

Proposed Master Plan Update Scope of Work

GOAL

The Town of Lenox (“Lenox”) will engage a Consultant to assist in preparing an update to its 1999 Comprehensive Master Plan. Topic areas include Land Use, Housing, Economic Development, Open Space & Cultural Resources, Circulation and Complete Streets, and Town Services & Facilities.

The Consultant will provide high level guidance, insight and inspiration to the Steering Committee to develop an action-oriented Master Plan that will be accessible to Lenox residents in a user-friendly format, both online and in paper report form. The Steering Committee will be looking to the Consultant to propose creative ways for the Plan to be an actual living document used by Lenox leaders and residents to guide policy creation based on prior success stories from communities similarly situated to Lenox in terms of demographics and both economic resources and challenges.

To use the expert services of the Consultant in the most efficient and strategic way possible given limited resources, Lenox proposes to enhance the initial research and fact gathering phases of this project by creating Core Assessment Teams who will provide key issue analysis, overviews and guidance to the Consultant for each topic area. As described below, the Core Assessment Teams will accelerate the learning curve to get the Consultant up to speed on related efforts to date and focus the Consultant on the issues of most concern to Lenox leaders and residents.

SCOPE OF WORK

The Consultant will provide assistance to the Town of Lenox in preparing an update to its 1999 Comprehensive Master Plan.

The Consultant will report to the Lenox Land Use Director/Town Planner, the Planning Board, and the Steering Committee, and will facilitate regular steering committee meetings, facilitate public meetings and workshops, and provide direct technical planning services such as preparation and analysis of existing conditions within the Town of Lenox through data updates, analysis and stakeholder interviews. The Consultant will prepare a draft and final Master Plan document for review, comments, and adoption.

Task 1: Coordinate Activities of the Steering Committee

The Steering Committee will meet periodically during the course of the plan update to vet plan elements, preview draft materials, including materials for public meetings, and the like. The Steering Committee will be composed of various elected and appointed Town boards and committees as well as at large members who have made the time commitment to participate in the Master Plan update. The Steering Committee will include members of the Planning Board (or, if preferred, the entire Planning Board).

Task 2: Conduct Stakeholder Interviews and Meet w/ Core Assessment Teams

Working with the Steering Committee and staff, the Consultant will develop a stakeholder interview list and conduct interviews.

Concurrently, the Consultant will work with Core Assessment Teams, small groups of local experts or individuals with specific knowledge regarding the subject matter of each topic area. The Core Assessment Teams will meet with the Consultant in smaller group settings to discuss key findings from the existing plan documents and to develop key questions for the updated Master Plan to explore. This will include reviewing what's been accomplished to date from existing plans, identifying additional information needed to answer key questions, discussing their vision and goals for the Town, and identifying tools or resources they think will help the Town get there.

Task 3: Collect, Prepare, Analyze and Share Standard and Local Data Concurrent with Task 2, Collect, analyze and share standardized and local data to demonstrate what is different today in Lenox from the last Master Comprehensive Plan to identify challenges/opportunities in Lenox. The Consultant will provide the data and its independent analysis and review with the Steering Committee and at individual Core Assessment Team meetings. Standardized and local data will be used to inform existing conditions.

Task 4: Develop, Distribute and Analyze Public Survey using findings from Task 1, Task 2 and Task 3 to develop questions. The Consultant will be responsible for developing the survey, revising the survey based on Steering Committee feedback, and analyzing final results. The survey will be distributed in multiple ways to ensure broad outreach, including mailing out in property/water bills and online.

Task 5: Neighborhood Meetings

The Consultant will facilitate neighborhood meetings. These meetings can take a non-typical format such as neighborhood walks, a neighborhood potluck, a neighborhood charrette.

Task 6: Facilitate Up to 3 Town-wide Public Meetings

Meeting 1: Existing Conditions, Visioning and Goal Setting (present and confirm vision and goals drafted vetted by Steering Committee)

Meeting 2: Review goals by topical area, neighborhood stations

Meeting 3: Plan Presentation (stations set up by topical area, input solicited for ranking of priorities)

Task 7: Deliverables

Deliverables will include a written plan structured so that it is easily readable and also can be easily featured online. Up to 20% of funding (\$10,000) shall be reserved for editing and graphic design of the final written and online presentations.

An envisioned Table of Contents, which may be amended as the project is under way, includes:

- I. Plan on a Page: Vision for our Town, including what measures of success
- II. Plan on a Page: For each Core Element:
 1. Aspiration statement including what success will look like measure(s)
 2. Top goals/actions, listed in priority order, to be achieved over the next 10 years
 3. Succinct description of why we chose strategies and goals.
 4. Implementation

MORE DETAIL – the background, data and discussion behind each Plan on a Page:

5. Plan decision-making process – greater detail
 - i. Key findings (what do the data tell us) currently and regarding the future
 1. Key measures annually since 1999 – focus on those that are most important
 - ii. Discussion of the most meaningful policy questions identified including relevant data/measures to watch.
 - iii. Community engagement/Stakeholder input on the policy questions and how it helped guide ultimate goals
 - iv. Assessment of 1999 Plan accomplishments
 1. Key strategies, goals/actions, and targets
 2. Explanation of how/why we did or did not meet goals in 1999 plan – call out success factors, impediments in more detail
6. Appendix: Summary of the process used to complete the section, including stakeholders and actions involved
7. Appendix: Additional supporting studies, documents, or analyses

Task 8: Presentation to the Steering Committee and Planning Board for Adoption (Board of Selectmen as well)

The Consultant will be responsible for preparing a final presentation of the plan to the Steering Committee and Planning Board for adoption.

Task 9: Assist the Steering Committee and Land Use Director/Town Planner in Ongoing Outreach and Community Engagement at Lenox community events such as the Apple Squeeze, Town Meeting, the Farmer's Market, etc.

Task 10: Facilitate an Implementation Meeting to share the Implementation Program. This meeting can take a non-typical format such as a community potluck, a charrette, a block party, etc.

REVISED TIME LINE

Award Contract: July/August 2018

Project Completion: December 2019

UPDATE TEAMS

Steering Committee

12-15 members, including representatives from all appointed/elected Town boards/committees (including the Planning Board).

Will review draft materials, vision, goals as plan is developed.

Will help w/ outreach as plan is developed.

Land Use Director/Town Planner

The Lenox Land Use Director/Town Planner will provide the roll of project manager and will be the key contact for the Consultant.

Planning Board

Legally responsible for creating, maintaining and updating the master plan and will need to vote to approve the Master Plan.

Core Assessment Teams

Experts in the community will review existing plans available and participate in core assessment meetings with the consultant. These core assessment meetings will feed into existing conditions analysis, data collection and analysis, development of the most meaningful policy questions, and into plan materials to be reviewed by steering committee.

- 1) Land Use: review land use element of last plan
- 2) Housing: review Housing Production Plan
- 3) Economic development: review 1998 economic development survey and memo, meet with business community
- 4) Natural, Cultural, Open Space and Recreation Resources: review Historic Preservation Plan as well as Open Space & Recreation Plan, and review Columbia University students' sustainability memo to the Town of Lenox
- 5) Services and Facilities: meet with DPW, Water, Wastewater staff, Town Manager, and Permanent Building Committee
- 6) Circulation: review Complete Streets plan document, meet with DPW, Chief of Police and Town Planner to discuss ongoing work challenges, opportunities and future projects.

Outreach Team

A sub-committee of the steering committee will assist with outreach and community engagement to ensure broad awareness of the Master Plan update through its development and implementation.

The outreach team will work with the Land Use Director/Town Planner and Consultant to prepare materials, attend community events and meetings to share information about the Master Plan and solicit broader community feedback.

Consultant

The Consultant will be responsible for:

Convening and Conducting Periodic Steering Committee Meetings
Convening and Conducting Core Assessment Meeting

Facilitating Public Meetings

Providing draft plan materials to the Steering Committee and Core Assessment Teams in advance of meetings in timely fashion

Incorporating steering committee and core assessment team feedback into plan revisions as plan is developed

Preparing materials for public meetings

Providing data, analysis and key findings to Steering Committee for review in order to see what has changed since the last Master Comprehensive Plan and where the Town is today

Provide additional information identified by Core Assessment Teams and Stakeholders to be significant to decision-making.