how stakeholders wish to be involved and key issues/interests.
 - b. Public Mtg #2: workshop with overall presentation of inventory and analysis of plan elements for Comprehensive Plan with breakout groups. Participants will have the ability to switch to new breaking groups during the forum. Breakouts will solicit suggestions for strategies as well as perceived barriers to change and potential solutions to same.
 - c. Public Meeting #3: Present draft plan goals and recommendations and solicit feedback on same as well as implementation strategies, partners, and funding possibilities.
 - d. Public Meeting #4: Present the draft Comprehensive Plan to the public.

Phase 4 Products:

- Communication and outreach plan, outlining strategies, measures for evaluating success in engagement, and social media guidelines
- All PowerPoints, meeting flyers, maps, workshop and breakout materials, and other information as determined are necessary for public process.

Phase 5: Project Management

1. Bi-weekly client project coordination calls.
2. Monthly project management tasks.
3. Team milestone ideas meetings/brainstorming, including client (2).