MONTGOMERY COUNTY PLANNING DEPARTMENT
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

MCPB
Item #
Date: 5/30/19

General Plan Update Scope of Work

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Completed: 05/23/2019

Staff Recommendation:
Approve Scope of Work for the General Plan Update

Summary

Montgomery County has grown in the past 50 years from a bedroom community to a major employment center with a diverse population of more than one million people. Technological, social, environmental and economic changes require the county to keep pace with these advancements, while setting a course for its future. Recognizing the changes that have taken place, and that there are others to come, Montgomery Planning has embarked on a comprehensive update of the county's General Plan, which was last updated comprehensively in 1969 and subsequently amended by a limited refinement of its goals and objectives in 1993 and numerous local area and countywide functional master plans since 1969. This memorandum presents the Scope of Work for the General Plan Update and describes staff's conceptual approach and an outline of the work program that will culminate in a Planning Board draft of the update to be delivered to the County Council in March 2021.

THRIVE
MONTGOMERY 2050
Let's Plan Our Future. Together.

Scope of Work
May 30, 2019

Contents

INTRODUCTION

Background

A General Plan is a policy document that guides, over multiple decades, how a jurisdiction will develop and change over time, maintain its important assets and respond to future opportunities and challenges. Unlike a sector plan, master plan or functional plan, a General Plan does not provide specific land use guidance to address short-term issues in targeted geographic areas, it does not change zoning, and it addresses multiple topic areas rather than just one. A General Plan is a long-term vision with broad policies that will guide future, more detailed land use planning, public investments in infrastructure and community amenities, and private development.

The first General Plan for the entire county, *On Wedges and Corridors, A General Plan for the Physical Development of the Maryland-Washington Regional District in Montgomery and Prince George's Counties* (the '64 plan or the Wedges and Corridors plan), established the foundation of land use planning for Montgomery County in 1964. It is widely recognized as one of the most significant long-range plans of the past 50 years. Its famous concept of wedges and corridors shaped the physical development of the county and, along with subsequent amendments by area and countywide functional master plans, helped transform the county into an economic engine of the state of Maryland with a population of more than one million people living in urban, suburban and rural communities.

The '64 plan was a visionary and aspirational document. It did not have specific implementation mechanisms to fully realize its goals and objectives. In 1969, the *Updated General Plan for the Maryland-Washington Regional District in Montgomery County Maryland* (the '69 plan), a comprehensive amendment to the Montgomery County General Plan, refined the goals of the '64 plan and included specific recommendations and accompanying zoning mechanisms to carry out the plan's goals and policies.

The '69 plan was the source of numerous subsequent planning and regulatory initiatives. These mechanisms included the 1973 Adequate Public Facilities Ordinance to implement the '69 plan's recommendation of providing timely infrastructure and, in 1974, the Moderately Priced Dwelling Units law to address the '69 plan's recommendation to address housing affordability for a growing county. Another significant initiative to come out of the '69 plan was the 1980 *Preservation of Agriculture and Rural Open Space Functional Master Plan*, which established the Agricultural Reserve (the Ag Reserve) of more than 93,000 acres in the northern and western parts of the county.

The 1993 *General Plan Refinement of the Goals and Objectives for Montgomery County* ('93 Plan Refinement) updated the goals and objectives of the '69 general plan. It reaffirmed the wedges and corridors concept as the county's development framework and delineated the character and location of its four geographic components: the Urban Ring; the Interstate-270 Corridor; Suburban Communities; and the Wedge, further refined into Residential and Agricultural Wedges.

The county's General Plan is a living document. Although there have been no comprehensive amendments to the General Plan since 1969, the Plan has been amended through numerous master plans, sector plans and countywide functional plans completed since the 1960s. Under the Maryland law, each master plan, sector plan or functional plan amendment updates the General Plan.

Why Update the General Plan?

The General Plan informs the overall growth and development in Montgomery County, the types of community facilities and amenities that serve residents and businesses, the protection of environmental resources and the ways we travel throughout the county. The goals of the '64 General Plan -- efficient land use, preservation of open spaces, opportunities for recreation, protection of environmental resources, an efficient transportation system and a variety of living environments -- continue to be relevant and essential.

But the rapid technological, social, environmental, demographic and economic changes now occurring necessitate a fresh look at the long-range planning framework for Montgomery County to ensure that the county remains a vibrant and welcoming place where all can thrive over the next 30 years. This focus on creating a vision for a thriving Montgomery County in the future is why we are calling the General Plan Update project "**Thrive Montgomery 2050**."

The county has changed significantly from the auto-oriented, greenfield developments of the 1960s and 70s, into mature suburban developments and multi-modal, dense urban areas. We now must plan for a very different county than what existed exist 50 years ago, and we are facing new and different trends affecting the future.

The purpose of Thrive Montgomery 2050 is to incorporate the latest thinking and best planning practices to address the evolving nature and impacts of new trends and challenges and help the county maintain its competitive edge and thrive over the next 30 years. The future growth and development in the county will be characterized by infill and redevelopment, not greenfields. Combined with the emerging trends and challenges, the new paradigm requires a mindset change in how we plan for a future where the pace of change will be much faster than in the past.

The General Plan must prepare for multiple possible futures and must be flexible and nimble to adapt quickly to unforeseeable changes. Unlike the '64 and the '69 plans, which dealt primarily with physical planning goals, the updated General Plan will be a comprehensive policy document that will provide an overarching planning framework to guide the county's more detailed and specific planning initiatives in the future.

THRIVE MONTGOMERY 2050 APPROACH AND METHODOLOGY

Thrive Montgomery 2050 will produce a comprehensive update of Montgomery County's General Plan, which will guide the county's growth and shape of its physical environment for the next 30 years. It will consider a variety of trends and issues that will impact the county's future and develop a broad set of policies addressing multiple topic areas to help the county be proactive in creating a successful future, even in the face of unanticipated challenges.

Thrive Montgomery 2050 will look at the development that has taken place over the past 50 years and assess how our planning framework has evolved to respond to those challenges. It will explore possible alternatives to position the county to be able to adapt to changing economic, social, environmental and technological conditions, and be able to harness these changes to help the county and its residents to thrive. Rather than detailed, specific land use, zoning or other action items, the updated General Plan will guide future planning efforts through subsequent local area and countywide functional master plans, facility planning and other public and public/private partnership initiatives. These more targeted planning initiatives will provide immediate, in-depth analysis and testing of ideas and recommendations for specific issues.

Montgomery Planning will devote significant staff resources to this project. A core group of 8-10 staff (the Steering Committee) will work with the Director and Deputy Directors to set the scope and direction of the

update, manage the overall approach, communications and outreach programs, and oversee major steps of the plan development process. Expert working groups of five to six staff each will conduct detailed analyses and exploration of possible General Plan policies for the following seven major topic areas: Economy, Equity, Environment, Housing, Transportation, Land Use and Community Design/Arts & Culture. Each member of the Steering Committee will work closely with at least one Working Group to ensure a big-picture cross-fertilization of ideas among all groups and a common understanding of how their work will fit into the overall framework of the update.

Staff will closely coordinate with county and state agencies and regional entities (WSSC, Pepco) to bring their expertise into the plan development process. A Technical Advisory Committee of staff from state and county agencies with expertise in transportation, environment, economic, housing and infrastructure issues will be established, and staff will share relevant information with each expert group and brainstorm on issues and solutions to be included in the plan update process.

STRATEGIC FRAMEWORK OF THRIVE MONTGOMERY 2050

During the pre-planning phase of the project in the past year, staff has worked with a consultant to develop a strategic framework for the plan development process. The consultant work also included developing a comprehensive outreach and communications strategy (page 9).

Strategic Framework

The Strategic Framework was developed by reviewing national and regional examples of other plans and best practices, interviews with other jurisdictions, individual and group interviews with public, institutional and private sector leaders in the county, and a workshop with a panel of local and regional experts. Approved by the Planning Board in January 2019, the strategic framework is an organizing structure and a tool for approaching the Thrive Montgomery 2050 process. It is the first step in informing how we will develop a new General Plan.

The framework consists of three main themes or outcomes for the General Plan Update: economic health, community equity and environmental resilience. The three themes permeate all other issues and areas of concern and, in turn, are impacted by all major changes and trends, such as demographic shifts, economic forces, technological innovations, lifestyle preferences and climate change. These themes will be reviewed and refined with the community's input during the initial outreach phase of the project.

Economic health means that Montgomery County has a forward-looking economy that is strong and competitive, with a variety of stable and well-paying jobs.

Community equity means that Montgomery County is a place where all residents, regardless of race, age, religion, ethnicity, national origin, income, physical ability or gender, have equal access to affordable housing, healthy food options, parks and open spaces, facilities and services, employment opportunities, a quality education and a variety of mobility options.

Environmental resilience means that Montgomery County is prepared to address the threats of climate change and uses the best available strategies to protect both built and natural resources to allow them to be enjoyed by future generations.

Thrive Montgomery 2050 seeks to create a pathway for balancing these three outcomes—a healthy and robust economy should equally benefit all segments of the community while preserving and enhancing the health and resilience of the environment. A negative disruption to any one of these three outcomes will require a response

by the public and private sectors to eliminate or mitigate the threat, implement innovative solutions and restore the desired level of performance for the county's economy, equity and resilience.

Keeping a holistic view of all three is needed to make sure that changes in one area will not create negative consequences for another outcome. For example, an action to improve the county's economy could also cause environmental harms. Montgomery County should look holistically at how we can balance sometimes competing priorities or mitigate negative impacts on one of these outcomes in order to achieve a thriving Montgomery.

Drivers of Change

Montgomery County is a desirable place to live and work due to a strong economy, high-quality education, abundant human capital and a commitment to protecting the environment and equitable growth. Yet chronic issues, such as housing affordability, continue to be a challenge. The future will hold new challenges and drivers of change. A change can be positive or negative and, therefore, is an opportunity to succeed if it is properly managed and harnessed to our advantage. But it can become a threat in the absence of an adequate response.

The following drivers of change were identified during the pre-planning work by the staff and the consultant as part of developing the strategic framework and will be discussed and further refined with the community as part of the General Plan Update development process:

Economic disruptions, such as the impacts of global trade, technological innovations and growing competition among regions and jurisdictions.

Climate change and its potential impacts on the economy, infrastructure, agriculture, health, recreation and natural habitat due to more frequent and severe storms, floods and extreme temperature fluctuations.

Demographic changes, such as international migration, an aging population with more people working longer than the average retirement age in the past, increasing diversity, family size and structure, decreasing birth rates and a changing mix of household types.

Technological innovations, such as Internet of Everything, artificial intelligence, autonomous vehicles, robotic deliveries and many others that are going to influence how we live and work, plan our communities, build and maintain our infrastructure, and develop our economy over the next 30 years.

Changes in lifestyle and locational preferences for walkable communities with easy access to amenities over suburban cul-de-sacs and office parks. The dominance of the traditional nine-to-five job schedule is declining with the growth of telecommuting and flexible work hours, which is creating new dynamics for commercial office space and commuting patterns. The We Company (previously WeWork), which offers physical and virtual shared spaces and office services for individuals and companies, is now ranked as the largest commercial space lessee in the world.

Major Issues

The drivers of change and related emerging trends are creating new issues as well as exacerbating existing ones. The following is a summary of major issues that Thrive Montgomery 2050 should explore to ensure the General Plan Update provides helpful and relevant planning guidance:

Economic Health
Economic competitiveness, changing employment dynamics, role of higher education in economic development, diversifying economic sectors.

Environmental Resilience
Forest and tree canopy protection and expansion, stream water quality and habitat protection, adaption to the impacts of climate change.

Community Equity
Racial, social and economic inequality, unequal distribution of amenities and services, stagnant incomes, increasing poverty and wealth gap, displacement, gaps in educational performance and achievement, discrimination, economic segregation and east-west county divide.

Housing
Housing affordability, including low-income and workforce housing, and provision of a variety of housing types to meet diverse community needs.

Transportation
Multimodal transportation options, congestion, Vision Zero safety issues and impacts of new mobility options.

Technology
Cross-cutting impacts of technology on land use, transportation, employment and other issues.

Infrastructure
Water and sewer capacity, aging infrastructure, resilient utility infrastructure, high speed internet access.

Agricultural Reserve
Future of the Ag Reserve in a changing agricultural context and economy.

Major Corridors
Role of the major corridors in the land use evolution of the county.

Growth Management
Growth management framework in the light of changes in land use and development from greenfields to infill development.

Community Design and Culture
The design of the public realm and its changing role in the community life, arts and cultural resources for a diverse county, compatibility of infill with existing development.

Other Quality of Life Issues
Access to better health care options and healthy food choices, parks and open spaces, community cohesion and community facilities, such as education, recreation, and safety.

Outreach and Communication Strategy

A major element of the General Plan Update effort will be a comprehensive outreach and communication program to gather the input of external (residents, business owners, nonprofit and other organizations, experts and influencers) and insider (county government) audiences. Together, Montgomery Planning and the community will draw on lessons of the past, current experiences and research on trends to propel us forward.

Over the next year, Montgomery Planning will engage the community to imagine what life in Montgomery County will be like in 2050 and what we need to put in place to allow us to thrive in the decades to come. The Thrive Montgomery 2050 Communications Plan (see Appendix II) describes the goals, audiences, process and approach for Thrive Montgomery 2050 outreach and engagement. It also outlines an implementation plan for reaching and motivating audiences to engage and eventually support the plan update. These elements are summarized here.

Goals of Thrive Montgomery 2050 Communications Plan:

Outreach and engagement to the public will be considered successful when community members:

- Provide significant and meaningful input and feedback throughout the process.
- Are interested in and excited about future possibilities and feel motivated to participate in outreach and engagement activities.
- Are historically underrepresented in planning processes but feel motivated to engage.
- Understand that this planning is long-view thinking and the outcomes will come over many decades.
- Feel that they've been heard and see how their input is used.
- Understand why some plan recommendations don't reflect their precise input.
- Support and advocate for the plan.

Outreach and engagement to partner and influential groups will be considered successful when county officials and community-based organizations:
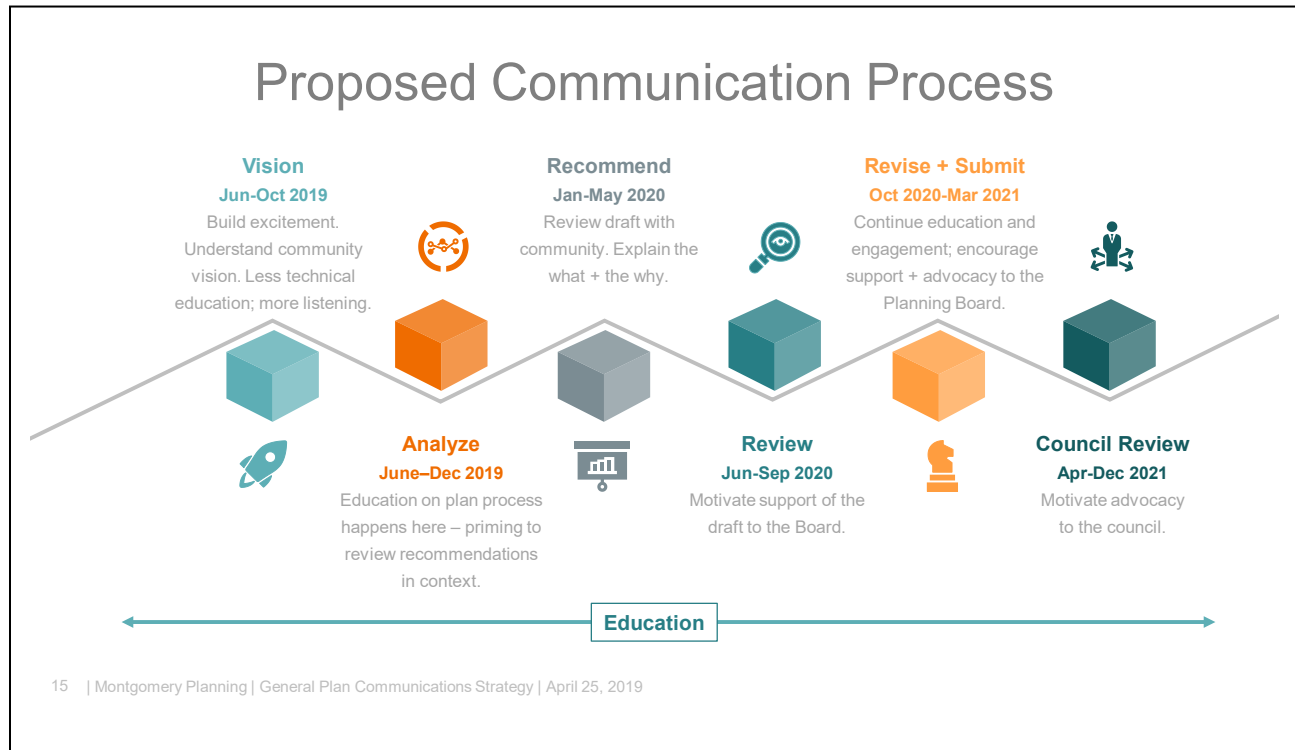
- Provide expertise, insight and feedback throughout the process.
- Help to engage community members.
- Feel good about and support plan recommendations, and specifically embrace the policy recommendations that come from the plan.

Audiences - Primary audiences for Thrive Montgomery 2050 are people who live and own businesses in Montgomery County. Considering the county's changing demographics and the long-term nature of this plan update, Thrive Montgomery 2050 communications will emphasize reaching residents who have been historically underrepresented in planning processes. In Montgomery County, these are, in no particular order:

Renters	Millennial and Gen X families
Latinos	High-school and college students
Foreign born residents	Community-based organizations
African Americans	Small businesses
Millennials	

Other audiences include influential and expert individuals and groups, county officials, the real estate development community and Montgomery Planning staff.

Communications Process - The initial focus of Thrive Montgomery 2050 communications is to motivate excitement about the future, identify the issues facing the county and understand audiences' vision for the future. In Phase 2, we'll concentrate on informing and educating. Phase 3 will focus on deeper consultation with the community about the initial recommendations, and, ultimately, we'll ask the community to advocate for plan approval by the Planning Board and County Council.

Proposed Communication Process

Vision
Jun-Oct 2019
Build excitement. Understand community vision. Less technical education; more listening.

Analyze
June–Dec 2019
Education on plan process happens here – priming to review recommendations in context.

Recommend
Jan-May 2020
Review draft with community. Explain the what + the why.

Review
Jun-Sep 2020
Motivate support of the draft to the Board.

Revise + Submit
Oct 2020-Mar 2021
Continue education and engagement; encourage support + advocacy to the Planning Board.

Council Review
Apr-Dec 2021
Motivate advocacy to the council.

Education

15 | Montgomery Planning | General Plan Communications Strategy | April 25, 2019

Communications Approach

The overall outreach and engagement approach is audience-centric and focused on making Thrive Montgomery 2050 about the community. To do this, for each phase of implementation, we'll:

- Examine the audience's place in the overall Thrive Montgomery 2050 journey.
- Make it easy for people to participate.
- Meet people where they are rather than asking them to come to us.
- Invite a conversation and sharing rather than participation in a process.
- Shine a light on community contributors.
- Show what's at stake and what's possible for the future.
- Frame questions differently and be provocative to pique interest and appeal to values.

This approach is designed to create openings to educate community members about future drivers and potential actions, and to help them understand the significance of the General Plan Update so that they are well-informed and ready to provide feedback when the draft recommendations are ready for review.

To accomplish this goal:
- Outreach will be simple and easy to understand, avoiding planning jargon and technical details.
- Engagement activities will not require prior planning or policy knowledge.
- Strategies and staffing must be tailored to the target audience(s).

- Planners will form and strengthen relationships with community-based organizations and influential individuals to build connection and trust across diverse populations.
- Outreach and engagement will be integrated in the planning process.
- Internal communications will be a priority for consistency and accuracy of messaging and engagement.
- Tools and mechanisms will be developed for evaluation and reporting.

With equity among the three outcomes of Thrive Montgomery 2050, as well as a priority for Montgomery Planning and the county, our communications approach has and will continue to consider equity in all outreach and engagement so that all members of our community have opportunities to shape the future of our county. See the Thrive Montgomery 2050 Communications Plan (Appendix II) for more information.

Implementation and Timing

Many variables will need to be determined once plan recommendations are presented, so implementation planning for communications thus far is focused on outreach and engagement leading to the draft plan. The diagram below depicts the implementation steps that will ensure community excitement, education and engagement to help shape and refine the draft plan update.

Once the contents of the draft plan are known, the communications team and steering committee will consider success with community outreach and engagement to that point, then determine engagement methods for reviewing and soliciting feedback on the plan draft. For details on communication implementation activities and time frames, see the Thrive Montgomery 2050 Communications Plan (Appendix II).

Outreach + Engagement Leading to the Draft Plan
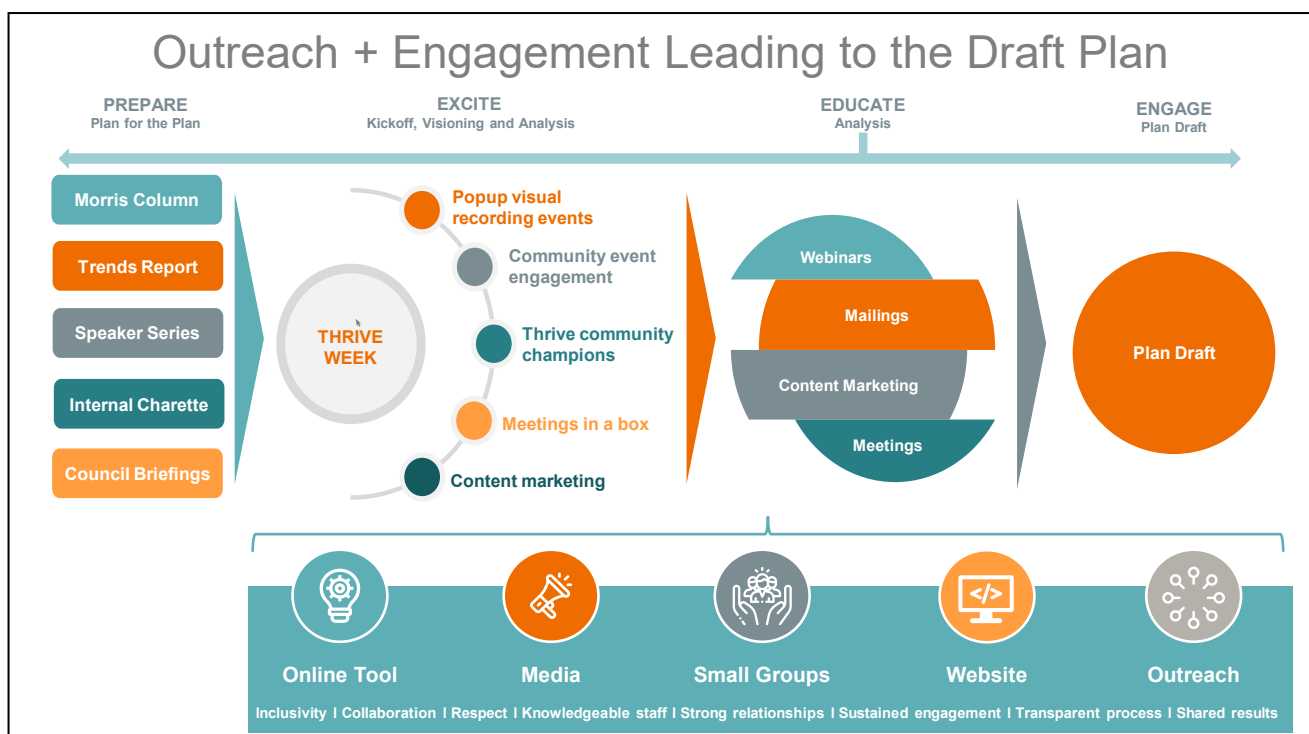
PLAN DEVELOPMENT PROCESS AND TIMELINE

Thrive Montgomery 2050 plan development will take place over a period of 21 months, beginning with a public launch in June 2019 and resulting in a Planning Board Draft of the General Plan that will be submitted to the County Council in March 2021, followed by County Council deliberations. The plan development process will include the following phases and anticipated tasks:

Phase 1: Pre-Plan (July 2018-June 2019)

In July 2018, staff began preparations for the General Plan Update by conducting an initial review of existing conditions. This review included an assessment of where we are today and which major planning initiatives of the past brought us here, an identification of major issues that should be addressed by the General Plan Update and what assets and resources would be needed for this project. A scan of existing literature and best examples from other jurisdictions helped define the challenges and obstacles that should be considered in creating policies for Montgomery County's future.

This phase included the consultant work, which produced the Strategic Framework and Outreach and Communications Strategy described above, and resulted in the development of the project brand, Thrive Montgomery 2050. Additionally, Montgomery Planning has contracted with Fehr and Peers Transportation Consultants to identify alternative futures related to transportation trends and how they will intersect with different issue areas, such as climate change, economy, equity and land use. This work will become the basis for defining the nature and scope of the comprehensive transportation analysis that will be undertaken in Phase 3 of the plan development process. This alternative futures analysis also will inform policy development for other topic areas, such as land use and climate resilience, in later phases.

Phase 1 concludes with the approval of the Scope of Work by the Planning Board.

Major Tasks of Phase 1:

- Compile data and other information on existing conditions.
- Identify key issues and trends.
- Research planning literature and review general plans from other jurisdictions.
- Identify special studies and analyses, tools and resources that will be needed to conduct the plan development process.
- Prepare a conceptual strategic framework and a comprehensive outreach and communications strategy.
- Prepare a Scope of Work for review and approval by the Planning Board.

Phase 2: Visioning (June-October 2019)

A major task of the update development process will be defining a shared vision for the county—where we want to be in 30 years despite drivers of change, and what that shared vision means to all stakeholders in the county. This phase starts with Thrive Week, the official public kick-off of the plan, and implementation of the full outreach program.

Community feedback gathered through in-person events and online tools from this phase will be used to develop a 30-year vision for the county as well as inform the development of draft General Plan policies during subsequent phases. Through outreach and discussions with the community, staff will continue to explore issues and challenges to be addressed by the update.

Major Tasks of Phase 2:

- Implement Thrive Week, official public kick-off of the project.
- Launch Thrive Montgomery branding and project materials using multiple modes, including print, email and social media.
- Conduct in-person and online outreach to gather community input on their ideas about a vision for the county's future and provide information on the plan development process, existing conditions and major issues.
- Develop a vision statement for the General Plan Update.

Phase 3: Analysis (June-December 2019)

This phase will overlap with Phase 2 because staff will start preparing for the analyses work while also conducting extensive community outreach in Phase 2 described above. Staff will conduct in-depth analyses of drivers of changes and major issues affecting the county's future along with an assessment of possible policy options. The results of analyses conducted in this phase will inform the drafting of policy recommendations in the next phase.

Major Tasks of Phase 3:

- Analyze existing and future trends related to drivers of change and major topics, and examine potential policy ideas.
- Continue community outreach to gather feedback and ideas to inform General Plan Update policy development.
- Work with consultants to conduct special studies (listed below) on economic, housing and transportation issues. Staff anticipates the need for the following three studies by outside consultants to inform the work for the General Plan Update.

Special Studies:
- **Economic Study**: Given a growing aging population shifting out of the workforce and robust economies in neighboring jurisdictions, the ability to develop, attract and retain a skilled workforce is critical for the county to remain economically competitive. In other jurisdictions, higher education institutions have played an important role in catalyzing economic growth through employing thousands of employees, educating the future workforce and spurring development activity on or near campuses. The county has strong assets with the Universities at Shady Grove, Montgomery College and proximity to the University of Maryland, which will become more connected to the county after the opening of the Purple Line. This study will look at the role of higher education in the county and how we can better leverage the existing assets of these major institutions and build linkages with new ones to enhance our economy.

- **Housing Needs Assessment**: Recent legislation passed by the State of Maryland requires a housing needs assessment as part of a comprehensive/general plan. The forecasts for the housing needs analysis should include separate forecasts of household growth by household income (as a percent of area median income) and household size. These forecasts are based on an assessment of demographic trends and regional job growth. The analysis of current and future housing needs should serve as a base for the county's housing goals in the General Plan's Housing Element.

- **Future Transportation Trends and Impacts Analysis:** A comprehensive transportation analysis for the General Plan Update will explore the county's transportation network as it is today, how it interacts with regional networks and how it will serve us for the next 30 years. This study will also

look at how we should prepare for the impacts of future growth in the context of new technologies, such as ride-sharing, autonomous vehicles, and e-scooters, as well as other economic, demographic and environmental drivers of change and trends.

Phase 4: Draft Plan Development (January-September 2020)

This phase will include two major tasks:

- Between January and May 2020, data and findings from the Phase 3 analyses of drivers of change and major topics will be prepared and released to the public. This deliverable is primarily informational and for educational purposes; draft General Plan Update policies will be released for community feedback in the subsequent phase. Montgomery Planning will conduct additional outreach to share and discuss these findings with community members. This public engagement effort will further community education on these issues, prepare them for consideration of draft General Plan Update policies at a later phase and determine if there are additional issues that should be addressed. Community feedback from this outreach will inform the development of draft General Plan Update policies.
- Throughout this phase, staff will begin drafting policies to address the findings from the Phase 3 analyses and data trends. This effort will incorporate planning policy best practices as well as high level policy direction advanced through recently completed master, sector and functional plans. Staff will incorporate community feedback during this phase and prepare the first draft report of the General Plan Update, called the Working Draft.

Major Tasks of Phase 4:

- Share with the community the findings of the analyses and special studies conducted in Phase 3.
- Conduct additional public outreach to help shape policies.
- Based on the findings of the analyses and special studies conducted in Phase 3 and additional community input, develop draft General Plan Update policies and prepare the Working Draft of the Plan.

Phase 5: Planning Board Review and Transmittal (October 2020-March 2021)

Staff will present the Working Draft plan to the Planning Board for its review and approval. The draft will be published as the Public Hearing Draft, and the Board will hold a public hearing to receive comments from all stakeholders. Montgomery Planning and the County Council staff will explore the feasibility of holding a joint Planning Board/County Council hearing instead of holding a second public hearing by the County Council as described in Phase 6 below.

The public hearing will be followed by Planning Board work sessions where the Board will discuss the issues and comments raised during the testimony and make changes to the Public Hearing Draft. Staff will revise the Public Hearing Draft based on the Board's guidance and prepare the Planning Board Draft for the Board's approval. The approved Planning Board Draft will then be transmitted to the County Executive and the County Council.

Major Tasks of Phase 5:

- Present Working Draft to the Planning Board for review and approval as the Public Hearing Draft and set a public hearing date.
- Conduct Planning Board public hearing.
- Conduct work sessions with the Planning Board to review the public hearing testimony.

- Revise the draft plan based on the Planning Board's guidance.
- Prepare the Planning Board Draft and present it to the Board for approval.
- Transmit the Planning Board Draft to the County Executive and the County Council

Phase 6: Council Review and Approval of the General Plan Update (beginning April 2021)

After receiving the Planning Board Draft, the County Executive has 60 days to review the draft and prepare an assessment of fiscal impacts of implementing the draft General Plan policies and send it to the County Council. The County Council, in the meantime, will set a date for the public hearing to be held after the County Executive's 60-day comment period.

After receiving testimony at the public hearing, the Council's Planning, Housing and Economic Development (PHED) Committee will hold work sessions and forward its recommended changes to the full Council, which will hold full Council work sessions and approve a revised plan. The approved General Plan Update will then be adopted by the Planning Board and the Maryland-National Capital Park and Planning Commission as the updated plan and become the new 2050 General Plan for the county.

Major Tasks of Phase 6:

- Prepare for and attend County Council public hearing on the Planning Board Draft.
- Work with the County Council staff during the PHED Committee and County Council work sessions.
- After County Council approval, prepare the approved General Plan for adoption by the Planning Board and the Maryland-National Capital Park and Planning Commission.

Appendix 1: List of Resources

All Montgomery County master plans, sector plans and functional master plans can be accessed at this link: https://montgomeryplanning.org/planning/master-plan-list/

On Wedges and Corridors, A General Plan for the Maryland-Washington Regional District in Montgomery and Prince George's Counties, 1964
http://www.montgomeryplanning.org/community/general_plans/wedges_corridors/wedges_corridors64.shtm

Updated General Plan for the Maryland-Washington Regional District in Montgomery County Maryland, 1969
https://montgomeryplanning.org/wp-content/uploads/2017/10/1969UpdatedGeneralPlanocr.pdf

General Plan Refinement of the Goals and Objectives for Montgomery County, 1993
https://montgomeryplanning.org/wp-content/uploads/2017/10/GeneralPlanRefinement1993ocr.pdf

Montgomery County Trends--A Look at People, Housing and Jobs Since 1990, 2019
https://montgomeryplanning.org/wp-content/uploads/2019/01/MP_TrendsReport_final.pdf

Missing Middle Housing Study, 2018
https://montgomeryplanning.org/wp-content/uploads/2018/09/MissingMiddleHousingStudy_9-2018.pdf

Meeting the Housing Needs of Older Adults in Montgomery County, 2018
https://montgomeryplanning.org/wp-content/uploads/2018/06/Meeting-the-Housing-Needs-of-Older-Adults-in-Montgomery-County-Final5-24-18.pdf

Montgomery County 2018-2027 Comprehensive Water Supply and Sewerage Systems Plan, 2018
https://www.montgomerycountymd.gov/water/supply/county-water-plan.html#waterplan

Racial Equity in Government Decision-Making: Lessons from the Field, 2018
https://www.montgomerycountymd.gov/OLO/Resources/Files/2018%20Reports/OLOReport2018_8.pdf

Emergency Climate Mobilization, County Council Resolution No. 18-974, 2017
https://www.montgomerycountymd.gov/COUNCIL/Resources/Files/res/2017/20171205_18-974.pdf

Montgomery County Rental Housing Study, 2017
https://montgomeryplanning.org/wp-content/uploads/2017/07/RHS_Strategy-Document.pdf

Montgomery County Retail Strategy, 2017
https://montgomeryplanning.org/wp-content/uploads/2017/10/Retail_Trends_Study_Final10.12.17.pdf

Office Market Assessment Montgomery County, Maryland, 2015
https://www.montgomeryplanning.org/research/documents/MontgomeryCountyOfficeFinalReport061815.pdf

Montgomery County, Maryland Climate Protection Plan, 2009
https://www.montgomerycountymd.gov/DEP/Resources/Files/downloads/outreach/sustainability/2009-moco-climate-protection-plan.pdf

Final Report of the Ad Hoc Agricultural Policy Working Group, 2007
https://www.montgomerycountymd.gov/COUNCIL/Resources/Files/doc/aggroup_finalreport.pdf

Thrive Montgomery 2050 Communications Plan

Montgomery Planning - May 17, 2019

The Thrive Montgomery 2050 General Plan Update must reflect the community's values and priorities, and represent a shared vision of the county. A major element of the General Plan Update effort will be a comprehensive outreach and communication program to gather input of external (residents, business owners, nonprofit and other organizations, experts and influencers) and insider (county government).

Together, Montgomery Planning and the community will draw on lessons of the past, current experiences and research on trends to propel us forward. Over the next year, Montgomery Planning will engage the community to imagine what life in Montgomery County will be like in 2050 and what we need to put in place to allow us to thrive in the decades to come.

This communications plan describes the goals, audiences, process and approach for Thrive Montgomery 2050 outreach and engagement. It also outlines an implementation plan for reaching and motivating audiences to engage and eventually support the plan update.

Thrive Montgomery 2050 Communications Plan
Montgomery Planning - May 17, 2019

I. Goals
Outreach and engagement efforts support the overarching goals of the General Plan Update: Thrive Montgomery 2050 General Plan Update represents a shared vision of the community, its values and priorities, and prepares the county to thrive in face of future challenges. Communications is one piece of realizing these goals and is a supportive function that relies on strategic and programmatic goals being met.

While Appendix B contains phase-specific communication goals, overview goals for outreach and engagement are outlined below.

1. Outreach and engagement to the public will be considered successful when community members:
    a. Provide significant and meaningful input and feedback throughout the process.
    b. Are interested in and excited about future possibilities and feel motivated to participate in outreach and engagement activities.
    c. Are historically underrepresented in planning processes and feel motivated to engage.
    d. Understand that this planning is long-view thinking and the outcomes will come over many decades.
    e. Feel that they've been heard and see how their input is used.
    f. Understand why some plan recommendations don't reflect their precise input.
    g. Support and advocate for the plan.

2. Outreach and engagement to partner and influential groups will be considered successful when county officials and community-based organizations:

    a. Provide expertise, insight and feedback throughout the process.
    b. Help to engage community members.
    c. Feel good about and support plan recommendations, and specifically embrace the policy recommendations that come from the plan.
        i.   Advocate for the recommended plan to the Planning Board and County Council (community-based organizations only).
        ii. Approve the recommended plan (County Council only).

3. Communications with Montgomery Planning staff will be considered successful when internal audiences:
    a. Understand the vision for the plan and their individual roles.
    b. Confidently communicate about the General Plan while using audience-focused talking points, approved materials and communications best practices.
    c. Embrace the concept that everyone is responsible for outreach and engagement.

II. Audiences
Primary audiences for Thrive Montgomery 2050 are people who live and own businesses in Montgomery County. Considering the county's changing demographics and the long-term nature of

this plan update, Thrive Montgomery 2050 communications will emphasize reaching residents who have been historically underrepresented in planning processes. In Montgomery County, these are, in no particular order:

- Renters
- Latinos
- Foreign-born residents
- African Americans
- Millennials

- Millennial and Gen X families
- High-school and college students
- Community-based organizations
- Small businesses

Other audiences include

- Influential and expert individuals and groups
- County officials: Elected and non-elected

- Real estate development community
- Montgomery County agency staff

Specific information about target audiences, what we know about them, where to reach them and how best to engage with them is contained in Appendix C.

Practical Considerations

When communicating with external audiences, it is important to remember that we are not the target audience. Communication strategies and implementation steps must be based on the reality of external audiences and consider audience-centric values, goals and challenges.

For the General Plan Update, this engagement will require an approach that makes all outreach about our audiences, not about us. The communications strategy and implementation presentation outlines this approach, which also considers:

- When communicating with diverse groups, we need to be mindful that others don't have the same context or level of knowledge that we do. Their reality and experience differ from ours. And we should approach communications from a place that assumes that these groups are unaware of and likely don't care about what we're doing. So we must position communications in a way that makes the General Plan Update relevant to their realities.
- Most external audiences do not understand planning and the planning process.
- Other planning processes are happening - both within Montgomery Planning, such as the Subdivision Staging Policy and Vision Zero, and in county government - so our communications aims to avoid overlap and dovetails to efficiently leverage similar efforts where possible.
- We are competing for limited time and attention with multiple audience realities and priorities.
- We must translate - both for non-English speakers and planner-ese - and interpret. Interpretation is not limited to language, but must also consider cultural norms about interaction with government, gender roles, speaking out in public, etc.

III. Communications Process

The initial focus of Thrive Montgomery 2050 communications is to motivate excitement about the future, identify the issues facing the county and understand audiences' vision for the future. Then, in phase 2, we'll concentrate on informing and educating. Phase 3 will focus on deeper consultation with

the community about the initial recommendations and, ultimately, we'll ask the community to advocate for plan approval by the Planning Board and County Council.

While the communication process (Figure 1) is broken into pieces, the outreach and engagement resources and activities are designed to accommodate the non-linear way that people will come into the process.

Ongoing Education

Different types of engagement are needed at different points in the planning process; so education should continue throughout all phases of the General Plan Update development process. Each phase of education and communications implementation should build on and inform the other, with education being a vital component of each phase of engagement. The nature of the education will be determined by the needs of the phase and the awareness and interest by the community.
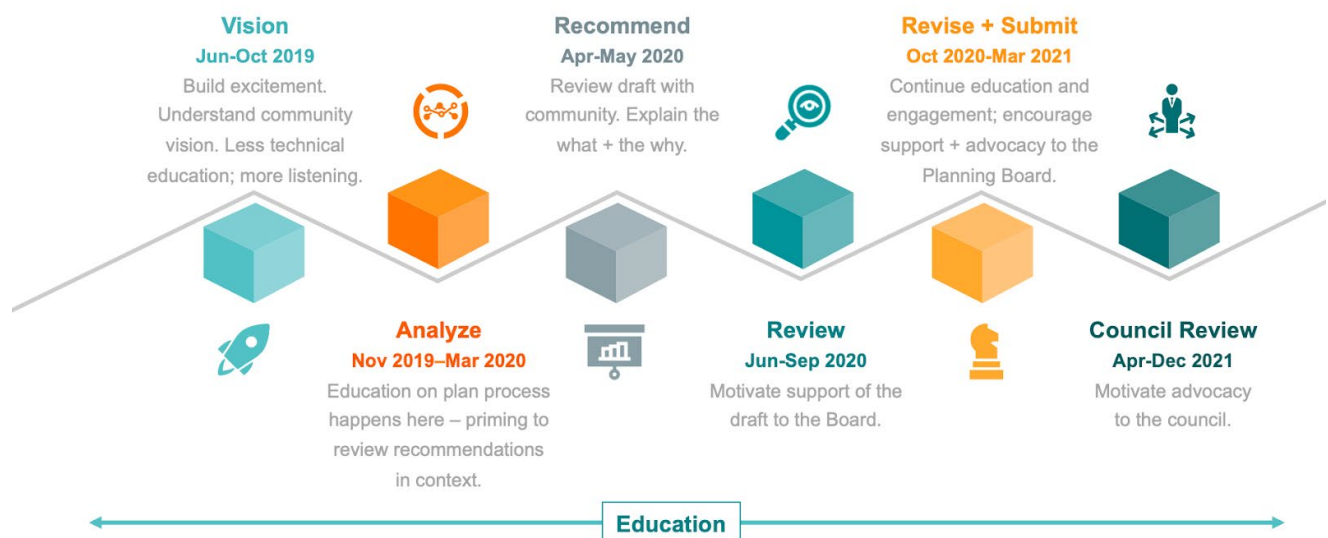
Proposed Communication Process

Vision
Jun-Oct 2019
Build excitement. Understand community vision. Less technical education; more listening.

Analyze
Nov 2019–Mar 2020
Education on plan process happens here – priming to review recommendations in context.

Recommend
Apr-May 2020
Review draft with community. Explain the what + the why.

Review
Jun-Sep 2020
Motivate support of the draft to the Board.

Revise + Submit
Oct 2020-Mar 2021
Continue education and engagement; encourage support + advocacy to the Planning Board.

Council Review
Apr-Dec 2021
Motivate advocacy to the council.

Education

Figure 1: Communication Process

Visioning/Excite

Rather than leading with who Montgomery Planning is, what the General Plan Update is and what the process looks like, we'll start by inviting community members to vision, predict, speculate and futurescape with us in a way that is relevant to them and those they care about. By using provocative statements and interesting questions, we'll pique the community's interest in the future and give them reasons to care about visioning for the county's future. And we'll offer Thrive Montgomery 2050 as a way to help them chart the course to their future, while they share with us valuable insight into what they care about, need, desire, hope for, are frustrated about and imagine for Montgomery County in 2050. The communications purpose of this phase is to pique interest, engender curiosity and build enthusiasm for the "asks" to come in subsequent phases.

Analysis/Educate
Visioning happens concurrent with the analysis work done by planners and feeds into this process. Toward the end of that analysis period, we will shift our outreach focus to education that will prepare community members to provide meaningful feedback on draft plan recommendations. Before audiences will invest their valuable energy and time in reviewing draft recommendations and providing feedback, they need to understand what the General Plan Update is and why they should care about it. While education will happen throughout the plan development process, this phase aims to leverage the interest and excitement built during the visioning phase to help "make the case" for the utility of the General Plan Update and each participant's engagement and involvement in the General Plan Update process.

Recommend + Review/Engage
These phases focus on reviewing the draft plan and recommendations with the community. First, we explain the what and the why of these recommendations, then we engage community members in conversations about the draft plan. Specific methods for this engagement will be determined largely based on the plan recommendations.

This engagement must also include showing the community how their input was used to develop the draft plan and address community concerns, so planners will develop a system for tracking, incorporating and explaining how community input is used.

Revise + Submit / Endorse
While planners incorporate community feedback to revise the plan, communications will focus on motivating and equipping community members to advocate for Thrive Montgomery 2050 drafts to the Planning Board and, ultimately, to the County Council.

IV. Communications Approach
The overall outreach and engagement approach is audience-centric and focused on making Thrive Montgomery 2050 about the community. To do this, for each phase of implementation, we'll:
- Examine the audience's place in the overall Thrive Montgomery 2050 journey.
- Make it easy for people to participate.
- Meet people where they are rather than asking them to come to us.
- Invite a conversation and sharing rather than participation in a process.
- Shine a light on community contributors.
- Show what's at stake and what's possible for the future.
- Frame questions differently and be provocative to pique interest and appeal to values. By using thought-provoking statements and questions and interesting engagement activities, we'll get community members thinking differently about the future.

This approach is designed to create openings to educate community members about future drivers and potential actions, and to help them understand the significance of the General Plan Update so that they are well-informed and ready to provide feedback when the draft recommendations are ready for review.

To accomplish this approach:
- Outreach will be simple and easy to understand, avoiding planning jargon and technical details.
- Engagement activities will not require prior planning or policy knowledge.
- Strategies and staffing will be tailored to the target audience(s).
- Planners will form and strengthen relationships with community-based organizations and influential individuals to build connections and trust across diverse populations.
- Outreach and engagement will be integrated in the planning process.
- Internal communications will be a priority for consistency and accuracy of messaging and engagement.
- Tools and mechanisms will be developed for evaluation and reporting.

Equitable Outreach + Engagement

With equity among the three outcomes of Thrive Montgomery 2050, as well as a priority for Montgomery Planning and the county, our communications approach provides an opportunity to model how close we want to be in relationship with one another in our county community. As such, communications planning and implementation has and will continue to consider equity in all outreach and engagement so that all members of our community have opportunities to shape the future of our county.

For historically underrepresented audiences, outreach will focus on leveraging community influencers who have established authority and trust with their communities. It is recommended to partner with these organizations by co-hosting listening sessions and events, providing content for their events and communications, and engaging their staff with tools like meetings in a box and talking points. The General Plan Update Steering Committee is tasked with strengthening and building relationships with these organizations as soon as possible.

In addition, communications need to consider:

1. Literacy level - Communications will provide background for complex concepts, use images and graphics, and avoid acronyms. Additionally, staff should be available for verbal explanations and surveying as alternatives to written materials and questionnaires.

2. Socioeconomic status - Event locations and timing will consider convenience for the given community as well as accessibility to public transportation, childcare and food.

3. Language - Thrive Montgomery 2050 messaging, materials and other communication will be translated from English into the major languages spoken in Montgomery County where limited English proficiency is greater than 10 percent (see Figure 2). Written translations and verbal interpretation will be provided based on the prevalence of languages spoken in a given geographic area and considering areas where there are large numbers of people with low-English proficiency.

4. Culture - Language translation is just one part of effectively communicating with Montgomery County's multicultural population. Communication will also need to consider cultural norms, such as previous experience with public participation and democratic processes, comfort sharing ideas in public and community methods for decision-making.

5. Physical and mental ability - All communications and access to events and services will follow the guidelines of the Americans with Disabilities Act (ADA) and comply with ADA regulations.
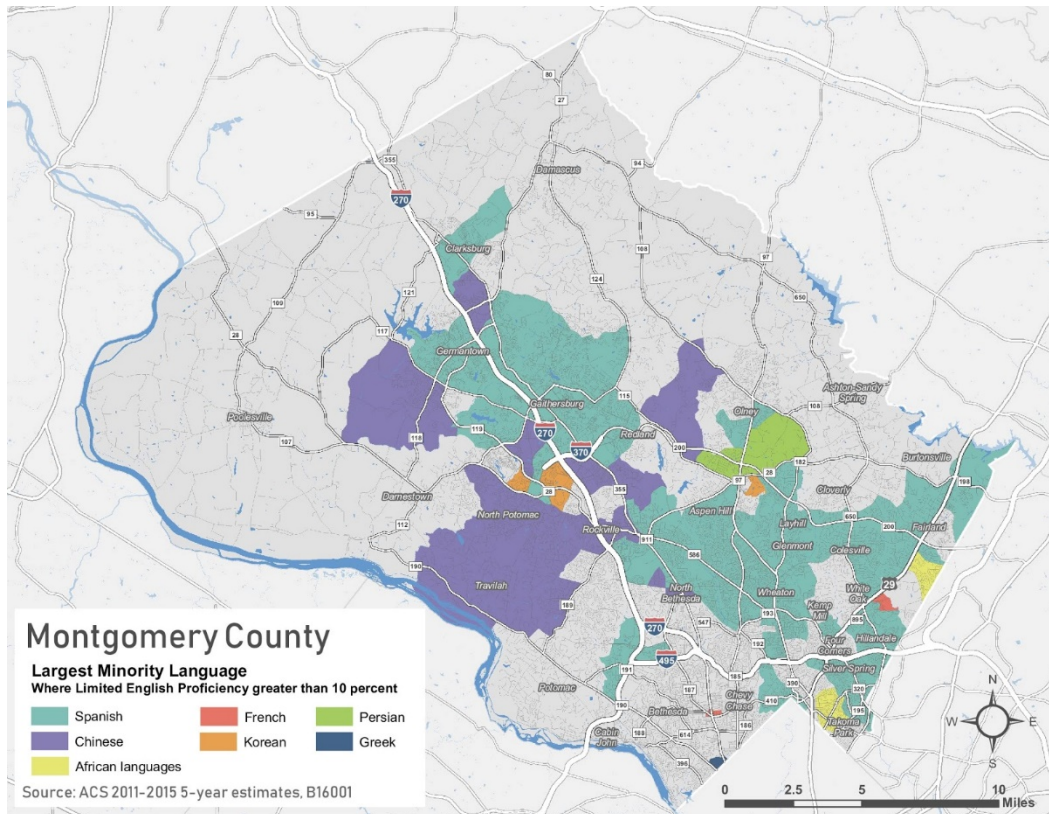
Figure 2: Montgomery County Largest Minority Language Where Limited English Proficiency is Greater than 10 percent

Staffing

Realizing this overall communications approach and the implementation steps to follow will require a tremendous amount of staff effort. The Thrive Montgomery 2050 Steering Committee is forming working groups and staffing plans to meet these needs. Communications will support these efforts by resourcing staff with messaging, materials, media and outreach training and other implementation support.

Development, coordination of messaging, materials, web and other online tools, social media outreach, print, transit and digital advertising, media relations and other tactical communications will be led by Montgomery Planning's communications team with the support of a marketing agency and communications consultants as needed.

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V. Creative + Messaging

The tone of creative and messaging for Thrive Montgomery 2050 will be inclusive, collaborative, hopeful and provocative.

The Thrive Montgomery 2050 logo (Figure 3) blends bold typography with a logo mark that expresses the three desired outcomes from the Strategic Framework: Environmental Resilience, Economic Health and Community Equity (Figure 4). The tagline "Let's plan our future. Together." (Figure 3) is a simple invitation that plainly explains what Thrive Montgomery 2050 is about, while emphasizing that it is a collaborative and community-wide initiative.

Figure 3: Thrive Montgomery 2050 Logo + Tagline

Figure 4: Thrive Montgomery 2050 Logo Graphic Components

Figure 5: Thrive Translations in Chinese, Spanish, Korean, French, Farsi, Vietnamese

Initial messaging will emphasize Thrive Montgomery 2050 not as a government planning process but instead as an interesting and thought-provoking initiative that encourages community visioning and conversation about the county's future. It also invites personal reflection about individuals' wants and needs for the future and that of their families. Sample ad concept copy is shown in Figure 6.

Provoke the Future Campaign Concept

WHAT IF THERE WAS NO SUCH THING AS RUSH HOUR?

50 years ago, working remotely wasn't a thing. In 2050, maybe office buildings won't even exist.

Just because we can't imagine it now, doesn't mean it's not coming. We can't stop it. But we can plan for it.

Join us at EVENT NAME to plan for how the changing nature of work may change our county.

Thrive Montgomery 2050
Let's plan for our future. Together.

WHAT IF EVERYONE HAD AN AFFORDABLE PLACE TO LIVE?

Since 2000, housing costs in Montgomery County have increased 25%. By 2050, you could be paying 50% more to live where you live now.

If we want a different future, we need to think differently. Let's plan for a future in which Montgomery County and all of its people continue to thrive.

Go to thrive.mc/input to share your ideas for more accessible and affordable housing in the decades to come.

Thrive Montgomery 2050
Let's plan for our future. Together.

Figure 6: Thrive Montgomery 2050 Sample Ad Concept Copy

Messaging for the Visioning/Excite phase should be about the people, their values and their vision; not the history of the plan and the role and value of Montgomery Planning. Subsequent phases will allow for more explanation of the General Plan process, Montgomery County's role, etc., but these should still be explained in an audience-focused way that is free of planning and government jargon.

VI. Implementation and Timing

Many variables will need to be determined once plan recommendations are presented, so implementation planning for communications thus far is focused on outreach and engagement leading to the draft plan. The diagram (Figure 7) and text below depict the implementation steps that will ensure community excitement, education and engagement to help shape and refine the draft plan update.

Once the contents of the draft plan are known, the communications team and steering committee will consider success with and learnings from community outreach and engagement to that point, then determine engagement methods for reviewing and soliciting feedback on the plan draft.

Figure 7: Implementation Leading to the Draft Plan

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Implementation mindset

Implementation must be guided by strategy. To remind ourselves of what is needed to fulfill the strategic approach to Thrive Montgomery 2050 communications, it's important to keep the following tactical pieces of outreach and engagement at the forefront:

- Inclusivity
- Collaboration
- Respect
- Knowledgeable staff
- Strong relationships
- Sustained engagement
- Transparent process
- Shared results

Given the nature of this work, the approach to these implementation plans must be integrated, not siloed. Each phase will inform and build on the other, and incorporate lessons learned.

Communication Implementation Activities and Timeline

Underlying Tools

Underlying all communication activities are the tools and constants to support each implementation step. These are foundational, but will also evolve as the Thrive Montgomery 2050 effort does, allowing us to educate throughout, welcome people into the process whenever they have interest and time, and adjust our messaging and resources to meet the needs of our audience. Possible tools are:

- Website - the main information source and engagement resource for Thrive Montgomery 2050.
- Ad campaigns
  - Digital (useful for specific and time-sensitive calls to action) targeting millennials, Gen Xers, African American, foreign-born and ag reserve audiences. May also target small businesses.
  - Print (calls to action depend on publication and frequency) targeting Latino and foreign-born county audiences.
  - Radio (useful for specific and time-sensitive call to actions) targeting Latino and African American audiences
  - Transit (calls to action must be evergreen due to length of impressions) targeting African American, Latino and millennial audiences.
- Postcards / posters / flyers targeting Latino (in Spanish at transit locations), parents (send through Montgomery County Public Schools), small businesses and all other (at events) audiences.
- Ongoing Thrive Montgomery 2050 email series featuring stories from people, blog articles about the future, vlogs and energetic calls to action.
- Social media outreach and engagement, including hashtags, photo contests, polls, memes and quotes from the community to provoke and pique interest. Social content can also be leveraged as helpful conversation starters at events. And social media can be used to show the impact of the 1964 General Plan once we get deep into education mode.
- Media relations - radio, TV, print and digital - includes ethnic media.

- Community relations targeting civic associations, homeowner associations, parent-teacher associations (PTAs), apartment management, business groups, office building management, etc.
- Direct mail - may include inserts in Montgomery County Public Schools materials for parents, electric bill inserts for homeowners and renters and other efficient opportunities to reach various audiences.

Implementation steps and related activities

These are outlined below. More detail about audiences, specific activities, planning steps, timing and resources is part of a detailed Thrive Montgomery 2050 Communications Implementation plan which is available upon request.

1. **Prepare** - While the official public kickoff of Thrive Montgomery is planned for June 2019, Montgomery Planning has been "planning for the plan" for more than a year. These efforts focused on developing a strategic framework for the General Plan Update, seeking staff input (Morris column posting of ideas and steering committee work), conducting foundational research (Montgomery County Trends Report) and learning from other jurisdictions and experts (2019 Winter Speaker Series).

    The preparation continues through June 2019 as Montgomery Planning works on:

    a.   Energizing and exciting Montgomery Planning staff for their upcoming work on the General Plan Update. Since all staff will be involved in developing the General Plan Update, it is vitally important that all staff understand and are equipped to serve as Thrive ambassadors and that the Department develops a project culture of Thrive that permeates through and radiates from all aspects of General Plan Update work. To develop this culture, staff must be well prepared and equipped to embrace their roles in communications outreach and engagement. Recommended internal communications activities are:
    - Internal communications kickoff, including invitation to Thrive; clear definition of roles and responsibilities.
    - Implementation charrette aimed at getting staff working from different disciplines working on subjects outside of their everyday work.
    - Media and message training.
    - Communications toolkit (messaging, graphics, materials, etc.).
    - Weekly internal briefings (email; vlog; all-hands meetings).
    - Internal portal for General Plan Update info (calendar of events; staffing; etc.).

    b.   Strengthening and forming vital partnerships with county officials (both elected and non-elected) and community-based organizations through briefing conversations. We anticipate these leadership and steering committee-led discussions marking the beginning of strong partnerships with these groups as we work collaboratively to plan for the future of Montgomery County and invite the broader community to work with us, together.

2. **Excite** - The fruits of preparatory activities will converge with a series of public kickoff events called THRIVE WEEK. One event will be held in each of the five County Council districts from June 26 through 30, 2019 (five events on five days) to introduce Thrive Montgomery 2050 to the community and ask them to begin envisioning the future of our county. Events will feature meet-and-greets with councilmembers, multilingual graphic recording artist activities, food, fun and video interviews of attendees about their vision for the future.

   From July through October 2019, diverse audiences will be engaged through a variety of activities to allow different levels and types of involvement in the process. During the visioning phase, these activities will invite community members to provide insight and input in quick and convenient ways without needing background on planning or extensive education on future drivers and possibilities. Participants will share information in ways that build and maintain community relationships and trust, e.g., by using culturally appropriate communication methods and tactics and a variety of ways to engage.

   Visioning communication tactics and activities are:
   a.   Online tool - A quiz-like online tool to gather information and gauge reactions to and sentiment toward provocative questions about Montgomery County's future. Questions will be weighted to lead participants to Thrive Montgomery 2050 information that is most relevant to their interests and concerns. This tool is designed to gather information to understand community preferences and concerns, and to spark interest and motivate engagement. It is also an opportunity to build the Thrive Montgomery 2050 email list and better understand language preferences.

   The tool will be available 24/7 online and at events via iPads, paper copies and interviews. As the project evolves, the questions can be updated so that the tool evolves with the engagement needs of a given phase.

   b.   Pop-up visual recording events - This high-visibility activity will produce graphic representations of community members' vision for the county's future. We'll schedule 5-7 sessions throughout the summer in locations where people already gather. The focus question(s) for graphic recording interviews may vary depending on the location and interests of the population in a given area.

   c.   Community event engagement - This tactic focuses on meeting people where they are. We'll host a variety of pop-up events tailored to different areas of the county where people already gather or have a presence at community-wide public events. For example, community health centers, street fairs, cultural events, public events at religious or community centers, etc. At these events, we'll have iPads for completing the online visioning tool, reuse activities and materials from Thrive Week and continue to gather info through Montgomery County Future Headlines social media activity, etc. When possible, we'll offer food, activities for children, informational handouts and Thrive Montgomery 2050 branded giveaways.

   Depending on the audience, pop-up event locations may include regional service centers,

community centers, religious institutions, Metro stations, farmers markets, malls, etc. Community event tabling examples include Montgomery County Agricultural Fair, Latin Heritage Fiesta, Taste of Montgomery, Salvadoran American Festival, Parks Half Marathon, Damascus Harvest Festival and Business Fair and The Bethesda Row Arts Festival.

Based on the setting, Montgomery Planning may provide incentives or giveaways for participation, food and/or kid-friendly activities at events.

d.   Subject area engagement meetings with community-based organization, special interest groups and subject matter experts - Planners will engage these groups/individuals on specific topics as needed during the analysis and plan development process.

Montgomery Planning leadership has indicated that it wants planners who are responsible for certain plan subjects/elements to have flexibility in their approach to gathering the information and feedback needed from these groups, so no recommended approach is provided here.

e.   Thrive community champions - We'll work to provide influential groups like community-based organizations, special interest groups and business leaders with multiple opportunities to champion Thrive Montgomery 2050. These groups and individuals must include a representative mix of community members by type (resident, business owner, nonprofit leaders, community representative, etc.) and demographics. Thrive Community Champions will be invited to engage in regular discussions about the plan throughout the process and we'll seek input at key decision points while testing ideas with them, as appropriate. These groups may also provide tremendous insight on community preferences and specific engagement practices that work best with their community members/constituents. Thrive Community Champions will also receive regular email updates and webinar briefings, and we'll supply positive content to share on social and through their own communication channels.

f.   Meetings in a box - To encourage community-led engagement, planners will work with communications to develop a meeting-in-a-box type toolkit for groups, organizations and businesses to facilitate their own discussions about how Montgomery County can continue to thrive, plus provide visioning feedback to Montgomery Planning.

g.   Content marketing - Content will be developed and leveraged across multiple channels.

- Video: Use a series of videos to introduce Thrive Montgomery 2050 and share stories of community leaders (elected and non-elected), residents and business owners about their vision for a thriving Montgomery County. These videos will help community members see themselves in the process and think beyond the next 5-10 years. They will also communicate community values in the words (and via the faces) of the community, not a government agency telling them what and who they are.

- Blog and vlog: To get involvement from and perspectives of different people in the community -- residents, community leaders, business leaders, county officials -- we'll ask different people to be involved in writing or being interviewed for Thrive Montgomery stories to share on the blog.
- This mechanism allows for gathering and producing content to resonate with the community. The stories and reflections shared are a form of visioning feedback and will help people understand the perspectives of others and hopefully make them more open to consider those perspectives when weighing plan recommendations. They also allow for interspersing planning and government expert perspectives with broader community perspectives. Finally, this method invites community leaders, business, influencers and the development community to share their visions -- and leverages the reach of their networks for promotion.

3. **Educate** - With community members already aware of Thrive Montgomery and envisioning the future of Montgomery County, we'll shift our focus from October 2019 through March 2020 to education. During this period, planners will complete the analysis phase, incorporate the community's visioning insights and ready draft plan recommendations for public feedback.

4. Simultaneously, communication will focus on educating community members on the importance and impact of the General Plan Update; the process for developing, revising and approving the plan; and the role of Montgomery Planning and others in finalizing and implementing the plan. We'll do so using webinars, mailings, content marketing and community meetings.

4. **Engage** - From April - September 2020, the communications team will support planners as they review the draft plan recommendations with the community, focusing on helping community members understand what is being recommended and why. Engagement methods are highly dependent on plan content and recommendations and community engagement to that point. Leadership, planners and communicators will work together to assess these factors and develop and implement the most effective outreach and engagement methods for the plan content and recommendations, as well as community receptivity.

VIII. APPENDICES
Appendix A: Communications Strategy Presented to the Planning Board
Appendix B: Audience Desired Outcomes
Appendix C: Audience Backgrounder

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Appendix A: [Communications Strategy Presented to the Planning Board](#) on April 25, 2019

Appendix B: Audience Desired Outcomes

Desired Outcomes: External Audiences

Visioning Phase EXCITE	Analysis Phase EDUCATE	Feedback Phases ENGAGE	Submission Periods ENDORSE
• Feel excitement and energy around the future + how they can shape it • Provide input on what they like about + the biggest issues facing Montgomery County • Begin to understand the impact of long-term planning on community • Under-represented audiences: Feel invited + included; feel that comm + feedback methods are accessible	• Have info needed to meaningfully participate in plan draft feedback • Recognize Montgomery Planning's role in county • Understand the complexity + conflicting demands of future planning for this large, diverse county • Community leaders: Provide input + analysis on goal +subject areas • Under-represented audiences: Feel invited + included; feel that comm + feedback methods are accessible	• Support the General Plan's recommendations and policies • Feel some ownership of the plan – understand and are invested in the vision • Actively communicate their support to the Planning Board and the County Council during public hearings • Under-represented audiences: Feel invited + included; feel that comm + feedback methods are accessible	• Support + advocate for the Plan • Form new groups to support the main goals of the plan if there is strong opposition to certain parts of the plan

Desired Outcomes: County Audience

Visioning Phase EXCITE	Analysis Phase EDUCATE	Feedback Phases ENGAGE	Submission Periods ENDORSE
• Feel included in and invested in the General Plan project and process • Provide feedback and help you prioritize policy proposals to address issues and preserve or enhance the great things about the county • Participate in events and show enthusiasm and support for Thrive Montgomery 2050 • Ask constituents to participate and provide their input • Coordinate with Montgomery Planning and work from core set of	• Feel included in and invested in the General Plan project and process • Provide feedback and help you prioritize policy proposals to address issues and preserve or enhance the great things about the county • Encourage constituents to understand the role of the General Plan and its importance and impact • Coordinate with Montgomery Planning and work from core set of messages	• Feel that their early input is reflected in the draft General Plan and understand when recommendations don't reflect their input • Participate in events and show enthusiasm and support for Thrive Montgomery 2050 • Ask constituents to provide their input and feedback on the draft General Plan • Coordinate with Montgomery Planning and work from core set of messages	• Support and approve the plan

Desired Outcomes: Internal Audience

Visioning Phase EXCITE	Analysis Phase EDUCATE	Feedback Phases ENGAGE	Submission Periods ENDORSE
• Confidently communicate how this General Plan is different from other plans • Understand the vision for the plan and their individual roles • Recognize communications and language must be audience-focused • Embrace that everyone is responsible for outreach + engagement • Consistently communicate General Plan talking points, use approved materials and follow comm best practices • Engage community leaders and subject-matter experts	• Engage community leaders and subject-matter experts to get feedback and input on specific subject areas • Embrace that everyone is responsible for outreach + engagement • Recognize that communications and language must be audience-centric • Consistently communicate General Plan talking points, use approved materials and follow communications best practices	• Plainly communicate rationale for General Plan draft recommendations • Be transparent about how community visioning feedback is reflected in draft • Engage community in feedback and discussion around draft plan; be prepared to field questions + anticipate response • Recognize that communications and language must be audience-centric • Embrace that everyone is responsible for outreach + engagement	• Plainly communicate rationale for General Plan draft recommendations, including how community visioning feedback is reflected in draft • Engage Planning Board and Council in feedback and discussion around draft plan; be well prepared to field questions and anticipate response • Recognize that communications and language must be audience-centric • Embrace that everyone is responsible for outreach + engagement

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Appendix C: Audience Backgrounder

Updated May 17, 2019

External Audiences

With external audiences, it is important to remember that Montgomery Planning is not the target audience. Communication strategies and implementation steps must be based on the reality of external audiences and consider audience-centric values, goals and challenges.

When communicating with diverse groups, we need to be mindful that audiences don't have the same context or level of knowledge as Montgomery Planning staff. Their reality and experiences differ from ours. And we should come at communications from a place that assumes that they're unaware of and likely don't care about what we're doing. So we must position communications in a way that makes the General Plan Update relevant to their realities.

For the General Plan Update, this effort will require a different approach to communications for Montgomery Planning -- one that makes all outreach about our audience, not about us. The communications strategy outlines this approach.

Outreach and engagement efforts will be directed at all county residents and businesses, with an emphasis on reaching audiences who are historically underrepresented in the planning process. These audiences are outlined on the following pages.

Note that the Montgomery Planning Research and Special Projects Division has provided data and maps to help us identify exactly where to reach some of our target audiences. Communications implementation planning will use that information to focus outreach efforts in targeted geographic areas.

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Audience	What we know about them	Where to reach	How to engage
Millennials	•Interested in disruption + innovation. •Care about work-life balance. •More likely to be digitally engaged. •Socially conscious. •Small percentage committed to staying in metro DC area. •Don't typically engage with government.	•Social media (incl. Nextdoor) •Text •Metro •Email •Paid influencers •Paid digital ads •Happy hours / wineries / breweries •Festivals / concerts / events •Earned media	•Less likely to attend traditional public meetings. •More likely to engage online; like interactive forums. •Crowdsourcing.
Audience	What we know about them	Where to reach	How to engage
Gen X / Millennial Families	•Care about / busy with children •Lack time •Transparency (open government) •Housing affordability an issue	•Through kids' schools/clubs •Family-focused outdoor events + activities •Libraries •Email •Civic associations, Nextdoor •Metro •Paid digital ads •Earned media •Social media (incl. Nextdoor)	•Webinars/live streaming •Forums where they have to be anyway (eg, school) •Civic association meetings •Kids' activities •Happy hours/kid-friendly breweries + wineries

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Foreign-born (many cultures + countries of origin represented in the county)	•Often part of faith communities •Some not familiar with democratic processes •May not be willing to speak in public forums •Varied cultural norms + gender roles •English proficiency may / may not be a barrier	•Cultural centers + CBOs •Via programs for children (eg, language school, cultural program) •Newspaper ads •Email •CBOs •Civic assoc., Nextdoor •Mail •Earned media	•Prefer Q&A meeting format •May be less likely to engage online •Via churches / faith communities •Work very closely with community and cultural orgs – co-host events •Use graphics + limit text
Latino families	•Care about family •Part of faith communities •Seeking economic opportunity •May not trust gov't •Heavier mobile users •Lack time	•Through kids + schools •Ads: Transit + newspaper •Transit flyers •CBOs •Pop-ups •Mail •Text to campaigns •Nextdoor •Earned media (Latino) •Phone calls •Radio	•Hold pop-up events where they are (shopping centers, transit centers, festivals) •Consider weekends and commute time •Less likely to engage online •Via church events •Segment can be reached through ESL classes, MCAAL, CCASA
Audience	**What we know about them**	**Where to reach**	**How to engage**
Renters	•Concerned with affordable housing	•Property managers (programming)	•At building-sponsored events

High School + College Students	•Think they're voice won't be heard •May lack parental support for participating •Not generally interested in government •Often lack transportation •Involved with many other activities – school, work, social	•Schools •Online •Paid influencers •Public transit •Malls	•Contests
Small business	•Invested in the community •More than just mom + pops	•Networking groups •Email •Coffee shops •Incubators •Chambers •Networking groups	•Ask for their expertise •Include solopreneurs, gig economy, creatives, prof services
CBOs + Community Leaders	•Invested in the community •Are influencers of the people they serve + have built-in communication networks. •Have special interests of their audiences in mind and may have valuable perspectives on major issues and plan elements. •Vary from small + scrappy to large + sophisticated.	•Meeting in a box •Briefing conversations •Calls + meetings with staff •Email	•Identify where relationships already exist and assign appropriate staff to be liaisons. •Hold briefings (in person and online) so they are involved and included from the start. •Develop Thrive champions program.

Thrive Montgomery 2050 Communications Plan
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Elected Officials

Who They Are	- They view themselves as setting vision for county. - Think planning = land use.
What We Know	Communication Opportunities - Forge stronger relationships. - Examine their agendas – where does the General Plan Update dovetail? - Newly elected council likely has good understanding of community values, wants, concerns. - Leverage where they're already communicating and convening. - They're looking for content and being a part of something positive. Communication Obstacles - Some aren't familiar with General Plan. - Others may not feel it needs to be updated. - Take the messaging off-track to meet their own goals. - May question MP's role in vision setting for county. - General Plan Update efforts may conflict with or detract from their own planning, outreach + engagement (and vice versa).
Where To Reach	- Planning Board Chair Casey Anderson check-ins - and other direct communications from leadership. - Email updates to council and staff. - Determine how can this help them fulfill promises and lend credibility. - Make advocacy to council an ask throughout engagement.
How To Engage	- One-on-One briefings - Identify places where outreach and engagement can serve multiple needs (eg, DEP; MCEDC). - Give them opportunities for positive public visibility.

Thrive Montgomery 2050 Communications Plan

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Montgomery Planning Staff

Who They Are	- Subject matter experts. - Work well with deadlines. - Looking for vision – want it to be strong and clear. - Some feeling out of the loop and concerned about work plans.
What We Know	Opportunities - Can use their expertise more broadly. - Will need to think differently about work of the department. - Learn from and about each other. - Opportunity to discover and create innovative engagement methods. - Opportunity to advance leadership - career opportunity to shine - Will require more collaboration across the department - Need to consider how General Plan will inform + improve future work Obstacles - Lack of familiarity with General Plan - Unsure of vision + what MP is working towards - Thinking tactically + short term (Morris column) - Not used to this type of planning - Trained to look at zoning + land use - Talk in planner-ese; highlighting awards, etc. - Need preparation + training to do outreach + engagement - Haven't started yet + short timeframe
Where To Reach	- Direction from leadership (emails, meetings, vlogs) - Via division chiefs - Regular opportunities to stay up-to-date and share progress
How To Engage	- Strong message + direction from leadership - Involve them in tactical outreach + engagement planning - Help them get out of their experience – together. Eg, a charette where they work on something other than their area of expertise OR Speed planning - asking each other questions about their own expertise - Media + outreach training - ongoing - Ongoing weekly all-hands meetings / stand up meetings - Need coordination + collaboration tool