



LEVINE PLANNING STRATEGIES

Tools for Building Communities

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APPENDIX C: WORK PLAN AND PAYMENT SCHEDULE

This project will be broken into three phases, consistent with state requirements for Comprehensive Plans under the Comprehensive Planning and Land Use Regulation Act of 1988 as amended (Title 30-A MRSA Sec. 4301 etc.) The Consultant's general responsibilities for each item, as well as City responsibilities, are outline below each item.

I. **Data Collection (\$25,000 total)**

For each of these sections, the City will be responsible for providing the Consultant with existing information that is currently available at the local level, as well as providing the Consultant with a base map of the City in ArcGIS format for use in this project. The City will also provide any materials that were developed as part of the previous Comprehensive Plan. The Consultant will be responsible for (a) gathering data from the U.S. Census and other state and federal sources as readily available; (b) producing a draft report for each section; and (c) after feedback, drafting a final report for each section. If data required for a plan consistent with state requirements is not readily available, Consultant and City will discuss how to collect that data outside the scope of this contract.

- a. *Existing Land Use* (\$3,000): The Consultant will provide guidance to the City for use in completing an up-to-date inventory of local development. The Consultant will complete an analysis of locally-collected data to summarize significant trends in land use and identify where incompatible land uses are occurring.
- b. *Population and Demographics* (\$3,000): The Consultant will prepare a demographic overview of a town's population. The report will include information on population trends and characteristics, education, number of households, household size and household income, based on most recent figures available. The report will provide an analysis of reasons for identified trends. It will also provide projections of future growth to 2040.
- c. *Economy* (\$3,000): The Consultant will collect state and federal economic data into a statistical profile of the local and regional economy. The Consultant will assess local information and prepare the report, identifying planning issues for the local economy and a projection of job demand to 2040.
- d. *Housing* (\$3,000): The Consultant will compile statistical information and produce an analysis of trends in affordability and availability of housing in the City. Data will include most recent Census numbers on housing units, structure type, tenure, occupancy, unit size, cost, age, and vacancy rates, as well as MaineHousing data on affordability, demand, and programs to address housing. The Consultant will integrate this data with local information for a report on planning issues, including projections of housing needs to 2040.
- e. *Transportation* (\$3,000): Based on information provided by the City and other readily-accessible sources, the Consultant will provide inventory and analysis of state-managed local and regional transportation infrastructure, including roads, bridges, sidewalks, and

transportation enhancements. This work will incorporate local information and identify planning issues.

- f. *Public Facilities and Services* (\$2,000): The Consultant will review the public facilities and services information provided by the City and prepare an analysis of planning issues to be addressed. The Consultant will integrate locally-produced material into a comprehensive report.
- g. *Historic and Archaeological Resources* (\$2,000): The Consultant will provide guidance for a descriptive overview of local resources and will provide an analysis of planning issues.
- h. *Water Resources, Agricultural and Forest Resources* (\$2,000): Based on inventory provided by the City, the Consultant will outline local and regional natural resource assets and constraints and prepare a report and analysis of planning issues related to natural resource protection.
- i. *Recreation* (\$2,000): The Consultant will compile information provided by the City and additional data on regional recreational facilities into an inventory and report.
- j. *Fiscal Capacity and Capital Investment Plan* (\$2,000): The Consultant will incorporate City documents regarding operating and capital budgets and the overall fiscal health of the City into an inventory and report.

II. Public Involvement and Future City Vision Development (\$10,000 total)

- a. *Public Outreach Phase 1* (\$4,000): The Consultant will develop a public outreach strategy to be launched in early spring as Phase I work is well under way. Implementation of that outreach may include attendance of the Consultant or other representatives at neighborhood meetings, farmers' markets and other public events. There will also be one large public event the Consultant will attend and manage. The logistics of that event will be organized by the City. Note that this part of Phase II will take place early in the process, likely while Phase I is still being completed.
- b. *Development of Draft City Vision* (\$1,500): The Consultant will compile the information developed to date into a draft City vision for presentation to the Comprehensive Plan Committee and other stakeholders as appropriate.
- c. *Public Outreach Phase 2* (\$3,000): The Consultant will mirror a subportion of the successful parts of the first public outreach phase with additional information about the City's vision and ideas for implementation. There will also be one large public event the Consultant will attend and support. The logistics of that event will be organized by the City. Note that part of this process will likely take place during Phase III.a. below.
- d. *Development of Final City Vision* (\$1,500): The Consultant will compile the information developed to date into a final City vision for presentation to the Comprehensive Plan Committee and other stakeholders as appropriate.

III. Plan Development and Publication (\$15,000 total)

- a. *Goal and Policy Statements* (\$3,500): The Consultant will turn the final City vision, incorporated with planning issues identified previously in Phase I, goals and policy statements.
- b. *Future Land Use Plan* (\$4,000): The Consultant will develop a future land use plan based on current land uses, trends, the City's vision statement and goals & policy statements.
- c. *Capital Investment and Implementation Plan* (\$2,500): An implementation plan with an order-of-magnitude capital investment plan will be developed by the Consultant. The City will provide input into this plan and provide cost estimates when needed.
- d. *Final Plan Drafting* (\$5,000): The Consultant will produce a final plan incorporating information from previous phases. This will include submission of a high-quality electronic version of the plan and 10 hard copies.

Meetings

The project budgets for 12 monthly meetings in person in Hallowell with the Comprehensive Plan Committee as well as an additional three in-person meetings during the course of the project. Project budget for each meeting is \$1,000, inclusive of reasonable meeting preparation, attendance, reasonable follow-up work, general project management, and travel expenses. The City is responsible for room reservations, copying of materials, and other general administrative work related to each meeting.

Project Schedule

The expected schedule for this project is as follows:

- I. Data Collection:** January 2020-June 2020
- II. Public Involvement and Future City Vision Development:** April 2020-March 2021
- III. Plan Development and Publication:** August 2020-June 2021

Payment Schedule

Tasks include a fee for completion. For *Data Collection items in I.* and *Plan Development and Completion items III. a-c*, 50% of that fee will be due upon submission of a draft document, with the balance due upon completion of the document. For *Meetings*, the fee shall be paid in the next invoice following completion of the meeting. For *Public Involvement and Future City Vision Development in II*, 50% of the fee will be due mid-way through the task, with the balance due upon task completion.

State Certification: On task *III.d. (Final Plan Drafting)*, 50% will be due upon submission of the Plan to the City. The balance will be due when the state certifies the Plan. If the State does not certify the Plan due to reasons outside the control of the Consultant, the balance will be paid 90 days after submission of the Plan to the State, or when the State notifies the City of the reasons, whichever is later.

Total Compensation

- \$28,000 is currently funded. This amount is expected to cover \$18,000 towards the Data Collection phase as well as \$3,000 towards the Public Involvement Phase and \$7,000 towards meetings in FY2020.
- An additional \$37,000 based on funding availability that is expected to fund the balance of the project as outlined above.