

General Plan Update Briefing

[KA] Khalid Afzal, Special Projects Coordinator, Director's Office khalid.afzal@montgomeryplanning.org, 301-495-4650

[Cm] Caroline McCarthy, Chief, Research & Special Projects, caroline.mccarthy@montgomeryplanning.org, 301-495-4506

[GWS] Gwen Wright, Director, Montgomery County Planning Department, gwen.wright@montgomeryplanning.org

Completed: 07/05/2018

Introduction:

The General Plan for Montgomery County, also known as the Wedges and Corridors Plan, was originally adopted in 1964, "A General Plan for the Maryland-Washington Regional District in Montgomery and Prince George's Counties". It was last comprehensively updated in 1969, "Updated General Plan for the Maryland-Washington Regional District in Montgomery County Maryland", with a subsequent refinement to its goals and objectives portion in 1993, "General Plan Refinement of the Goals and Objectives for Montgomery County". Staff will present additional detailed information about the history and the goals of the General Plan during the Board's briefing.

The Planning Department's approved FY19 Work Program includes a major planning effort to update the county's General Plan. At today's briefing, staff will present a brief history of the General Plan; the issues, trends, and challenges facing the county in the next 30-40 years that have been identified to date; and a brief outline of how we intend to undertake this update.

Why Update the General Plan?

The Wedges and Corridors Plan is widely recognized as one of the country's most significant long-range planning documents. It has stood the test of time, influencing the county's growth and planning policies over the past 54 years and underpinning all of the county's planning initiatives and master plans.

The '64 General Plan and the '69 Update were done during a time of great change for the county and the region. These documents reflect the perspectives of the 1960s, which was a very influential time in history. However, the county has continued to evolve and change – and we are again at a point where we are looking at ways to address and manage major changes. Montgomery County has gone from a bedroom community to a major employment center with an extremely diverse population of more than a million people living in urban centers, suburban communities and rural areas. We are entering an era of far reaching technological innovations, and economic and demographic changes create a need to rethink our vision for the future of the county to keep it in the forefront of economic trends, maintain its competitive edge, and preserve the quality of life for which the county is known. The goals of the General Plan -- efficient use of land, preservations of open spaces, opportunities for outdoor recreation, protection of environmental resources, an efficient transportation system, and a variety of living environments, among others -- are as valid today as they were in 1964 but need to be updated in light of

the technological, social, environmental and economic changes that have occurred since the Plan's adoption.

Other jurisdictions more frequently update their general plans (also called comprehensive plans). Some do it because they are required by law, but others desire to keep them more current to today's policy issues. The following communities in the region are updating, or have recently updated, their general plans:

- Washington DC is currently updating its comprehensive plan, which was last updated in 2011 (and before that in 2006; it is required to be revisited every 4-5 years).
- The State of Maryland adopted its state development plan—Plan Maryland-- in 2008 and is currently in the process of updating it.
- Prince George's County updated its general plan (Plan 2035 Prince George's) in 2014.
- Howard County's general plan, PlanHoward2030, was updated in 2012, and further amended in May 2017.

We are looking at these and other plans from around the United States to understand best practices in doing general plan updates, which will be featured in a Winter Speakers Series in early 2019.

The Pre-Plan Stage

Updating the General Plan for the county is a huge effort, and we want to make sure we are approaching it carefully by developing a well-thought out plan for the entire effort before we jump into it. The Planning Department has hired Rhodeside & Harwell to help develop: 1) a strategic framework, which will define the overall themes and the main focus of the update to guide the subsequent detailed work program; and 2) a comprehensive communication strategy about how the whole effort will be communicated in innovative ways to maximize meaningful stakeholders' engagement.

The consultant team is led by Rhodeside & Harwell, a landscape architecture and planning firm based in Alexandria, VA. The team also includes Foursquare ITP, a transportation planning firm based in Rockville, and Clarks Concept, a visual communication and outreach firm, also based in Rockville. All three firms have worked extensively in Montgomery County and the region on similar projects. Their work will last approximately six months. A detailed description of the consultant's proposed Approach and Methodology is attached; it will be further refined based on initial meetings between staff and the consultant team. After the consultant's work is complete, in Spring 2019, staff will present to the Board for comments and approval a Scope of Work, which will outline a detailed list of tasks and a timeline for conducting the General Plan Update.

The Plan

It is anticipated that this update will take two to three years. Important components of the update will include: demographic and economic assessments and analyses; discussions of transportation and environmental issues as well as unique challenges related to resiliency and equity; and – most importantly – an overall consideration of the vision for future growth and change that will enable the communities in the county to thrive while maintaining their unique identities. It is important to note that no zoning changes or Sectional Map Amendment will result directly from this plan update as it will not make any specific zoning recommendations. However, it will likely provide guidance about future

work on master plans, sector plans, and minor master plan amendments that can address land use issues.

Staff will work to engage the Board, elected and appointed officials, residents and community groups, and all interested stakeholders in the update effort. The briefing today is simply an introduction to the project and staff anticipates many future opportunities for Board's input and involvement.

Attachments

1. Consultant's Proposed Methodology and Approach

METHODOLOGY AND APPROACH TO THE PROJECT

Understanding of Need



Montgomery County is a center of growth and change with regard to demographics, population growth, economic development, density of development, transportation trends, and other evolving characteristics. Accordingly, given the degree of change that has occurred in both the region and the County since the County's seminal 1964 plan (and the 1969/1993 updates), it is time to revisit Montgomery County's General Plan documents, to "test" the current relevance of the earlier plans' assumptions. As a first step in this process, and prior to launching into the Plan update itself, the County wishes to develop a Strategic Framework and Communications Strategy to facilitate discussions, address existing and future trends, and define a vision and goals for the General Plan update process.

The Planning Department is not looking for the strategic framework and communications strategy to include a "typical" approach for vision planning. The General Plan update will require an innovative approach that takes into account all of the work that has been completed since the 1964 Wedges and Corridors Plan, including the General Plan updates/refinements from 1969 and 1993, the 2014 Zoning Code Update, master plans and other planning initiatives, and past and ongoing research projects (such as the trends studies being completed right now by the Department). The planning approach must also reflect the need to gather meaningful, forward-thinking input from the County's diverse set of residents and other stakeholders. In addition, we know that the General Plan update will not address some issues. For example, given the many master plans that have been completed in the County, the General Plan will not include neighborhood level analyses, or proposed land use changes; instead, it will focus on major policy issues facing the County over the next 30-40 years. In addition, there are some policies that will not be revisited in the General Plan Update; for example, the Transfer of Development Rights program that allows the agricultural preserves to remain protected.

The Strategic Framework will not only contain a process for the General Plan update; it will also provide a theme, or set of themes, based on stakeholder interviews. The theme/themes may be centered on one or more topics around which the General Plan can be structured- e.g., mobility, economic prosperity, affordability, equity. We know that the Department does not intend, at this time, to redefine the main development goals of the General Plan - the wedges and corridors, for example - but that there are emerging and/or existing issues that may require more focus. For example:

- Redevelopment (transition from typical suburban development to higher-densities and more intense mixes of uses, users, and generational variety, particularly in those corridors where there is significant development pressure)
- Ensuring and furthering social equity in the context of changing demographics and increasing economic gaps
- Preparing for a transition to a connected, automated, Mobility as a Services (MaaS) future, which will require development of guidelines and policies to maximize the positive impacts of these tech changes while avoiding potential negative impacts

METHODOLOGY AND APPROACH TO THE PROJECT

Understanding of Need



While the Strategic Framework will provide an overall theme and structure to the General Plan process, the Communications Strategy will ensure that the General Plan Project Team is prepared to interact with the wide range of stakeholders typical to Montgomery County, one of the most diverse locales in the country. The communication strategy must actively foster a productive dialogue that minimizes conflicts among participants and leads to a shared, inspired vision and a set of goals for the future. To do this, we know that the County must go way beyond traditional public meetings and online communications. It will require encountering people where they are, both physically and philosophically, in-person and via various media. We will work with the Department to develop a range of communication tools tailored to the stakeholders and audiences that the Department will need to reach in order to achieve representative and equitable participation, and in order to reach people who may be considering a location in Montgomery County, but are not yet there. Our process will include a range of tools, with a step-by-step outline for engaging with all stakeholders, but will also allow for flexibility to benefit from new opportunities and the need to react to new information.

The process that follows builds on the knowledge and experience of our three firms. All three firms - Rhodeside & Harwell, Foursquare ITP, and Clark Concepts - have worked in Montgomery County, its neighboring jurisdictions, and nationally. We bring local on-the-ground experience, creative thought, and an understanding of how other jurisdictions are tackling similar emerging planning needs.

With this RFP, you are seeking a set of partners to collaborate with the Planning Department to define an important first step in the General Plan update process. With expertise not only in communications, but also in planning at the scale of Montgomery County, our team is uniquely suited for this task.

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

TASK 1: KICKOFF MEETING

Task 1.1: Kickoff Meeting at M-NCPPC

The consultant team will meet at the M-NCPPC office with the Planning Department General Plan Project Team. Goals for this meeting include:

- Clearly defining the vision, goal, and expectations for the project.
- Identifying key stakeholders, including internal, County stakeholders, and external stakeholders from non-County organizations (through review of the list provided by the Planning Department and a brainstorm of potential additions).
- Determining the appropriate engagement strategies for different types of stakeholders.
- Refining the schedule, including necessary review processes.
- Identifying available documents and resources.
- Gaining a shared understanding of all of the expectations, purposes, and legal requirements for the County's General Plan.

The agenda for the meeting will be finalized in association with the Planning Department, but will include discussion of:

- Major elements of the project, including deliverables.
- Other planning efforts that are underway.
- Comparable examples/inspirations.
- The history of the General Plan as it has evolved over time.

We suggest that this meeting also be used to identify many of the key stakeholders to participate in a cross-department Advisory Group for this process. This group can be used, along with the General Plan Project Team, to gather input and test concepts and ideas. While this Advisory Group was not suggested in the RFP, we believe that engaging with a cross-department group during this process (and, potentially, continuing through the General Plan update process) could be crucial to presenting a countywide coordinated approach regarding the vision for the General Plan. We understand that the Project Team is not yet created; if the intent is to have a cross-department Project Team, there would likely not be a need for an additional Advisory Group.

Task 1 Products:

- Meeting minutes that include an understanding of the goals of the project, available resources, major tasks, key stakeholders, final products, and schedule.

TASK 2: REVIEW PREVIOUS PLANS, STUDIES, AND RELEVANT DOCUMENTATION

Task 2.1: Document Review

The consultant team will review previous studies and documentation related to the General Plan and its 1993 refinement.

- These documents will be detailed further at the kickoff meeting (described in Task 1). The team will compile a list of documents reviewed and a paragraph summarizing any key findings from each document.
- The Planning Department has conducted and summarized input from interviews with planners outside of Montgomery County who have recently conducted General/Comprehensive Plan updates. The consultant team will review findings from these interviews and compile a summary of what was successful and why, and how this information may be applicable to the Montgomery County General Plan Update process.

Task 2 Product:

- List of documents reviewed.

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

TASK 3: STAKEHOLDER MEETINGS

We proposed a three-pronged approach to County stakeholder engagement conducted as part of the Strategic Framework development process.

Task 3.1: General Plan Project Team Meetings

The consultant team will meet with the General Plan Project Team at least three times during this process.

1. Early on, prior to any other meetings, we will discuss the practical, on-the-ground opportunities and challenges, determine what has worked/not worked regarding the existing General Plan, and get input to inform development of goals and objectives
2. Later in Task 3, after the initial phase of meetings, we will meet to discuss draft alternative approaches to developing a strategic framework.
3. At the end of the Task 3, we will meet with the Project Team to debrief, share a summary of findings, and discuss next steps.

Task 3.2: Advisory Group Meetings

The consultant team will meet with the proposed project Advisory Group at the beginning and end of the Task 3. This group can be used to obtain input and test concepts within the context of a multi-disciplinary environment.

Task 3.3: Other Stakeholder Meetings and Engagement

The consultant team will hold two phases of meetings with key stakeholders outside of the formal General Plan Project Team and Advisory Group, and identified at the kick-off meeting, to include an initial round of gathering input and a subsequent round of reviewing input and gathering feedback. We would also like to conduct an electronic survey prior to the meetings in order to reach a broader range of key stakeholders in an in-depth manner. We will discuss the list of stakeholders to be engaged during Task 1.

- Survey: The team will conduct an electronic survey using SurveyMonkey or similar software. This survey could both be sent to key County employees and elected officials, or it could be sent only to those participating in the meetings as part of Task 3.3. We would use this survey to gauge initial thoughts about departmental goals and visions related to the General Plan, as well as first impressions of the priorities likely to be identified by the general public. The results of the survey will be shared and used as a starting point for the discussion at Phase I meetings.
- Phase I: Individual departments/organizations, or small groups. These discussions may be opened up to include stakeholders who are outside of the County government.
- Phase II: Fewer, consolidated meetings. May be conducted with larger groups that contain representatives from different departments/organizations. This will provide the team an opportunity to discuss/debate priorities and trade-offs.

The Montgomery Planning Department will coordinate scheduling of and locations for the meetings, and will cluster meetings on set days whenever possible.

Task 3.4: Summary of Meeting Input

The team will summarize all survey and meeting input for use during Task 4. High-level findings from Task 3 can also be included as part of the final report, though individual comments will be anonymous.

Task 3 Products:

- Development of questions for interviews/meetings
- 20-30 stakeholder interviews/meetings
- Summary of meeting input and discussion of how the findings will be used in Task 4 to define the Strategic Framework

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

TASK 4: DEVELOP AN OUTLINE OF THE STRATEGIC FRAMEWORK

Task 4.1: Consultant Team Work Session

The consultant team (sans General Plan Project Team) will hold a day-long work session to develop an initial outline for the strategic framework, including several alternative approaches and concepts (themes and focus areas), and a timeline.

Task 4.2: Meeting with General Plan Project Team and Advisory Group

The consultants will meet with the Project Team and Advisory Group to discuss initial concept alternatives developed at the work session and decide on a concept, or revisions to be made on multiple concepts.

Task 4.3: Refine Final Preferred Alternative Framework

The consultant team will refine the preferred alternative for the Strategic Framework outline.

Task 4 Product:

- An outline of the approach/concept alternative, and timeline for the strategic framework, with a proposed area(s) of focus and theme(s) for the General Plan Update

TASK 5: RESEARCH AND DEVELOP THE COMMUNICATION STRATEGY

Task 5 is the official start of the second half of this process: the development of the Communications Strategy. Throughout the development of this Strategy, we will keep in mind the Strategic Framework outline. If and when the Strategic Framework needs to be adjusted to accommodate the Communication Strategy, we will discuss that need with the General Plan Project Team.

Task 5.1: Discovery Session Meeting

The consultant team will have a Task 5 kick-off "Discovery Session" meeting with representatives from both the General Plan Project Team and potentially additional Montgomery Planning Department Communications staff. At this meeting, we will gather input about approaches used previously in Montgomery County (and their levels of success), and new/revised approaches that both teams would be interested in trying. We will also discuss the audiences for the General Plan, lessons learned from previous interactions with these audiences, and ideas about goals and metrics related to outreach.

Task 5.2: Identify Audiences, Opportunities, Challenges, and Goals for the Communications Strategy

Before diving into specific strategies, we will make sure that we know who the different audiences are for communications related to the General Plan update process, as well as opportunities and challenges related to communications. We will also establish goals and metrics for measuring the success of the Strategy.

The Audiences: Who we are Trying to Reach

Through our profile research, we will explore and establish specifically our target audiences (residents, employers, non-profits, developers, and potentially others) as well potential partners who will assist in critical messaging. Our team will perform the necessary research to analyze the situation and address each audience's specific needs, in terms of potential interests and concerns and potential effective communication approaches, as well as potential outreach challenges. The plan will include specifics on strategy, how to reach the audience(s) for each market, what should be produced for each outreach strategy, how and when to execute on the deliverables (outreach/marketing schedule), and how to measure success.

Opportunities and challenges

To better understand the issues to be addressed, and potential tools for doing so, the team will identify opportunities and challenges related to implementation of a successful communications process, based on the information gathered at the Discovery Session (Task 5.1), information from documents/studies reviewed, and other supplemental research.

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

- Examples of opportunities: potential partners and stakeholder groups who may be able to help champion the plan and spread the messaging related to the General Plan and opportunities for positive visibility
- Examples of challenges: opponents who may serve as impediments to the success of the plan and process, communities that have proven to be very challenging to reach in Montgomery County (for example, these may include communities with language barriers), and those who feel negatively about planning processes in general

Goals and Metrics

Based on the information we've gathered to this point, we will establish/refine specific goals and metrics for the communications effort. These would align with an overarching goal to gain community understanding of the planning process and purpose of the General Plan, as well as to build excitement, foster support, and draw participation in the process.

The plan will include details for measuring success, i.e., how to track results. Effective marketing and communications plans have a dynamic element; they're not "etched in stone". We will ensure that our process allows for fluidity to adjust efforts on a regular basis, as needed, to achieve optimal results – such as reaching specific targeted communities, defined numbers of people, etc. We will provide draft ideas for goals and metrics that we will then discuss with the General Plan Project Team.

Task 5.3: Compile a Tool Kit of Communication Strategies

The consultant team will research and analyze different methodologies and web-based tools for marketing and implementing the strategic framework, and for reaching consensus in developing the vision and goals for the General Plan process and its update. The community can engage in many ways while learning about the vision for Montgomery County and how they can get involved. Our plan will include several "touch points" for connecting with the Montgomery County community in general, as well as targeted ways to reach each audience identified in Task 5.2.

The communications strategy will contain several components:

Key themes and message frames: These will utilize the theme(s) developed for the Strategic Framework and create a narrative and messaging points for each.

Public relations tools and strategies: This may include media pitches, stories and narratives, a social media/digital strategy, advertisements (print, web, radio, buses and bus stops, Metrorail trains and stations, etc.), and flyers/posters (including FAQ information).

Community interaction/engagement opportunities: both online and in-person. The team will compile and assess potential strategies for involving the public and gathering feedback, keeping in mind the specific goals identified for this process. To assess the appropriateness of each strategy related to Montgomery County, the team will identify the advantages (e.g., including the specific audiences to be reached) and the disadvantages (e.g., cost per interaction) of each. Strategies may include, but will not be limited to:

- General in-person strategies: pop-up meetings (at festivals, parks, Metrorail stations, breweries, etc.) workshops, charrettes, community conversations, public forums and debates, and public video stations "in the neighborhoods."
- Focused in-person strategies: focus groups, small group discussions and interviews, targeted workshops, expert panels, phone surveys, mailings, outreach at ongoing community meetings, and student/youth engagement.
- Web-based tools, many of which may be seamlessly incorporated into in-person engagement: websites, web forums (e.g., Bang The Table), social media, surveys/polls (e.g., PollEverywhere, Metroquest, SurveyMonkey), interactive maps (e.g., Wikimapping), online "gaming," etc.

Branding the message, including visuals needed to describe a "brand platform," building on the key theme(s) identified in the Strategic Framework. The plan will include recommendations for branding elements (rough concept development and design of graphic elements), messaging, and tag lines to reach specific markets as well as the media.

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

This "Branding Platform" is a big picture "snapshot" of the outreach campaign, demonstrating the brand consistency across all marketing channels. Support for branding includes, but is not limited to, the following:

- Identifying and recommending ways to implement the new brand/campaign and additional visibility opportunities
- Social media/website strategy and development of content
- Digital marketing strategy/plans
- Brand "rollout" plan: This plan includes specifics such as where and when to implement the new plans.

A timeline for implementation: Our process will include a range of tools, with a step-by-step outline for engaging with all stakeholders, but will also allow for flexibility to benefit from new opportunities and the need to react to new information.

Goals and metrics to measure the success of the process: The communications plan does not need to be static. By including goals for outreach, and metrics to measure the success of reaching those goals, the General Plan Project Team will be able assess on a regular basis whether there is a need to revisit the communication strategy.

Our team already has a "jump" on the local outreach opportunities as well as reaching diverse communities through our local work, including Clark Concepts' efforts supporting Montgomery County's Bus Rapid Transit (BRT) outreach. We are well-versed in identifying targeted outreach events, and reaching specific ethnic communities in the County through specific publications and websites.

Task 5.4: Create a Draft Communication Strategy Outline and Plan

Following the compilation and assessment of strategies, the consultant team will create a draft approach comprising:

- Detailed implementation steps outlined within the framework of the overall General Plan update timeline, including information about what we hope to achieve through each action at each stage of the planning process.
- Allowances for flexibility in the process, to capitalize on engagement opportunities if/when they arise.
- Goals for outreach, with metrics to measure the success of the communication strategy.
- An estimate of staffing and resource needs to implement the program.

We will provide a framework for implementing strategies in ways that encourage feedback by stakeholders who are representative of the demographics of the County. All members of the team are committed to tailoring the communications strategy to the specific needs of the County's demography. Team member Foursquare brings a prime example of this tailoring in their work with WMATA. For that agency, Foursquare created WMATA's Public Participation Plan, which contains specific guidelines for clearly-defined segments of the population in the WMATA service area. Our team can apply a similar approach to planning demographically-responsive engagement in Montgomery County.

Task 5.5: Meet with the Project Team and Advisory Group

The consultant team will review the draft Communications Strategy with both the General Plan Project Team and Advisory Group to obtain feedback.

Task 5.6: Revise the Draft Communication Strategy

Revise the Strategy based on feedback from the Project Team and the Advisory Group.

Task 5 Product:

- An outline of the comprehensive communications strategy with a detailed step-by-step description of the materials, resources, and primary/secondary audiences.
- An audience profile for each group and activity.
- A list of influencers for the marketing program.
- Staffing and resource needs for each stage of the outreach program.
- Description of how the communications strategy will fit in with the other tasks and timeline of the General Plan Update.

METHODOLOGY AND APPROACH TO THE PROJECT

Methodology

TASK 6: DRAFT REPORT - STRATEGIC FRAMEWORK AND COMMUNICATIONS STRATEGY

Task 6.1: Create a Draft Report

The consultant team will compile the Strategic Framework and Communications Strategy into a draft report. The document will contain a summary of the process used to develop the strategies, and will detail an Action Strategy for moving forward with the General Plan.

Task 6 Product:

- Draft report outlining the strategic framework for the General Plan Update, including major themes and tasks, and a detailed layout of the full communications strategy with a description of software and hardware tools needed (including potential costs), number and type of events and locations, and a schedule of major milestones for the entire process. The draft report will identify opportunities and challenges, as well as the implications of possible strategies; and will clearly state the main goals for the strategic framework, how those goals will be achieved, and an overview of the objectives or measurable steps to evaluate whether the process is successful or should be modified.

TASK 7: FINAL REPORT

Task 7.1: Meet with the General Plan Project Team

The consultant team will meet with the Project Team to review comments on the draft report.

Task 7.2: Revise the Draft Report

The team will revise the draft report, as needed.

Task 7.3: Final Review and Revisions

The team will send the document to the General Plan Project Team for final comments, and will revise as needed.

Task 7 Product:

- Final report with two distinct parts: a Strategic Framework and a Communications Strategy.

TASK 8: PRESENTATION TO PLANNING BOARD

Task 8.1: Present to the Planning Board

The consultant team will present the Strategic Framework and a Communications Strategy to the Planning Board for review, discussion, and approval.

Task 8 Product:

- Presentation for the Planning Board.