

City of Lake Forest Park Visioning and Comprehensive Plan Update Scope of Services (04/15/14)

Introduction

The City of Lake Forest Park (City) is undertaking a rewrite of the City's Comprehensive Plan. Major project goals include the following:

1. Meaningful public outreach and visioning to support the Comprehensive Plan update
2. Incorporation of fiscal and public finance issues in the visioning and outreach process
3. Identification of innovative and workable approaches to long-term revenue generation and service delivery
4. Development of a long-term financial strategy for a financially sustainable approach to municipal services for the City
5. Fiscal review of potential land use scenarios for the Comprehensive Plan update
6. Integration of regional transportation improvements with local transportation systems and land use patterns
7. Meeting all requirements for the 2015 update established by the GMA
8. Reflecting issues identified through staff, City Council and Planning Commission interviews.
9. Effective communication between the City project manager and team and the Consultant.

It is recognized that some of the project goals may be achieved through a future phase of project work. Tasks completed in this Scope of Services will help to identify and clarify the essential next steps in order to achieve the City's major project goals.

The City has selected the Studio 3MW team (Consultant) to lead the visioning and Comprehensive Plan update. The Scope of Services described below includes tasks to conduct visioning, incorporate fiscal analysis into the visioning and planning process and complete planning tasks for the 2015 Comprehensive Plan update.

Project Tasks

1. Project Initiation

Consultant will undertake the following project initiation tasks:

- a) Conduct research to identify community organizations, potential venues for visioning, and to assess interest and capacity for volunteer mobilization.
- b) Facilitate a meeting with the Mayor and City Council and other commission to review our visioning approach, key messages and desired outcomes. We will lead a brainstorming session to

identify additional activities, contacts, venues and key questions to be incorporated into the process.

- c) Create a database of community contacts that can be used for outreach purposes as well as managing the needs of various organizations for implementing visioning activities.

WORK PRODUCTS

- Community outreach database
- Memorandum confirming approach, key messages and outcomes

2. Vision Strategy and Outreach Plan

Based on Task 1, Consultant will document the final strategy, including the selected activities, techniques, methods and process for developing the final vision statement. The strategy will ensure effective integration with the economic assessment and comprehensive plan processes. The strategy will describe specific vision activities including the organizations, facilities and events that will be used for the small scale activities, and the plans for the large community workshops. It will include the volunteer recruitment effort and document key objectives, outreach activities, and a detailed timeline for public involvement activities.

WORK PRODUCT

- Visioning plan/roadmap that includes selected activities, techniques, methods and process for gathering input

3. Project Identity

Consultant will develop a project identity for project communication materials and will include a consistent layout specifying fonts, colors, graphical elements, targeted headlines and integration of appropriate logos from the city and other partners. The project identity developed in this task will serve as a template for the Comprehensive Plan update.

WORK PRODUCTS

- Project logo
- Style guide and templates for communication materials

4. Project Communication Materials

Consultant will develop project communication materials including project flyers, posters, electronic content and other collateral to promote the project and visioning events. Materials will be appropriate for a variety of audiences, settings and purposes.

WORK PRODUCTS

- Consistently designed and messaged project materials
- Support materials for informal outreach and public workshop

5. Community Outreach and Visioning

Consultant will develop news releases and conduct media relations, distribute visioning information in the newsletters of community organizations, schools and the City, and via utility bills, listserves, and social media connections.

Consultant will coordinate and train volunteers to participate and support multiple visioning outreach activities. Consultant will coordinate the specific visioning activities at each of these venues, and using an excel spreadsheet, create a detailed schedule of locations, dates, organizations and audiences. Working with members of the community, Consultant will plan, coordinate and facilitate up to these activities. Consultant will lead up to ten activities.

Consultant will plan, coordinate and facilitate a community workshop to synthesize, prioritize and solidify a common city vision. Consultant will work with the City to plan the workshop, manage logistics, attend and facilitate the event, and prepare a workshop summary.

WORK PRODUCTS

- Volunteer registry
- Training and coordination
- Planning, facilitation and coordination of all visioning venues
- Community workshop planning and facilitation

6. Statistically Valid Survey

The survey will consist of a 15-minute telephone survey with a representative sample of 150 residents. This approach will allow topics such as citizens' perceptions of the community, city performance, potential revenue sources, and planning priorities to be addressed. The sample size is sufficient to represent the opinions of the community broadly and to look at broad demographic group differences, such as age and gender.

Research design for the survey includes the following assumptions:

- Scientific and random survey of 150 residents age 18 and older
- 15-minute survey instrument with up to three open-ended questions (45 total)
- A mixed-sample methodology, including Random Digit Dialing (RDD) and cell phone sample. In accordance with federal guidelines, all cell phone numbers will be hand dialed and respondents screened to ensure they live within the city limits.
- Quotas for age, gender, and area of city will be set to reflect the actual population of the City, based on recent census demographics, to ensure a representative sample.
- The survey size will provide a 95% confidence level with a margin of error between ± 4.8 and $\pm 8.0\%$.

WORK PRODUCT

- Statistically valid survey
- Summary and analysis of survey results

7. Draft and Final Vision Report

Based on the information gathered in the prior tasks, Consultant will work with the City to craft a vision statement to guide comprehensive plan development and eventual implementation. Based on comments and direction, Consultant will revise and finalize the vision statement and prepare a final work product that includes a summary of the vision process, compiled data from vision activities and the final vision statement.

WORK PRODUCT

- Draft and final visioning report

8. Fiscal Analysis: Levels of Service

Consultant will interview department heads to identify their expectations about the level of service and to identify metrics (i.e., performance measures) to evaluate and benchmark level of service and financial alternatives. The following are examples of metrics that may be considered:

- demand measures (externalities)
- output measures (services produced)
- staffing ratios (staff per capita)
- unit costs (efficiency or productivity)
- outcome measures (results)
- economic variables (influencers of cost and tax base)
- growth measures (new development, annexation, etc.)
- prioritization (core/secondary/value added or other method)

City staff will provide the level of service information that will be used to inform the visioning process, the Comprehensive Plan update and, as part of Phase 2, the Lake Forest Park Finance Academy.

WORK PRODUCT

- Updated Level of service metrics for Lake Forest Park services

9. Fiscal Analysis: Service Delivery Alternatives

Consultant will identify alternative ways for the City to deliver services to its residents, including joint service agreements with neighboring jurisdictions, regional service delivery agencies, public/private partnerships, and contracts with private sector providers. The service delivery alternatives will inform the visioning process, the Comprehensive Plan update and, during Phase 2, the Lake Forest Park Finance Academy.

WORK PRODUCT

- Memo of service delivery alternatives

10. Fiscal Analysis: Land Use Assessment

Consultant will assess current and potential future land use scenarios and their relationship with fiscal impacts and policy. This will include both a quantitative and qualitative assessment of land use patterns and the fiscal impact they have on the City. The analysis will be informed by real market data and trends.

Consultant will review City revenues by revenue source and land use by parcel and subarea within Lake Forest Park. Analysis will examine the relationship between land utilization by land use type with revenues achieved by the City.

Consultant will compile and analyze growth forecasts for the City and surrounding area and estimate the city's trade areas and retail trade capture to inform future land use and fiscal revenue scenarios.

Consultant will assemble and analyze real estate market, economic and demographic data for Lake Forest Park to inform analysis of current land use patterns.

Deliverables will include maps, data tables, and matrix display of findings that can help inform land use scenarios in Comprehensive Plan and related decision-making.

WORK PRODUCTS

- Draft and final report

11. Comprehensive Plan Support

Consultant will support City staff in preparation of technical analyses, development of goals and policies, and Planning Commission review of the update to the Comprehensive Plan. Consultant focus will be to ensure consistency with Washington Growth Management Act, Puget Sound Regional Council Vision 2040, and King County Countywide Planning Policies guidance and requirements.

Consultant will focus on preparation of mandatory elements, including Land Use, Housing, Transportation, Capital Facilities and Utilities. City will lead preparation of other elements, including Environmental Quality and Shorelines, Economic Development, Human Services, and Recreation and Open Space, with Consultant support. A description of the approach to each element is described on the following pages.

a) Comprehensive Plan Support: Mandatory Elements

| Plan Element | Approach | Consultant Role | Staff Role |
|-----------------------|--|--|--|
| Introduction | Prepare updated vision statement and other information useful to the reader in understanding how to use the Plan. | Prepare updated vision as described in Tasks 1 through 6. | Lead preparation of draft and revised text |
| Land Use | Update background data, goals and policies based on 2035 growth targets, updated vision and state and regional guidance. | Prepare updated analysis, draft and revised goals and policies | Provide updated background data, review and comment on draft goals and policies |
| Housing | Update background data, goals and policies based on 2035 growth targets, updated vision and state and regional guidance. | Prepare updated analysis, draft and revised goals and policies | Provide updated background data, review and comment on draft goals and policies |
| Transportation | Plan Audit. Review the current Transportation Element and changes needed for GMA and regional plan compliance. | Lead tasks as described under approach. | Participate in meetings, provide review and guidance as described in approach tasks. |
| | Existing and Planned Conditions Refresh. Work from published documents and available data to update the existing and future conditions assessment from the current Comprehensive Plan. This information will be summarized in a memorandum that includes photos of existing conditions and figures that would be developed by Studio 3MW. | | |
| | LOS/Funding Workshop. Facilitate a workshop that with staff from Planning, Public Works, and Finance, and others identified by the City to address transportation system priorities, level of service and GMA requirements and financial issues, | | |
| | Agency Outreach. Meet with up to three stakeholders that are critical to understanding the | | |

| Plan Element | Approach | Consultant Role | Staff Role |
|--------------------|--|--|---|
| | key issues in the Plan. Stakeholders recommended for outreach in this task include WSDOT, King County Metro, and Sound Transit. Update Element. Working heavily from goals and policies developed by the Transportation Commission, update the plan to incorporate the findings of the prior tasks. | | |
| Utilities | Review draft element prepared by others to confirm GMA compliance and internal substantive consistency. | Review draft element | As established in separate agreement for utilities element |
| Capital Facilities | <p>Consultant will lead update based on the following GMA requirements.</p> <ol style="list-style-type: none"> 1. Inventory of existing capital facilities owned by public entities, showing the locations and capacities of the capital facilities. 2. Forecast of the future needs for such capital facilities. 3. Proposed locations and capacities of expanded or new capital facilities. 4. At least a six-year plan that will finance such capital facilities within projected funding capacities and clearly identifies sources of public money for such purposes. 5. Requirement to reassess the land use element if probable funding falls short of meeting existing needs and to ensure that the land use element, capital facilities plan element, and financing plan within the capital facilities plan element are | <p>For the updated inventory, forecast of needs and proposed expanded or new facilities, consultant will evaluate the existing CFP and provide guidance to the City on how to update inventory and need information. Consultant will review and edit the information for inclusion in the CFP.</p> <p>Consultant will evaluate recent and current funding. Consultant will identify other specific potential funding sources that are available to pay for capital improvements. Consultant will prepare estimates of amounts to be available from each funding source. Consultant will review potential funding sources</p> | <p>City will provide updated inventory information, per consultant guidance.</p> <p>City will provide Consultant with the City's recent and current capital improvements funding information.</p> <p>City will prepare update goals and policies, based on input from Consultant.</p> |

| Plan Element | Approach | Consultant Role | Staff Role |
|--------------|-----------------------------|--|------------|
| | coordinated and consistent. | <p>and estimates with the City. Consultant will identify sufficient revenue to fund the projects proposed in the 6-year plan.</p> <p>Consultant will evaluate the goals and policies of the existing CFP and recommend revisions to the City. Consultant will review the updated CFP, and recommend edits to the City.</p> | |

- b) **Comprehensive Plan Support: Optional Elements.** For the optional elements, including the Environmental Quality and Shorelines, Human Services, and Recreation and Open Space, the City will lead preparation of these elements. Consultant will be available for general guidance and advice as needed. For the Economic Development Element, Consultant will provide input on policy development and up to two meetings with the Economic Development Commission.

WORK PRODUCT

- Draft and revised Comprehensive Plan Land Use, Housing, Utilities, Transportation and Capital Facilities Elements

12. Project Briefings

- a) **Visioning Process.** Consultant will work closely with the city's project manager throughout the visioning process and provide briefings to the City Council and Planning Commission at up to three key project milestones.
- b) **Comprehensive Plan Update.** Consultant will be available for up to 10 meetings with the Planning Commission to review Comprehensive Plan data and goals and policies associated with the mandatory elements.

Assumptions

This scope of services and budget is based upon the following assumptions. Additional service requests or alterations beyond those described in the Scope of Services will require supplemental contract modifications or explicit, pre-approved substitutions. Consultant will not perform additional work without written authorization from the City.

1. The scope does not include original data collection except as explicitly described in this scope. Research and data collection will be based on readily available secondary sources of information, including reports, inventories, maps and other similar literature from local government and other sources.
2. Except as specifically noted above, all Consultant deliverables will be limited to electronic file transfers. The City is responsible for document reproduction and distribution of all review and final drafts.
3. The budget presents cost estimates for each task. Time may be transferred from one task to another due to greater or lesser level of effort, provided that each task shall be completed and the total budget shall not be exceeded.
4. The City will post and mail meeting advertisements, arrange meeting rooms for public meetings and support other logistical tasks for public outreach activities.
5. The City will make available to the Consultant all pertinent government documents, studies, GIS data layers and mapping and other technical information pertaining to the project. All documents will be returned to the City as appropriate upon completion of this contract.

6. The Consultant is not responsible for delays in the schedule resulting from delays in the provision of critical information or in decision-making by the City. The Consultant shall notify the City when the Consultant believes that a delay could occur. If a delay has occurred the Consultant shall notify the City in writing.
7. If any additional work is required because of error or omissions by the Consultant, such work will be done without change to the contract price.
8. The City will review and have the opportunity to edit all presentation material in advance of any staff or public meeting.
9. The City will provide updated Growth Targets and Buildable Lands data to the Consultant.

Optional Project Task

Task 10, described above, provides an assessment of future land use scenarios and their relationship with fiscal impacts and policy, including both a quantitative and qualitative assessment of land use patterns and fiscal impacts. This task will support the Comprehensive Plan update process and provide the City with a good basis for information for strategic planning with respect to revenues and services. Conclusions of the analysis will, however, be comparative and qualitative rather than quantitative.

As an alternative to this approach, a more quantitative approach would include the following steps:

Model future land use and development scenarios based on growth forecasts, real estate market trends and prototypical commercial and residential developments to estimate potential revenue scenarios for the City. This approach will include the following.

- Identify land supply constraints within the city and within competitive communities based on a geospatial (GIS) analysis of real estate market trends and values as well as regional forecasts
- Focus on alternative land use scenarios that explore the potential of higher concentrations of commercial development, higher density housing and other revenue generating uses
- To inform development scenarios and forecasts, test development feasibility of prototypical developments suitable for Lake Forest Park utilizing pro forma models
- Using the revenue and services data, estimate fiscal revenues associated with various land use and development absorption scenarios

Similar to the approach described in Task 10, this alternative to Task 10, would support the Comprehensive Plan process and provide the City with data for strategic planning for revenues and services. In contrast to Task 10, conclusions would be quantitative, including estimates of fiscal revenues and costs, rather than qualitative and comparative.

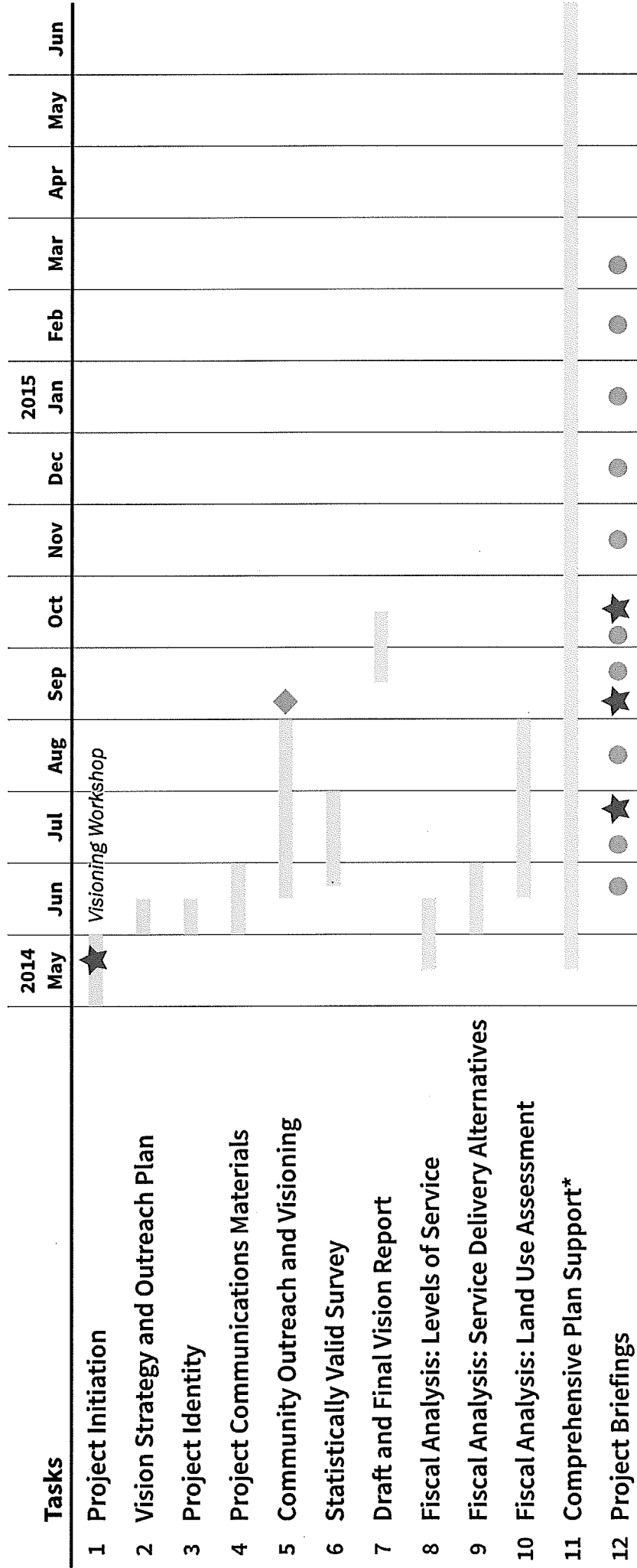
This task would require an additional \$10,000 (approximately 80 hours at \$125/hour) for completion beyond the budget currently shown for Task 10. Alternatively, this task could be completed as part of a future Phase 2 of this project.

City of Lake Forest Park

Visioning and Comprehensive Plan Update

DRAFT Estimate of Hours and Budget (04/13/14)

| | Studio 3MW* | | | | HYCO | | CAI* | | DHM* | | Fehr & Peers* | | TOTALS | |
|--|-------------|-----------|-------|-----------|-------|-------------|-------|-----------|-------|-----------|---------------|-----------|------------|------------------|
| | Hours | \$130 | Hours | \$190 | Hours | \$125 | Hours | \$120 | Hours | \$140 | Hours | Budget | Hours | Budget |
| A COMPREHENSIVE PLAN VISIONING | | | | | | | | | | | | | | |
| 1 Project Initiation | 20 | \$ 2,600 | | | | | | | | | | | 20 | \$ 2,600 |
| 2 Vision Strategy and Outreach Plan | 18 | \$ 2,340 | | | | | | | | | | | 18 | \$ 2,340 |
| 3 Project Identity | 16 | \$ 2,080 | | | | | | | | | | | 16 | \$ 2,080 |
| 4 Project Communication Materials | 24 | \$ 3,120 | | | | | | | | | | | 24 | \$ 3,120 |
| 5 Community Outreach and Visioning | 80 | \$ 10,400 | | | | | | | | | | | 80 | \$ 10,400 |
| 6 Statistically Valid Survey | | | | | 100 | \$ 12,000 | | | | | | | 100 | \$ 12,000 |
| 7 Draft and Final Vision Report | 16 | \$ 2,080 | | | | | | | | | | | 16 | \$ 2,080 |
| 8 Fiscal Analysis: Levels of Service | | | 20 | \$ 3,800 | | | | | | | | | 20 | \$ 3,800 |
| 9 Fiscal Analysis: Service Delivery Alternatives | | | 20 | \$ 3,800 | | | | | | | | | 20 | \$ 3,800 |
| 10 Fiscal Analysis: Land Use Assessment | | | 4 | \$ 760 | 160 | \$ 20,000 | | | | | | | 164 | \$ 20,760 |
| 11 Comprehensive Plan Support | | | | | | | | | | | | | 0 | \$ - |
| a) Mandatory Elements | 58 | \$ 7,540 | 96 | \$ 18,240 | | | | | 78 | \$ 10,920 | 232 | \$ 36,700 | | |
| b) Optional Elements | 12 | \$ 1,560 | | | 8 | \$ 1,000.00 | | | | | 20 | \$ 2,560 | | |
| Project Briefings | | | | | | | | | | | 0 | \$ - | | |
| a) Visioning Process | 12 | \$ 1,560 | | | | | | | | | 12 | \$ 1,560 | | |
| b) Comprehensive Plan Support | 24 | \$ 3,120 | 8 | \$ 1,520 | 8 | \$ 1,000.00 | | | 8 | \$ 1,120 | 48 | \$ 6,760 | | |
| TOTAL COSTS | | | | | | | | | | | | | | |
| Labor Total | 280 | \$ 36,400 | 148 | \$ 28,120 | 176 | \$ 22,000 | 100 | \$ 12,000 | 86 | \$ 12,040 | 790 | \$110,560 | | |
| Direct Expenses | | \$ 500 | | \$ 100 | | \$ 100 | | \$ 100 | | \$ 100 | | \$ 900 | | |
| Subconsultant Fee (3% for project management and taxes on sub-consultants) | | | | | | | | | | | | \$ 3,344 | | |
| * Average billable rate | | | | | | | | | | | | | 790 | \$114,804 |



*Detailed Comprehensive Plan schedule developed separately

★ City Council Visioning Briefings Task Duration

◆ Public Visioning Workshop

● Commission Meetings