

Exhibit A: Scope of Work

Planning & Engagement Consulting Services, Comprehensive Plan
City of Durham, North Carolina

General

1. City-County Staff (hereafter referred to as “Staff”) will work closely with the Planning Next Team (hereafter referred to as “Team”) to assist with the various community engagement efforts, but the Team will take the lead.
2. In addition to this scope of work focused on managing the engagement effort an allotment of hours/fee is earmarked for as-needed planning expertise throughout the comprehensive planning process.
3. The planning process is expected to be completed in three years through six phases:
 - Phase 0: Preparation
 - Phase 1: Big Questions and Project Launch
 - Phase 2: Big Ideas and Vision
 - Phase 3: Policy Framework
 - Phase 4: Actions, Strategies, Implementation
 - Phase 5: Review and Adoption

Scope of Work

Phase 0: Preparation

The Team places great emphasis on the preparation phase to create a strong foundation for the complex planning process. During this phase, the Team will work with Staff to collaboratively design the engagement process.

0.1 Conduct Orientation Workshop. The Team and Staff will conduct an orientation workshop. Staff will share contextual and background information that is important to the Team’s work, and the Team will discuss how they anticipate approaching the work. The meeting will produce a refined approach to the engagement of the community.

0.2 Assist Formation of Outreach and Communications Committees. The Team will assist in formation of an Outreach Committee and Communications Committee. Both of these committees will be made up of volunteer citizens. Outreach members will focus on a word-of-mouth approach to attracting participants to the process. Communications members will focus on creating general awareness of opportunities to participate. The Team is prepared to advise Staff on the formation of the committees. These groups should be representative of the broader community and include individuals that are diverse demographically, geographically and civically. The Team will prepare materials to assist Staff with committee selection (including job descriptions, application forms and a diversity matrix). Staff will use materials to recruit committees.

0.3 Develop and Manage a Neighborhood Ambassador Program. Working with Staff, the Team will create a group of up to 30 “neighborhood ambassadors” from typically underrepresented communities. Neighborhood ambassadors will be paid support for the outreach strategy. They will be recruited, recruit, hired and trained to engage the communities they represent on land use concepts, issues education, and input on the Comprehensive Plan vision, content and policies. This group will be responsible for energizing their networks and delivering participants to the Comprehensive Plan process.

0.4 Convene Outreach and Communications Committee Meetings. The Team will conduct seven meetings with both the Outreach Committee and Communications Committee throughout the process. The first meeting will

be an orientation meeting for the committees. The primary focus of the first meeting will be to set expectations and goals for outreach and communications throughout the planning process. The committees will have direct involvement in developing outreach methods and communication strategies to be used in the Outreach and Communications Plans (Tasks 0.5 and 0.6).

0.5 Develop an Outreach Plan. Working closely with the Outreach Committee and Staff, the Team will develop an Outreach Plan that clearly defines comprehensive strategies to personally invite diverse participants to engagement opportunities. The Outreach Plan will be supplemented by an Outreach Toolkit to be utilized by Ambassadors or volunteers. The Outreach Toolkit will include scripts for phone, email and social media posts; letter to the editor templates and instructions; flyers; and community meeting invitations to be used by the committees when getting the word out about the process.

0.6 Develop a Communications Plan. Working closely with the Communications Committee and Staff, the Team will develop a Communications Plan. It is the Team's recommendation that the plan be developed concurrently with the Outreach Plan (Task 0.5) and closely coordinated. Specifically, the communications effort will include both general awareness-raising as well as specific promotional activities associated with all rounds of community engagement. Prior to all community engagement meetings, the publicity and outreach channels will be activated with messages relevant to the upcoming events.

0.7 Create Project Branding. The Team will work with Staff to develop a project name, logo, color scheme, and tagline for the effort that will help to interest the public, as well as key messages that will consistently brand the planning work. The Team will also develop a campaign for communications that capitalizes on existing outlets for sharing information and builds upon the use of these outlets with a suite of branded collateral (posters, postcards, flyers, worksheets), press releases and other tools for getting the word out. All collateral will be delivered in both English and Spanish languages.

0.8 Create a Project Website and Social Media Presence. The Team will design an interactive project website that will be user-friendly and engaging to become the heart of plan's communications. The site will present materials from stakeholder and community engagement, interim information and drafts of planning documents. It will include project background, resources, news and information about how to get involved. The website will have a Spanish page option with all necessary information about the process. The website will also have the capability for interactive tools for engagement. Online activities will take place throughout plan development and in coordination with all rounds of community engagement. Partnering with Staff and the County's communications offices the Team will either develop new, project-branded social media accounts or utilize existing accounts for promotion and engagement. The website will be synchronized with social media.

0.9 Meet with Joint City-County Planning Committee (1). Throughout the process, the Team will meet with the JCCPC to keep them actively involved and informed. During this phase it is anticipated that the Team will convene an orientation work session with the committee to review overall scope and their specific role as share and gather feedback on approach to engagement.

Phase 0: Deliverables

- Meeting agendas, handouts and presentations
- Outreach and Communications Committees formation materials
- Outreach and Communications Plans
- Project identity (logo, tag line, key messages)
- Project website and social media accounts

Phase 1: Big Questions & Project Launch

This phase will include educating the community on planning, creating awareness of the Comprehensive Plan effort, and conducting community listening sessions as well as public input data analysis that can culminate in a list of key community concerns, issues and opportunities.

1.1 Meet with Joint City-County Planning Commission (2). Throughout the process, the Team will meet with the JCCPC to keep them actively involved and informed. During this phase it is anticipated that the Team will meet with the committee one time at a critical pre and post milestone to share progress and gather input.

1.2 Create an Educational Program and Materials. The Team will work with Staff and community contacts to develop an accessible educational program and materials. These may be used by the City-County and neighborhood ambassadors to educate the general public on historical land use decisions in the community and the current process and framework for land use decisions.

1.3 Conduct Listening and Learning Sessions. A series of up to four workshops, branded as “Listening and Learning Sessions,” will take place in several locations throughout the City-County and provide an overall orientation for the public to the planning process. The goals of the Listening and Learning sessions are to lay the foundation for the process—to start the conversation and to inspire the community to think big about what they want. The workshops will be broadly promoted in accordance with the Outreach and Communications Plans (Tasks 0.5 and 0.6). The events may include a brief assembly period during which there would be an overview of the process and schedule, followed by small group activities designed to be interactive, inspiring and fun. Online engagement activities mimicking those in the Listening and Learning sessions will also be deployed. The Neighborhood Ambassadors will support the Listening and Learning sessions by conducting targeted outreach and could serve as table facilitators during the workshop.

Following every public workshop throughout the process, participants will be asked to complete an exit questionnaire related to demographics. Using this data and analytics and the observed experiences of community members, the Team will reassess the structure of future outreach and community engagement to be responsive to the documented behavioral preferences of community groups involved and make any necessary changes to the Outreach and Communications Plans and upcoming event formats. The Neighborhood Ambassadors will be utilized to help fill in gaps in participation based upon the exit questionnaire data in the form of meeting-in-a-box or other follow-up activities.

1.4 Prepare a Community Concerns, Issues and Opportunities Summary. Using the input provided from the Listening and Learning Sessions, a summary will be prepared that synthesizes this input and highlights community concerns, issues and opportunities.

Phase 1: Deliverables

- Meeting agendas, handouts and presentations
- Community Concerns, Issues and Opportunities Summary

Phase 2: Big Ideas & Vision

Phase 2 will focus on educating the community about current conditions, future trends and forces that will affect the community, and generating a discussion about their ideas for the future of the City-County. It will create community-wide interest for the planning process through a high-profile event and follow-up activities. Ideas shared during this phase will result in the generation of a clear and actionable vision statement and set of values/guiding principles that can guide policy development.

2.1 Facilitate Focus Group Meetings. The Team will coordinate with Staff to conduct a series of up to eight stakeholder meetings to identify key topic areas for discussion at the upcoming community-wide event, the “Vision Summit”. The list of stakeholders will be developed by Staff and the Team. Focus group meetings will include interviews and small roundtable discussions.

2.2 Host the Vision Summit. This community-wide workshop, branded the “Vision Summit,” will build on the Listening and Learning Sessions. (NOTE: To gain greater interest and an exciting first impression, a relevant, notable speaker could be included in the program.) The workshop will be broadly promoted and scheduled on one evening in one location. The Vision Summit will center on activities that will focus on how the City-County should plan for its future. The conversation will focus on affirming a vision statement and set of values/guiding principles based on what was heard in the Listening and Learning Sessions (Task 1.3). Online engagement activities will also be deployed that mimic the Vision Summit activities.

2.3 Conduct “Pop up” Workshops. The strategy for the “pop up” workshops is to take messages and information directly to people throughout the City-County—especially the hard-to-reach members of the community and traditionally under-served audiences. After reviewing the exit questionnaires from the Vision Summit (Task 2.2), the Team will lead and host “pop-up” workshops throughout the community to reach those who were not well represented at the Summit, such as at a bus station, grocery store, city/county parks, senior center, homeless shelter, etc. Activities will be conducted in places and at events where people are already planning to be to maximize interest and participation rates. It is anticipated that up to four “pop up” workshops will be planned in association with the Vision Summit. The activities will be designed by the Team, and staffed by the Neighborhood Ambassadors and or Outreach Committee to help execute them.

2.4 Deploy Web-based Engagement Tools. While face-to-face communication will be the heart of the engagement process, web-based tools will be used to broaden our reach and to inspire creative thinking about topics that emerge as important to the public. In association with all rounds of community engagement, web-based tools will be integrated into the project website. Web-based engagement will overlap and correspond with activities at the in-person meetings.

2.5 Create a Community Values and Vision Report. Using the input provided from the community engagement activities above, a report will be prepared that synthesizes this input and highlights key trends and observations. This report will be a cumulative outreach summary and include the results of both Phase 1 and Phase 2 of the engagement process. The report will be reviewed and commented on by Staff.

2.6 Meet with Joint City-County Planning Committee (3). Following Staff review, the Team will meet with JCCPC to present the Community Values and Vision Report.

Phase 2: Deliverables

- Meeting agendas, materials, handouts and presentations
- Community Values and Vision Report

Phase 3: Policy Framework

Phase 3 will include working with the community to translate their big ideas and vision into a broad set of policy priorities and goals, likely related to land use, housing, infrastructure, economic development, and more.

3.1 Prepare for Community Choices Meetings. The Team, in collaboration with Staff, will use public feedback provided in the Community Values and Vision Report (Task 2.5) to develop a broad set of policy priorities and goals. These priorities and goals will be used to develop the formal strategy for the Community Choices Meetings—four community meetings that frame choices on “where” and “how” the City-County should grow.

3.2 Facilitate Community Choices Meetings. During these face-to-face workshops (up to four) participants will be invited to interact with what was learned through previous rounds of engagement and to prioritize and comment on preliminary goals and policy priorities of the plan. The format will be determined in discussion with Staff but may involve a brief assembly period and presentation followed by draft recommendations on display boards (replicated as hand-outs). Participants would be provided with worksheets for rating and commenting. Online engagement activities will also be deployed that mimic the Community Choices activities. The Neighborhood Ambassadors will support the Community Choices Meetings by conducting targeted outreach and provide general support during the workshops. The Neighborhood Ambassadors will also be utilized to help fill in gaps in participation based upon the exit questionnaire data in the form of meeting-in-a-box or other follow-up activities.

3.3 Create Community Directions Recommendations. Following the above community engagements, recommendations will be prepared based on the feedback provided. The recommendations will be for short-term policy alternatives and scenarios developed in collaboration with Staff. Staff will review and comment on the report.

3.4 Meet with Joint City-County Planning Committee (4). Following Staff review, the Team will meet with the JCCPC to present the Community Directions Recommendations.

Phase 3: Deliverables

- Meeting agendas, materials, handouts and presentations
- Community Directions Recommendations

Phase 4: Actions, Strategies, Implementation

Phase 4 will be used to reignite enthusiasm for the Comprehensive Plan process after the draft plan has been created. The Team will work with the community to develop and review specific policies and actions intended to implement the vision and policy framework, weigh various pro's and con's, evaluate trade-offs, and more.

4.1 Conduct the Open House(s). A final Open House will be held once the draft Comprehensive Plan has been prepared, but before it has been finalized. It will begin with an evening event at a single location but be designed so that it can also be used as a traveling exhibit (road show). A presentation by the Team will summarize the Comprehensive Plan, but most of the time will be reserved to allow the public to view and comment on a series of displays summarizing the plan. The Team and Staff will be present to answer questions on a one-on-one basis. If appropriate, a questionnaire can be distributed to participants asking key questions about the draft plan as well as implementation measures.

The Open House displays will then travel to different locations in the City-County for two to three weeks. (The Neighborhood Ambassadors could assist with this task.) In addition, they will be posted online. In both cases, preferences for recommendations and comments can be provided. The project displays will be designed to be mobile device friendly, so they can easily be viewed on smartphones and tablets.

4.2 Host Community Group Presentations. The Team and Staff will present the draft Comprehensive Plan to targeted groups, such as neighborhood groups, private sector groups, development community, etc. Up to four presentations will be given throughout the City-County, and invited groups will be determined in collaboration with Staff. These presentations will provide an opportunity for targeted groups to share input directly with the Team and ask questions. Neighborhood ambassadors may be reconvened to assist with these presentations.

4.3 Prepare a Plan Feedback Report. A report will be prepared that summarizes the public direction provided during the Open House and Community Group Presentations. Staff will review and comment on the report.

Phase 4: Deliverables

- Meeting agendas, materials and handouts
- Plan Feedback Report

Phase 5: Review & Adoption

Phase 5 will include additional community engagement, education, and review of the document, comment, edits and finalization of the draft for recommendation by the Planning Commission, and action by both the City Council and the Board of County Commissioners.

5.1 Publicize the Public Review Draft. The Team will publicize the draft Comprehensive Plan and solicit public comments for 30 days prior to the presentation given to elected and appointed boards and commissions for final approval.

5.2 Create a Summary Report of Draft Plan Comments. Following the public review period, the Team will prepare a summary report of the public review draft comments.

5.3 Present to Joint City-County Planning Committee (5). The Team and Staff will present the plan's draft recommendations to the JCCPC for review and final approval.

5.4 Adoption Hearings. The Team will be available to attend public hearings in support of adoption of the Comprehensive Plan.

Phase 5: Deliverables

- Meeting agendas, materials, handouts and presentations
- Summary Report of Draft Plan Comments