



Agenda Item #18

**TOWN OF CAREFREE
INFORMATION SUMMARY**

MEETING DATE: October 4, 2022

SUBJECT: Review and approval of the project scope and fee proposal for the *Carefree General Plan 2040 Update*

ATTACHMENTS:

- Proposal for Consultant Services
- Project Scoping Memorandum

SUMMARY

This summer staff began the process of retaining a professional planning consultant skilled in updating general plans including innovative ways to engage the public. A Request for Proposals “RFP” was published in early August of 2022 and solicitation for proposals closed at the month’s end. Today after careful review, staff is pleased to recommend Michael Baker International as the selected consultant, and request that the mayor be authorized to enter into a contractual agreement for a fee not to exceed \$129,910.

Why hire a consultant for the *General Plan Update*? First, it is not unusual for municipalities large and small to hire a consultant to take on an *Update* process as it is a time-consuming endeavor that requires input from a variety of development sectors that are not always available inhouse. The *General Plan* requires a thoughtful and detailed study of a community, which includes data gathering and analysis, community outreach, well-crafted content, and an involved citizen participation process to thoroughly and successfully adopt and ratify the *Plan*. Currently, the Planning and Zoning Division is overtasked with its daily responsibilities as described at the April 12, 2022 budget workshop. The Planning Director oversees management of key development documents, meets with Commissioners, Councilmembers, citizens, applicants, businesses, and property owners and other interests to discuss development plans, cases, permits, and general development opportunities, works in concert with Economic Development to support revenue-related initiatives involving physical development, reviews zoning cases and building permits, fields zoning and development questions as well as reviews/resolves code enforcement issues, manages special projects such as the *Signage and Circulation Plan*, and along with the Planning Clerk manages the Planning and Zoning Division

archives. To lead a *General Plan Update* effort based on the scope of work detailed in the consultant's proposal would involve a time commitment that is not feasible based on her workload.

This is an exciting time for Carefree! Michael Baker International, who created the 2015 *Village Center Master Plan* and now updating/transitioning it into the Town's *Redevelopment Plan*, is well-positioned to carry on the *Update* effort with its working knowledge of Town policies, current initiatives and programs, data collection, and public interactions and viewpoints. They are also poised to engage in a robust public participation process with Town Council, Planning Commission, Town residents and property owners that requires quick responses, detailed explanations by experts on that topic, and planning on unexpected meetings to accommodate focused discussions that may arise during the process. As such, the proposed scope of work from the consultant has taken this into consideration. Please note that the original fee proposal stated in the RFP submittal was amended to include the optional public outreach tasks that staff feels must be included in the *Update* effort. This is an important investment, and we want to be sure everyone has an opportunity to be involved at some level.

ACTION NEEDED:

Authorize the mayor to execute a contract for professional services with Michael Baker International for the *Carefree General Plan 2040 Update* project.

FUNDING:

Funding was budgeted for these professional services in the 2022-2023 Fiscal Year's Operations Budget.

R E C E I V E D
AUG 29 2022
1:35 p.m.
Town of Carefree



August 29, 2022

PROPOSAL FOR CONSULTANT SERVICES
GENERAL PLAN UPDATE

SUBMITTED TO:

TOWN OF CAREFREE

RFP-2022-02

SUBMITTED BY:

Michael Baker

INTERNATIONAL



August 29th, 2022

Ms. Stacey Bridge-Denzak, Planning Director, Town of Carefree
8 Sundial Circle
PO Box 740
Carefree, Arizona 85377

RE: Consultant Services, General Plan Update (RFP-2022-02)

Dear Ms. Bridge-Denzak and Selection Committee Members:

As the Town of Carefree (Town) begins the task of updating the General Plan, the Town seeks a planning consultant team that will collaborate with residents, elected/appointed officials, and Town staff to develop a balanced and forward-thinking Plan to safeguard the quality of life for Carefree residents. This includes defining a plan that is more succinct and user friendly, which guides future development in a manner that does not compromise existing character, but also offers flexibility to make decisions that are in the best interest of the Town. Michael Baker is pleased to offer the following depth of knowledge and our accompanying qualifications in response to the Town's Request for Proposal.

OUR BACKGROUND KNOWLEDGE OF THE TOWN The Town is launching the preparation of this General Plan Update from a proactive starting point. Over the recent past, the Town has been busy initiating and completing a number of Town initiatives and projects. Michael Baker is honored and proud to have assisted the Town with the award winning Carefree Village Center Master Plan along with the ongoing work on the Village Center Redevelopment Plan. Our interaction on these planning documents allows Michael Baker to start from an advanced position relative to Town policies, current initiatives and programs, data collection and public interaction and viewpoints.

NEED FOR A DIVERSE LEVEL OF EXPERIENCE The Town's community-wide needs are diverse, which makes planning for that diversity dependent on a consultant that is knowledgeable on the many technical issues that go beyond fundamental land use planning, such as harmonizing commercial development in a manner that respects residential properties, balancing water resource needs and understanding the ongoing fire safety discussion within the community just to name a few. Michael Baker has career experiences working for public agencies within Maricopa County, across Arizona, and the Country, that yields our team a critical understanding of the dynamics of updating a General Plan within the context of these specialized needs.

EXPERIENCE DEVELOPING & UPDATING GENERAL PLANS Michael Baker has developed recent similar plans for Arizona municipalities that have comparable demographics to the Town and address the same State statute elements required for Carefree's General Plan Update. Michael Baker will use this deeply relevant experience to define an innovative plan, where the goals and policies of each element will work together to address the higher scrutiny that goes along with public concerns and desires in Carefree.

CONTINUITY & COMMITMENT FROM PERSONNEL Our team will be led by Project Director Kevin Kugler, AICP, and Project Manager, Matt Klyszeiko, AICP. Kevin and Matt have worked side-by-side for over 17 years, and will manage and integrate all aspects of the General Plan Update from start to finish, serving in the same roles they have on seven similar plans in the past five years. The Town will benefit from the continuity, proven client responsiveness and the creative and pragmatic approach of this leadership team. In his Project Director role, Kevin will guide overall project services and ensure all firm resources are made available as needed throughout the General Plan Update process, and Matt will be the primary point-of-contact and manage all day-to-day work from Michael Baker's Phoenix office.

AVAILABILITY OF LOCAL RESOURCES In addition to the core land use and development/policy planning experience required for this project, Michael Baker has a local team of nearly 65 staff in Phoenix, offering available and varied resources to provide specialized support services. Kevin has the full authority to call upon these resources to support specific elements of the General Plan. Further, as a local resident of the greater Carefree community, Matt is not only passionate about supporting his extended hometown area, but he is also physically available to meet with staff, stakeholders and residents on an as needed basis to ensure community concerns are addressed promptly and in a manner that contributes to the successful preparation of this General Plan Update.

EXPERTISE IN PUBLIC AND STAKEHOLDER OUTREACH Our skilled team members are well-known for developing a sense of transparency, trust and credibility with residents and project stakeholders over the life of the projects we work on. This trust and credibility greatly assists in achieving plan authenticity and community buy-in which are essential ingredients in obtaining voter ratification of the Plan. We are well-versed in successfully facilitating creative workshops and charrettes, surveys, open house events, focus groups, web-based engagement, newsletters and email blasts. Michael Baker has the in-house resources and expertise of traditional, virtual and social media oriented outreach methods, tools and technologies to notice and conduct surveys, focus groups, community conversations, meetings and hearings with Commission, Council, and public groups, and support these efforts with detailed maps and visually appealing printed and digital materials. As other clients have attested, our team has the unparalleled ability to relate and connect to residents and project stakeholders.

Michael Baker is excited for the opportunity to support the Town of Carefree in its efforts to prepare an effective and implementable plan. All conditions stated in this proposal are valid for 90 days. Project Manager Matt Klyszeiko, AICP, and the members of our team are dedicated and available to the Town's success and will not be changed.

Sincerely,



Kevin Kugler, AICP
Planning Operations Manager/Project Director
p. 602-798-7521 e. KKugler@mbakerintl.com
Authorized Principal to bind firm



Matt Klyszeiko, AICP
Planning Department Manager/Project Manager
p. 602-798-7513 e. matthewk@mbakerintl.com

Michael Baker
INTERNATIONAL

2. TABLE OF CONTENTS

1. COVER LETTER	i
2. TABLE OF CONTENTS	ii
3. DETAILED PROPOSAL/METHODOLOGY	1
4. FIRM/PROJECT TEAM ROLES	5
5. QUALIFICATIONS OF THE FIRM/PROJECT TEAM	6
6. RELEVANT EXPERIENCE/EXPERTISE AND REFERENCES	7
7. PERSONNEL	8
8. COST PROPOSAL (& COST PROPOSAL FORM)	9
9. PROJECT TIME SCHEDULE	11
10. DISCLOSURES	12
11. ADDITIONAL INFORMATION	12
12. PROPOSAL SIGNATURE PAGE	13
13. REFERENCE FORM	14

APPENDIX: RESUMES

3. PROPOSAL/METHODOLOGY

PROJECT APPROACH

As our project team reflected more on the issues and unique characteristics of Carefree’s past and present development, we identified a project approach for the Town’s consideration that is focused around four cohesive principals, which closely align with the Project Tasks outlined within the RFP:

● **RECOGNIZE** **Phase I**

The projects purpose is not to fulfill a void, rather it is to recognize the value in what exists today and build on that foundation to set a course for the future. As a result, at an early stage in the process, a complete diagnostic assessment of key community parameters and studies should be completed to establish a logical framework for future project decisions.

● **ENGAGE** **Phase II**

Public involvement should be inclusive and utilize a variety of mediums to effectively reach the broadest cross-section of residents, employers, and stakeholders. To that extent, we focus on a “go to them” outreach approach rather than holding a large number of special meetings requiring “them to come to us.”

● **ENRICH** **Phase III**

The project workflow should integrate expertise from a variety of disciplines to ensure the plan delineates and articulates innovative and robust solutions to complex planning issues. The core strength of our team is the ability to relate outreach findings to the communities we work in.

● **ACHIEVE** **Phase IV, V, VI**

The effort does not culminate at plan adoption, the true level of success is achieved during implementation. Our experience in working through the entire life cycle of urban planning projects enables us to provide actionable policies that can be carried forward by the community.

RECOGNIZE Project Start-Up

1.1 Scoping Meeting

Prior to beginning the planning process, key members of the Baker Team will facilitate a scoping meeting with Town staff to finalize plan elements, public engagement efforts, and establish project procedures and expectations. Agenda items will include: final work plan review; outline of public participation plan elements; project schedule; points of contact; deliverables; responsibilities and communication protocols; confirmation of Town Council and Planning Commission participation, stakeholder groups, organizations, and individuals; and preliminary identification of existing reports and mapping data.

Meetings and Deliverables: One scoping meeting, final work plan (electronic)

1.2 Project Immersion Summit

To begin the formal planning process from a complete and informed position regarding available resources and key issues facing the Town, Michael Baker will conduct a “Project Immersion Summit.” It is anticipated that this summit will occur over one day, however, accommodations can be made to ensure alignment with Town officials’ schedules. Specific components of the summit will include:

- An engaging and participatory meeting with Town Staff to gain a detailed understanding of all the technical considerations such as land use, transportation, infrastructure, environmental, and financial, that are key components of the General Plan.
- A series of interviews with Town Council Members and other key stakeholders to hear and record their perspectives relative to the Town as well as their desired outcomes relative to the General Plan Update process itself. While we have found conducting one-on-one interviews with Council Members allows for more detailed and candid conversations, this effort can alternatively be conducted as a work session to gain the collective input of the Town Council.

Meetings and Deliverables: Project Immersion meetings, agendas, presentations, and summaries (electronic)

1.3 Document Library & GIS Database Development

For background information and to assist in developing project graphics, Michael Baker will develop a comprehensive document library and a dedicated geodatabase. Necessary GIS data will be collected from the Town and appropriate agencies.

1.4 Existing Conditions Assessment Report

This task describes the work effort associated with preparing a background report that will be used to inform the development of decisions, goals, policies, exhibits and maps throughout the life of the project. This step is meant to take stock of existing reports, plans, social, natural, environmental and built resources, systems, and assets and convey their value as potential opportunities, constraints, or challenges.

Primary topics of this Existing Conditions Report will focus on two key aspects "Assessment of the Community" and "Assessment of the current General Plan". At a minimum, discussion of these key topics will be informed by the information collected in Task 1.3 and include analysis of key socio-demographic data and development trends along with future projections and assumptions relative to land use, density and intensity of growth. Specific topic areas relative to existing or anticipated needs associated with dark skies, harmonized commercial development, hazard mitigation and environmental protections will also be considered. All this information will be supplemented by other subjects identified as important by Town staff, elected officials, and stakeholders during the Project Immersion Summit.

Deliverable: Existing Conditions Assessment Report (Electronic)

ENGAGE *Visioning & Gathering Input*

While techniques may ultimately vary to address ongoing or new community-based issues that may arise during the project process, we anticipate a community-wide public engagement process that would, at a minimum, encompass the following key efforts.

2.1 Community Outreach & Participation Plan

As part of the project scoping meeting (Task 1.1), our team will review and discuss the goals and objectives of the community involvement process with Town staff. We will then prepare and assist in the adoption of a Community Outreach & Participation Plan that will be tailored to Carefree's specific needs and strategic requirements as well as meet Arizona Revised Statute requirements for Council adoption.

Meetings and Deliverables: Community Outreach & Participation Plan (electronic), Town Council Public Hearing

2.2 Visual Identity

Michael Baker's graphic designers, in coordination with Town staff, will create a unique graphic format and project branding to create a recognizable identity for the project and garner enthusiasm and unity. This brand will then be used for all project products, including the website, meeting materials, and planning documents.

2.3 Commission & Council Coordination

Woven throughout the project process, and specifically detailed in the Outreach & Participation Plan (Task 2.1), there will be a series of work sessions with the Planning Commission and Town Council. Members of the Michael Baker Team will meet with the Planning Commission and Council at key project milestones to seek guidance, review findings and/or plans and to prepare for formal public hearings. This Task includes up to four (4) work sessions/briefings facilitated as shown on the project schedule with both the Planning Commission and Town Council.

Deliverables: Work session preparation, attendance and facilitation; Preparation of presentation materials.

2.4 Project Website & Digital Engagement

Public participation in today's world requires a flexible, organic, and far-reaching approach that is featured across multiple media types. Michael Baker will work with Town staff to identify content for an inviting, user-friendly website for residents to learn, receive updates and notices, and stay involved with the project. The website will ensure the project is transparent in the public's eye and include responses to frequently asked questions and serve as a repository for project documents. During the scoping process Michael Baker will coordinate with Town staff to define a preferred website hosting approach.

Online surveys using tools such as Social Pinpoint or SurveyMonkey will also be used to provide an opportunity for community members to guide and refine proposed plan content within their busy lives.

2.5 Community Workshops

The Michael Baker Team will prepare for and facilitate two (2) public workshops along with up to two (2) discussion hubs associated with the General Plan Update planning process. For each workshop and discussion hub, meeting announcements will be prepared in coordination with Town staff for advertising and distribution. All draft materials will be carefully reviewed with Town Staff prior to their dissemination.

The following is a conceptual format for each set of workshops which will be modified and refined based on further discussion with Town Staff upon selection.

Community Workshop #1 – Public Kick-off & Visioning Validation

As one of the first steps in the planning process, Michael Baker will facilitate a project kick-off and community vision/goal setting workshop. This workshop will be conducted in a traditional in-person format and supported by a virtual option

for residents who may not be able to or comfortable with participating in-person. The information gained as part of this workshop will help to refresh or amend the existing General Plan vision statement and primary goals/objectives expressed in the current General Plan. A multi-media presentation and interactive exercises will be used to obtain feedback from the community.

Discussion Hubs

Discussion Hubs act like focus group workshops that are held to address specific issues where there is a diversity of perspectives within the Town. The goal of the Discussion Hub is to provide residents or stakeholders and elected officials both an opportunity to learn about and explore particular issues of interest in a deeper manner so as to identify common ground policies or actions that can be used to keep the overall General Plan Update process moving in a positive and unified direction. Michael Baker can coordinate the application of Discussion Hubs during the formal “scoping” process. Examples of topics that could be conducted as part of Discussion Hubs include: Economic Development, Water Resource Planning, Transportation trends or Sustainable Development practices.

Mobile Studios (Optional Task see pg. 4)

Mobile studios act like pop-up workshops in a booth and could be held at popular community events and locations throughout the Town. The goal of the mobile studio is to engage as many Carefree residents as possible, educate people about the importance of the General Plan update, and collect community input on the project. Michael Baker can coordinate the application of mobile studios during the formal “scoping” process, however, we strongly feel conducting such studios in the Post Office and/or Desert Gardens during special events would help to reach those residents that may not frequently participate in more traditional public meeting settings.

Community Workshop #2 – Administrative General Plan Draft Review

Identical to Workshop #1, the Michael Baker Team will conduct a traditional in-person style meeting supported by a virtual option for the public review and comment of the Draft General Plan Update. The meeting will be utilized to present key aspects of the draft plan and Michael Baker Team members will engage the community in open dialogue to seek their final concurrence on the plan and identify any remaining and/or necessary changes that must occur prior to finalizing the General Plan Update.

Meetings and Deliverables: Two (2) Community Workshops and up to two (2) Discussion Hubs. Baker will develop an agenda, sign in sheets, presentation material and produce all handouts and summaries for each meeting.

COMMUNITY HEALTH CONSIDERATIONS

In response to the continuously evolving COVID-19 pandemic, Michael Baker supports a comprehensive communication and outreach approach that utilizes modified traditional and innovative digital based methods that could include the following:

- » Business cards and/or Tabletop flyers with QR codes placed at key locations around Town to inform residents
- » Pop-up drive-in meeting locations to intercept residents where they frequently visit (i.e. Post Office) for casual conversations.
- » Interactive virtual open house meetings that place residents into a virtual space where they can participate in the same activities as a traditional workshop format.
- » Prerecorded presentations and educational videos that allow residents to listen to current project information or background material on key issues to help inform future decision making.
- » Web-based survey and mapping engagement tools like Social Pinpoint.

2.6 Outreach & Social Media

We will work with the Town to promote meetings, issues and opportunities for engagement and meeting notices via the Town’s existing Carefree Connection Newsletter and Twitter account or any other appropriate local association outlet accounts on Facebook, Nextdoor, and any other outlets as appropriate.

ENRICH Development of General Plan 2040

3.1 Determination of the General Plan Organizational Structure

The “Traditional” general plan structure that is organized around individual elements (i.e. land use, transportation, water resources) has served communities well over the past several decades. However, today, new trends in the organization of general plans are utilizing a “Systems Approach”. This format utilizes more common overarching themes (i.e. Sensitive Development, Connected Community, Vital Environment) to organize the general plan document and create stronger linkages between related topics. Using the knowledge gained in Phases I and II, Michael Baker will explore the benefits and disadvantages of these two General Plan organizational structures with Town staff and the Town Council to define a document format that best fits Carefree’s near-term and long-term needs.

Meetings and Deliverables: Draft Organizational Structure.

3.2 Administrative General Plan Draft

This Task will predominately focus on redrafting the text from the 2030 General Plan, rather than a complete rewrite of the entire document or completion of comprehensive map/land use changes. Based on preliminary review of the 2030 General Plan, it is believed that much of the foundational content is applicable, but could simply benefit from strategic rephrasing, simplification and/or reorganization of Plan content. While the final format of the Plan will be determined as part of Task 3.1., the plan will at minimum address the elements as outlined in the Scope of Work section of the Town’s Request for Proposals. These elements include: *Land Use, Circulation, Open Space, Growth, Environmental, Cost of Development, Water Resources, Public Services and Facilities and Implementation*. To assist in the draft review process, it is anticipated these elements will be drafted across three phases.

Meetings and Deliverables: Administrative General Plan Update Draft (electronic)

3.3 60-Day Public Review Draft

Following final direction from Town Staff, Commission and Council, Michael Baker will make all necessary revisions to the document in preparation for the state required 60-day public review period. This formal public review draft is intended for distribution to the general public as well as to other government agencies and stakeholders. Michael Baker will coordinate with Town staff for distribution of the 60-day review draft.

Meetings and Deliverables: 60-Day Public Review Draft (electronic)

ACHIEVE Public Body Recommendation & Approval, Ratification, & Project Close Out

Task 4.1: Final Plan

With and through guidance from the Town Project Manager, the Michael Baker Team will make any final necessary changes derived from final comments generated during the formal 60-day review period to prepare the Public Hearing Final Draft of the General Plan Update for Planning Commission consideration and Town Council adoption. Along with this effort, an Executive Summary of the 2040 General Plan will also be prepared.

Task 4.2: Public Hearings - Consideration of the Final General Plan Update

As part of the final adoption process, the Michael Baker Team will lead or co-facilitate with Town staff, one Planning & Zoning Commission and one Town Council public hearing to review

and discuss the project history and background of the General Plan Update process, description of key mapping components and policies as well as address any remaining issues and what the potential solution may be to those concerns. This Task includes up to three (3) work sessions and one (1) public hearing facilitated as shown on the project schedule with both the Planning Commission and Town Council.

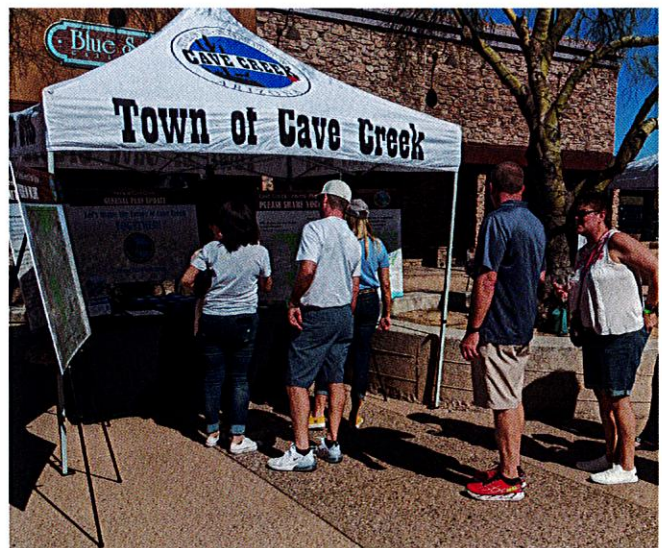
OPTIONAL TASKS

Option 1: Owner Initiated Tasks (Optional)

To give staff the flexibility to apply additional resources to strategically address unexpected requests or opportunities that arise during the General Plan Update process, this Task sets-aside funds to be used only as needed and only when specifically directed by staff in writing.

Option 2: Ratification Support (Optional)

Michael Baker will collaborate with Town staff to provide technical assistance during the ratification process. This includes helping prepare required election material, coordinating with media information requests, providing “e-reminders” of the General Plan availability, and producing “did you know” tutorials that outline key aspects of the plan.



SCHEDULE	
PROJECT PHASE	DURATION
Recognize - Phase I	October 2022 - February 2023
Engage - Phase II	November 2022 - January 2024
Enrich - Phase III	February 2023 - November 2023
Achieve - Phase IV	December 2023 - May 2024

Please see Section 9 for a detailed project schedule.

STAFFING PLAN	
Recognize - Phase I	Kevin Kugler, Matt Klyszeiko, Tristan Black-Colla, Steven Sifferman, Matt Gomez
Engage - Phase II	Kevin Kugler, Matt Klyszeiko, Tristan Black-Colla, Steven Sifferman, Matt Gomez
Enrich - Phase III	Kevin Kugler, Matt Klyszeiko, Tristan Black-Colla, Steven Sifferman, Matt Gomez
Achieve - Phase IV, V, VI	Kevin Kugler, Matt Klyszeiko, Tristan Black-Colla, Steven Sifferman, Matt Gomez
WORKLOAD	
STAFF/CAPACITY	CURRENT PROJECTS/ TIME ANTICIPATED
Kevin Kugler, AICP (35%)	MAG - McDowell Road Revitalization Plan (15%); Pinal County Red Rock SATS (%15); Pinal/Maricopa Regional Transportation Plan (25%); MCDOT Desert Hills ATS (%10)
Matt Klyszeiko, AICP (35%)	Goodyear General Plan Update (20%); Surprise General Plan Update (20%); Avondale General Plan Update (15%); Glendale Zoning Code Update (5%); Carefree Redevelopment Plan (5%)
Steven Sifferman, AICP (50%)	Avondale General Plan Update (20%); Carefree Redevelopment Plan (5%); Pinal/Maricopa Regional Transportation Plan (20%); TXDOT US 90 Corridor Study (%5)
Tristan Black-Colla, AICP (45%)	Goodyear General Plan Update (20%); Surprise General Plan Update (30%); Tucson Area Plan Technical Review (5%)
Matt Gomez (45%)	Goodyear General Plan Update (30%); Surprise General Plan Update (20%); Carefree Redevelopment Plan (5%)

4. FIRM/PROJECT TEAM ROLES

FIRM BACKGROUND

Michael Baker has been helping municipalities in Arizona to plan and develop communities and design, build, and maintain its infrastructure for over 35 years. Specializing in complex and demanding projects for the public sector, we are dedicated to the local community where we live and work and pride ourselves on our reputation of providing top quality service for local clients.

Supported by more than 3,500 employees in 90 offices worldwide, Michael Baker (founded in 1940) provides a full continuum of planning, engineering, surveying, and architectural services.

PHOENIX, AZ

Our Phoenix office employs 65 staff members, including nine planners, four AICP planners, and 22 Professional Engineers with planning and design specialties ranging from land use, economic development, water resources, traffic and transportation, environmental, utilities, and facilities. Since 1985, our talented professionals has provided a wide array of planning and engineering services to many urban and rural cities, counties, and state departments throughout Arizona.

Project Manager, Matt Klyszeiko is also a resident of the greater Carefree area. This allows Michael Baker to provide unmatched knowledge and direct accessibility to the Town.

TEAM MEMBERS/ROLES

Please see the Appendix for detailed biographies and project experience in the resumes.

- » **PROJECT DIRECTOR** - Kevin Kugler, AICP
- » **PROJECT MANAGER** - Matt Klyszeiko, AICP
- » **POLICY/PUBLIC OUTREACH** - Tristan Black-Colla, AICP
- » **TRANSPORTATION/GIS** - Steven Sifferman, AICP
- » **ANALYSIS/OUTREACH** - Matt Gomez

MICHAEL BAKER COMMUNITY PLANNING

Michael Baker creates, integrates, visualizes and communicates planning concepts as they move from the initial vision through implementation. Our planning professionals build strong client partnerships, working with residents, businesses, developers, state and local governments, the military and other federal agencies to successfully plan the future of their communities. We focus on people and places, improving communities and creating more sustainable, convenient, equitable, healthful, efficient, and attractive places.

In the last 10 years, Michael Baker has delivered more than 1,560 projects related to master and general plans or visioning initiatives -- 87% of which contained specific community and public involvement efforts. We offer the Town of Carefree more than 20 years of planning experience.

SIMILAR EXPERIENCE

Please see Section 6 for more details about our relevant projects listed below:

- » **CAVE CREEK GENERAL PLAN UPDATE** - The goal, establish a fresh perspective and planning approach that would gain consensus on key growth pressures facing the community and garner enhanced public support.
- » **PARADISE VALLEY GENERAL PLAN UPDATE** - Michael Baker utilized robust public outreach, which included extensive one on one “concierge” level of service to meet the expectations of the Towns dynamic population.
- » **GILBERT GENERAL PLAN UPDATE** - The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in the General Plan.
- » **CAREFREE VILLAGE CENTER MASTER PLAN** - This project focused on improving the vibrancy of this small town core by enhancing four key elements: Design, Economics, Promotion, and Organization.

SCOPE OF SERVICES PROVIDED

The services provided for the above projects include:

- » **POLICY LEVEL PLANNING** - General Plan Policy Development, Character and Urban Design Guidelines, Implementation Actions
- » **OUTREACH & ENGAGEMENT** - Workshops, Charrettes, Interactive surveys, Open houses, Focus groups, Newsletters, Email blasts, and Web-based engagement
- » **GEOGRAPHIC INFORMATION TECHNOLOGY** - Web-based GIS & maps, Needs analyses, System planning, Data conversion, User-friendly interface design
- » **MOBILITY & RECREATION PLANNING** - Transportation and Active Transportation planning, Complete Streets analysis, Traffic Assessment, Trails and Open Space planning
- » **CIVIL DESIGN & RESOURCE MANAGEMENT** - Infrastructure planning, water resources analysis, sustainability planning, natural resource conservation, public facility and safety analysis

5. FIRM/TEAM QUALIFICATIONS

PROVEN KNOWLEDGE & EXPERIENCE

As the Town of Carefree prepares to update its General Plan, it seeks a multi-disciplinary team with seasoned experiences that will represent the Town well. The Michael Baker team prides itself in having clients call upon us for their most challenging and compelling community based projects. Whether its tackling devise growth issues in Cave Creek as part of the Towns third attempt at updating their General Plan, or assisting the Town of Paradise Valley in developing a technical outreach approach that balanced a wide array of competing stakeholder objectives, the Michael Baker team has

earned a distinct reputation for delivering successful solutions with informed community consensus.

Michael Baker offers experienced planners and engineers that will cater to Carefree’s needs for this Plan. Michael Baker’s proposed local staff have spent their planning and design careers working throughout Arizona. In their decades of experience, they have not only overseen the development of General Plans, but have observed cities and towns implement them. This team understands what works well in Arizona and can offer recommendations about the most effective implementation measures.

PREVIOUS CONTRACTS FOR SIMILAR SERVICES

Name	Location	Completed
General Plan Update	Florence, AZ	Pending Ratification
General Plan Update	Paradise Valley, AZ	2022
General Plan Update	Gilbert, AZ	2020
General Plan Update	El Mirage, AZ	2020
General Plan Update	Somerton, AZ	2020
Carefree Village Master Plan	Carefree, AZ	2015

QUALIFICATIONS

a. Years in Business in Arizona: 37

b. Company Size & Organization: 3,500 employees; 90 offices nationwide; Corporation; 65 employees in Phoenix

6. RELEVANT EXPERIENCE/EXPERTISE & REFERENCES

CAVE CREEK GENERAL PLAN UPDATE |

Cave Creek, AZ (2021)

REFERENCE: Luke Kautzman, Town of Cave Creek | 480-488-6633; lkautzman@cavecreek.org | **COST:** \$60,130

Key Team Members: K. Kugler; M. Klyszeiko; T. Black-Colla; M. Gomez

In response to two failed attempts in 2016 and 2018 to gain voter ratification of the Cave Creek General Plan Update, Michael Baker was hired through a competitive proposal and interview process to assist the Town. The goal, establish a fresh perspective and planning approach that would gain consensus on key growth pressures facing the community and ultimately garner enhanced public support.

As a small, affluent, land locked community, known for its western heritage, open spaces, and large lot residential development patterns, Michael Baker approached this project by first establishing an outreach process that worked to validate the vision, values and goals which existed in the current General Plan to understand both what worked as well as where change was necessary. With this robust understanding of issues that included concerns for, non-residential development encroachment from Scottsdale and Phoenix, hillside development, dark skies, trail connections, traffic congestion and residential density increases, **Michael Baker deployed pop-up roadside drive-in workshops to engage residents** in a grassroots (COVID-friendly) manner that instilled feedback loops to allow residents to not only share input, but explore policy solutions directly related to issues that were most important to them. Through this transparent outreach process, Michael Baker identified simple and subtle adjustments to the plan to create a more consolidated, user-friendly systems approach. In response, Cave Creek Residents ratified the plan by a substantial margin.

EFFECTIVE OUTREACH

A simple community survey was widely distributed across online and offline platforms and collected **over 560 responses** as well as **50 pages** of individual resident comments that was transformed into supported Town policy.

PARADISE VALLEY GENERAL PLAN UPDATE | Paradise Valley, AZ (2022)

REFERENCE: Paul Michaud, Town of Paradise Valley | 480-348-3574; pmichaud@paradisivalleyaz.gov | **COST:** \$119,928

Key Team Members: K. Kugler; M. Klyszeiko; T. Black-Colla; M. Gomez

Paradise Valley has a well-deserved national reputation for a high quality of life. This is in part due to a strong foundation of deliberate low density planning, premier resort development and stunning natural beauty. Michael Baker embraced these assets and assisted the Town with preparation of the their Paradise Valley, Together 2022 General Plan Update. While the dynamic community has many assets to preserve, residents felt strongly that in order to be sure the community will continue to thrive in the decades to come, stronger and more clear General Plan policies were needed. Michael Baker utilized robust public outreach, which included extensive one on one "concierge" level of service to meet the expectations of the Towns dynamic population. As a result of meticulous attention to the manner in which maps were prepared and annotated as well as how policies were worded, how efforts were captured through a detailed implementation plan, and how terms were defined through a dedicated glossary, residents ratified the plan with an 81% approval rating.

STRATEGIC PROJECT MANAGEMENT

Dedicated "Discussion Hubs" were utilized to take complex and/or controversial topics offline so as to allow for more robust conversation and consensus building while avoiding impacts to other project tasks.

GILBERT GENERAL PLAN UPDATE | Gilbert, AZ (2020)

REFERENCE: Eva Cutro, Town of Gilbert | 480-503-6782; eva.cutro@gilbertaz.gov | **COST:** \$350,000

Key Team Members: K. Kugler; M. Klyszeiko; T. Black-Colla; S. Sifferman, M. Gomez

Michael Baker recently served as the Town's prime consultant for their comprehensive General Plan update that will lead landlocked Gilbert to its build-out condition by 2030. The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in

the General Plan. The result is a layered plan that focuses on specific themes that make Gilbert unique and exceptional rather than utilizing generic, predefined General Plan elements. This outcome required a comprehensive outreach and social media-rich digital engagement campaign. The final plan was also translated into an online viewing platform allowing for both a traditional (and amendable) print version along with a html-based interactive Plan. Effective planning, document organization and proactive outreach efforts resulted in an **80% public approval vote** for this General Plan in August of 2020.

PROVEN APPROACH

A thoughtful reorganization of the plan to a system approach placed an emphasis on what mattered most to residents while helping staff to more effectively implement the plan in unison with Town-wide initiatives.

Through innovative plan development concepts and robust, grass roots based public involvement efforts Michael Baker developed an actionable and community supported Master Plan. This master plan effort focused on improving the vibrancy of the small town core, while balancing the communities desire to preserve the desert character of the surrounding community and mitigate impacts to adjacent residential development through enhancing four key elements: Design, Economics, Promotion, and Organization. Michael Baker also performed a demographic analysis; a market analysis; and a retail and commercial demand analysis. To gain community buy-in to plan elements, Michael Baker implemented a strategic education and listening campaign that include extensive stakeholder interviews, multiple Council work sessions, and a Town-wide design charrette. Since implementation in June 2015, Town leaders have adapted plan recommendations into initiatives and completed the construction of several projects within the Village Center.

BALANCING CHARACTER & ECONOMICS

The need to allow for the continued economic growth of resort based uses within the community while protecting the quality of life that residents valued required simple yet innovative policy, design and implementation measures.

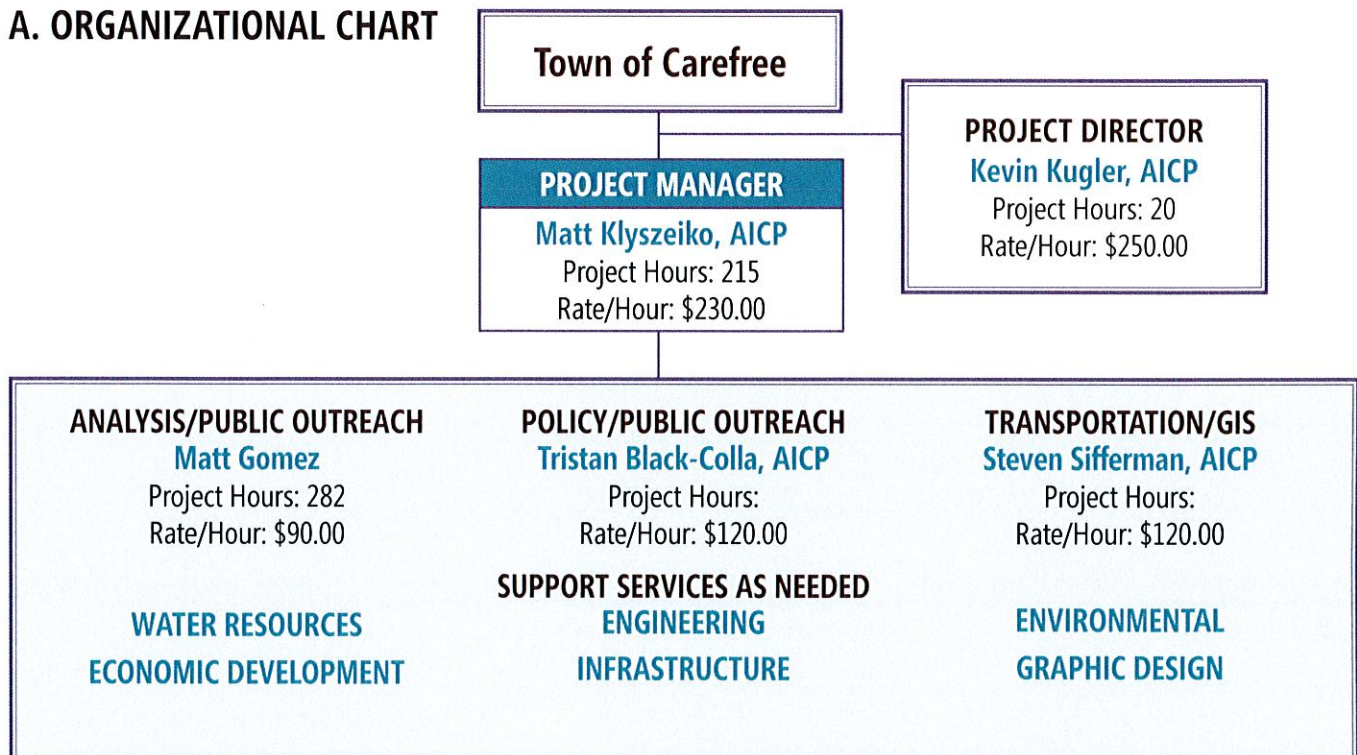
CAREFREE VILLAGE CENTER MASTER PLAN | Carefree, AZ (2015)

REFERENCE: Gary Neiss, Town of Carefree | 480-488-3686; gary@carefree.org | **COST:** \$145,890

Key Team Members: K. Kugler; M. Klyszeiko

7. PERSONNEL

A. ORGANIZATIONAL CHART



B. TIME WITH FIRM/COMPARABLE PROJECTS

PROJECT DIRECTOR - Kevin Kugler, AICP | 18 years

- » Cave Creek General Plan Update - Project Director
- » Paradise Valley General Plan Update - Project Director
- » Gilbert General Plan Update - Project Director
- » Carefree Village Center Master Plan - Project Director

PROJECT MANAGER - Matt Klyszeiko, AICP | 18 years

- » Cave Creek General Plan Update - Project Manager
- » Paradise Valley General Plan Update - Project Manager
- » Gilbert General Plan Update - Project Manager
- » Carefree Village Center Master Plan - Project Manager

POLICY/OUTREACH - Tristan Black-Colla, AICP | 4 years

- » Cave Creek General Plan Update - Community Planner
- » Gilbert General Plan Update - Planning Associate
- » Surprise General Plan Update* - Planning Associate

TRANSPORTATION/GIS - Steven Sifferman, AICP | 1 years

- » Surprise General Plan Update* - Planning Associate
- » Avondale General Plan Update* - Planning Associate
- » Carefree Village Center Redevelopment Plan* - Planning Associate

ANALYSIS/OUTREACH - Matt Gomez | 4 years

- » Cave Creek General Plan Update - GIS & Planning Support
- » Paradise Valley General Plan Update - GIS & Planning Support
- » Carefree Village Center Redevelopment Plan * - GIS & Planning Support

* Details on the Above Projects

CAREFREE VILLAGE CENTER REDEVELOPMENT PLAN

CONTRACT DATES: 2021-2022

OWNER/REFERENCE: Town of Carefree, Steve Prokopek, (623) 694-2605

Michael Baker is currently assisting the Town with preparing a Redevelopment Plan for the Village Center based on the existing 2015 Master Plan.

SURPRISE GENERAL PLAN UPDATE

CONTRACT DATES: 2022-2024

OWNER/REFERENCE: City of Surprise, Jason Moquin, (623) 222-3045

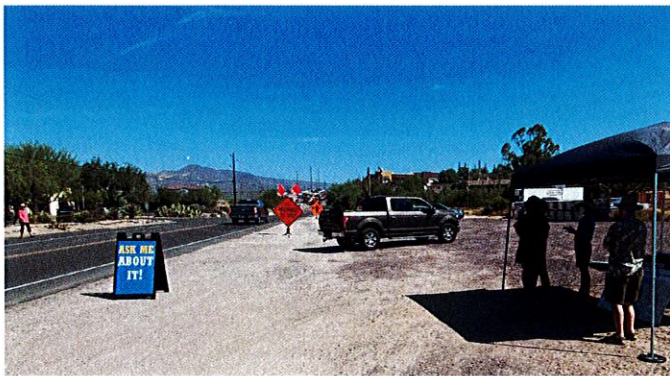
Michael Baker is assisting the city with their comprehensive 2040 General Plan Update.

AVONDALE GENERAL PLAN UPDATE

CONTRACT DATES: 2022-2023

OWNER/REFERENCE: City of Avondale, Jodie Novak, (623) 333-4015

Michael Baker is assisting the City with conducting outreach and completing select updates to the existing General Plan.



8. COST (AND COST PROPOSAL FORM)

Michael Baker understands the Town's approach is to split the project budget over the 22-23 and 23-24 fiscal years and the need to conduct preliminary work within fiscal year 22-23,

with the majority of expenditures incurred in fiscal year 23-24. The following cost proposal details this approach.

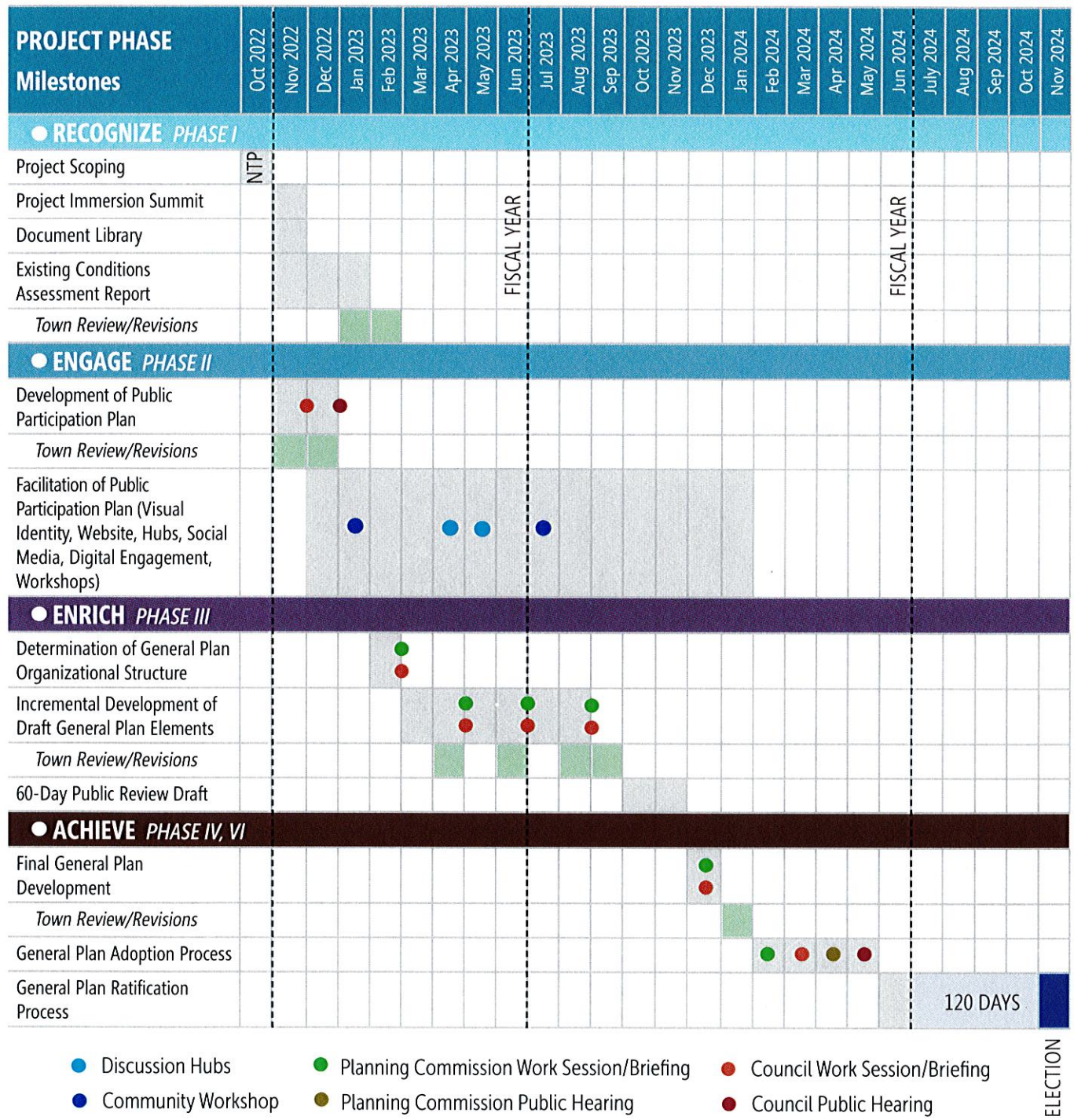
COST PROPOSAL FORM

Company Name: Michael Baker International, Inc.

TOWN OF CAREFREE GENERAL PLAN UPDATE PROJECT BUDGET	PROJECT DIRECTOR	PROJECT MANAGER	POLICY PLANNER & PO	PLANNER & GIS	ANALYSIS & PO	TOTAL TASK HRS	TASK FEE
	\$250.00	\$230.00	\$120.00	\$120.00	\$90.00		
PHASE I - RECOGNIZE							\$24,620
TASK 1.1: SCOPING MEETING (& ONGOING PROJECT COORDINATION)	2	20				22	\$5,100
TASK 1.2: PROJECT IMMERSION	2	10	16		10	38	\$5,620
TASK 1.3: DOCUMENT LIBRARY & GIS DATA							\$0
TASK 1.4: EXISTING CONDITIONS ASSESSMENT REPORT	1	15	15	40	40	111	\$13,900
PHASE II - ENGAGE							\$46,140
TASK 2.1: COMMUNITY OUTREACH & PARTICIPATION PLAN	1	12	8		8	29	\$4,690
TASK 2.2: VISUAL IDENTITY		1		15		16	\$2,030
TASK 2.3: COMMISSION & COUNCIL COORD. (INCLUDES 4 COM. & TC BRIEFINGS EA.)		35	20	20	20	95	\$14,650
TASK 2.4: PROJECT WEBSITE & DIGITAL ENG.		20			80	100	\$11,800
TASK 2.5: COMMUNITY WORKSHOPS/ DISCUSSION HUBS (INCLUDES 2 COM. WKSP & 2 DIS. HUBS)		20	20	25	25	90	\$12,250
TASK 2.6: SOCIAL MEDIA					8	8	\$720
PHASE III - ENRICH							\$38,620
TASK 3.1: GENERAL PLAN ORG. STRUCTURE		8		20	10	38	\$5,140
TASK 3.2: ADMINISTRATIVE GP DRAFT	4	40	40	80	80	244	\$31,800
TASK 3.3: 60-DAY PUBLIC REVIEW DRAFT			8		8	16	\$1,680
PHASE IV, VI - ACHIEVE							\$7,920
TASK 4.1: FINAL PLAN	2	5		10	15	32	\$4,200
TASK 4.2: PUBLIC HEARINGS		12		8		20	\$3,720
TOTAL PROJECT HOURS	12	198	127	218	304	859	
SUBTOTAL							\$117,300
REIMBURSABLE (MILEAGE, MEALS, REPROGRAPHICS, PUBLIC MEETING MATERIALS)							\$1,800
LUMP SUM							\$119,100

TOWN OF CAREFREE GENERAL PLAN UPDATE PROJECT BUDGET	PROJECT DIRECTOR	PROJECT MANAGER	POLICY PLANNER & PO	PROJECT PLANNER		TASK FEE
	\$250.00	\$230.00	\$120.00	\$120.00	\$90.00	
OPTIONAL TASKS						
OPTION 1 - OWNER INITIATED TASKS		8		15	15	\$4,990
OPTION 2 - GENERAL PLAN RATIFICATION SUPPORT (RFP PHASE V)		9		18	18	\$5,850
OPTION 5 - ADDITIONAL MEETING ATTENDANCE (BASED ON HOURLY RATES)						HOURLY RATE

9. PROJECT TIME SCHEDULE



- Discussion Hubs
- Planning Commission Work Session/Briefing
- Council Work Session/Briefing
- Community Workshop
- Planning Commission Public Hearing
- Council Public Hearing

ELECTION

10. DISCLOSURES

Michael Baker International, Inc. does not have any professional or personal financial interest, which could be a possible conflict of interest in providing products and services to the Town.

11. ADDITIONAL INFORMATION

A. CERTIFICATION AS A MINORITY OWNED, WOMEN OWNED, OR DBE, IF APPLICABLE.

Not applicable

B. ADDITIONAL INFORMATION

Not applicable.

C. EXCEPTIONS TAKEN TO THE TERMS & CONDITIONS

None

12. PROPOSAL SIGNATURE PAGE

PROPOSAL SIGNATURE PAGE

The undersigned hereby offers and agrees to furnish the material, or service, in compliance with all the terms and conditions, instructions, and any amendments contained in this Request for Proposal document.

Michael Baker International, Inc.

Company Name

2929 N. Central Avenue, Suite 800

Address

Phoenix

City

Arizona

State

602-798-7521

Telephone Number

August 29, 2022

Date



Signature of Authorized Person

Kevin Kugler, AICP

Printed Name

Planning Operations Manager

Title

(602) 279-1411

Fax Number

kkugler@mbakerintl.com

E-Mail Address

Proposal must be signed by a duly authorized representative eligible to sign contract documents for the firm. Consortiums, joint ventures, or teams submitting proposals will not be considered Responsive Proposal(s) unless it is established that all contractual responsibility rests solely with one Consultant or one legal entity. The Proposal must indicate the responsible entity.

Offerors should be aware that joint responsibility and liability will attach to any resulting contract and failure of one party in a joint venture to perform will not relieve the other party or parties of total responsibility for performance.

13. REFERENCE FORM

REFERENCE FORM

Please list a minimum of three (3) owner references from similar projects whom the Town may contact:

1. Company: Town of Cave Creek

Contact Name: Luke Kautzman Phone: (480) 488-6633

Email: lkautzman@cavecreek.org

Project Name: Cave Creek General Plan Update

Project Cost: \$60,130

Project Description: General plan update for a small, affluent, land locked community, known for its western heritage, open spaces, and large lot residential development.

2. Company: Town of Paradise Valley

Contact Name: Paul Michaud Phone: (480) 348-3574

Email: pmichaud@paradisevalleyaz.gov

Project Name: Paradise Valley General Plan Update

Project Cost: \$119,928

Project Description: General plan update that utilized robust public outreach, which included extensive one on one "concierge" level of service to meet the expectations of the Towns dynamic population.

3. Company: Town of Gilbert

Contact Name: Eva Cutro Phone: (480) 503-6782

Email: eva.cutro@gilbertaz.gov

Project Name: Gilbert General Plan Update

Project Cost: \$350,000

Project Description: General plan update for a land locked community known for its quality of life, importance on family, faith, and community, and pride in its agricultural heritage.

RESUMES | PROJECT DIRECTOR

KEVIN KUGLER, AICP

Kevin offers extensive experience in leadership and project management over numerous municipal planning, design, and development projects. His experience includes the management and oversight of a wide array of multi-disciplinary teams and planning projects, General Plan updates, streetscape designs, city center master planning, visioning and theming, economic impact studies, and associated public involvement efforts. Kevin's background includes 12 years managing municipal planning departments in Show Low and Goodyear. His unique project experiences helps to provide insight into many of the growth and policy dynamics City's face, as well as understand how to build an atmosphere of collaboration, trust, and confidence with stakeholders.

EXPERIENCE: 31 years (18 with Michael Baker)

AVAILABILITY: 35%

EDUCATION: M.E.P., Urban and Regional Planning; B.S., Business Administration

AFFILIATIONS: American Institute of Certified Planners; American Planning Association; Urban Land Institute; Valley Partnership

GENERAL PLAN UPDATE | CAVE CREEK, AZ | 2021 | PROJECT DIRECTOR

Kevin was responsible for project management oversight and quality control. Michael Baker is currently assisting in the process of updating the Town's General Plan. Michael Baker approached this project by first establishing an outreach process that worked to validate the vision, values, and goals which existed in the current General Plan to understand both what worked as well as where change was necessary. Michael Baker deployed pop-up roadside drive-in workshops to engage residents in a grassroots (COVID friendly) manner that instilled feedback loops to allow residents to not only share input, but to explore policy solutions directly related to issues that were most important to them.

GENERAL PLAN UPDATE | GILBERT, AZ | 2020 | PROJECT DIRECTOR

Kevin was responsible for project management oversight and quality control. Michael Baker recently served as the Town's prime consultant for their comprehensive General Plan update that will lead landlocked Gilbert to its build-out condition by 2030. The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in the General Plan. Effective planning, document organization and proactive outreach efforts resulted in an 80% public approval vote for this General Plan in August of 2020.

GENERAL PLAN UPDATE | PEORIA, AZ | 2018 | PROJECT DIRECTOR

Kevin was responsible for project management oversight and quality control. Michael Baker assisted in the process of updating the City of Peoria's General Plan. Primary responsibilities include analyzing and drafting the City's Circulation, Historic Resources, Revitalization and Redevelopment, Cost of Development, Public Services and Facilities, and Arts and Culture elements. Michael Baker utilized information from the Existing Conditions Report along with public input, Council direction, and evaluation of current studies and programs to draft goals and policies that will guide Peoria over the next 20 years. This work specifically incorporated active transportation recommendations to enhance the overall transportation system, strategic redevelopment and historic preservation measures focused on the City's Old Town district, and sustainable water and wastewater management practices.

SAN TAN VALLEY SPECIAL AREA PLAN | PINAL COUNTY, AZ | 2018 | PROJECT DIRECTOR

Kevin was responsible for project management oversight and quality control. Michael Baker assisted with the development of a special area plan for the large unincorporated community. Our team worked to evaluate and establish public policy and planning guidance relative to land use, transportation systems, open space and natural resources, and public facilities and services. The project also completed a "health in all policies" program initiative that includes an HIA for the planning area.

GENERAL PLAN UPDATE | SCOTTSDALE, AZ | 2014 | PROJECT FACILITATOR

Kevin assisted in the facilitation of task force meetings and led the development and participation in community open houses. Tasks included strategizing and developing materials and techniques to provide notification to a broad constituency of citizens.

RESUMES | PROJECT MANAGER

MATT KLYSZEIKO, AICP

Matt is an experienced project manager skilled in several facets of planning, including technical research, land use policy, zoning regulations, urban design, and economic development. His many strengths are showcased through his robust experience of multidimensional projects that range from developing design guidelines to completing long-range planning documents for both small and large communities. This experience is complimented by his universal commitment to facilitating community building through meaningful public involvement that communicates between diverse interests, facilitates decision making, and bridges the gap between technical experts and the general public. Matt also excels at simplifying the complex, by translating ideas, concepts and plans into visual communications with easy to understand graphics that better define viable places and ultimately enrich our built environment.

EXPERIENCE: 22 years (18 with Michael Baker)

AVAILABILITY: 35%

EDUCATION: B.S., Urban Planning

AFFILIATIONS: American Planning Association; American Institute of Certified Planners

GENERAL PLAN UPDATE | CAVE CREEK, AZ | 2021 | PROJECT MANAGER

Matt was responsible for project management oversight and quality control. Michael Baker is currently assisting in the process of updating the Town's General Plan. Michael Baker approached this project by first establishing an outreach process that worked to validate the vision, values, and goals which existed in the current General Plan to understand both what worked as well as where change was necessary. Michael Baker deployed pop-up roadside drive-in workshops to engage residents in a grassroots (COVID friendly) manner that instilled feedback loops to allow residents to not only share input, but explore policy solutions directly related to issues that were most important to them. This General Plan Update is now scheduled to seek voter ratification in May of 2021.

GENERAL PLAN UPDATE | GILBERT, AZ | 2020 | PROJECT MANAGER

Matt was responsible for project management oversight and quality control. Michael Baker recently served as the Town's prime consultant for their comprehensive General Plan update that will lead landlocked Gilbert to its build-out condition by 2030. The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in the General Plan. Effective planning, document organization and proactive outreach efforts resulted in an 80% public approval vote for this General Plan in August of 2020.

GENERAL PLAN UPDATE | PEORIA, AZ | 2018 | PROJECT MANAGER

Matt was responsible for analyzing and drafting the City's Circulation, Historic Resources, Revitalization and Redevelopment, Cost of Development, Public Services and Facilities, and Arts and Culture elements. Michael Baker assisted in the process of updating the City of Peoria's General Plan. Michael Baker utilized information from the Existing Conditions Report along with public input, Council direction, and evaluation of current studies and programs to draft goals and policies that will guide Peoria over the next 20 years. This work specifically incorporated active transportation recommendations to enhance the overall transportation system, strategic redevelopment and historic preservation measures focused on the City's Old Town district, and sustainable water and wastewater management practices.

CAREFREE VILLAGE CENTER MASTER PLAN | CAREFREE, AZ | 2015 | PROJECT MANAGER

Matt was responsible for project management oversight and quality control. Michael Baker assisted the Town with plan development and public involvement in the development of actionable implementation tasks. This project is focused on improving the vibrancy of this small town core by enhancing four key elements: Design, Economics, Promotion, and Organization. Following the completion of an extensive Town Center assessment that included stakeholder interviews, Council work sessions, and design charrettes, the project is now formulating specific project recommendations that will be implemented over near and long term periods.

RESUMES | POLICY/PUBLIC OUTREACH

TRISTAN BLACK-COLLA, AICP

Tristan is a senior community and mobility planner focused on equitable approaches and solutions. She is passionate about context-sensitive goals and actionable policy guidance. Tristan is committed to shaping communities into their aspirational vision while honoring their foundations.

GENERAL PLAN UPDATE | CAVE CREEK, AZ | 2021 | COMMUNITY PLANNER

Tristan drafted policies, authored the first-ever Wildfire Resiliency element, and supported public outreach efforts including community workshops and the Cave Creek Beer Festival. Michael Baker is currently assisting in the process of updating the Town’s General Plan. Michael Baker approached this project by first establishing an outreach process that worked to validate the vision, values, and goals which existed in the current General Plan to understand both what worked as well as where change was necessary.

VISUALLY SIGNIFICANT MASTER PLAN | PARADISE VALLEY, AZ | 2018 | MOBILITY PLANNER

Tristan assisted with graphic design and provided public outreach support. Michael Baker lead the public outreach for the process to develop the master plan of prominent streets, primarily Lincoln Drive and Tatum Boulevard, that demonstrate the character of the Town. The purpose of the plan is to provide consistent gateway elements and streetscape themes. The streetscape includes a variety of elements such as vehicle travel lanes, bike lanes, sidewalks, utility poles, trees, accent plantings, lighting, and signage.

2040 INTO VIEW GENERAL PLAN UPDATE | EL MIRAGE, AZ | 2020 | PLANNING ASSOCIATE

Tristan coauthored elements and provided public involvement support. The Michael Baker team assisted in the comprehensive General Plan update that created a blueprint for development over the next 20 years. The Michael Baker Team established a diverse public outreach and participation plan which aided in the creation of the following elements; recreation and open space, land use, circulation, economic development, growth areas, cost of development, water resources, conservation & redevelopment, neighborhood health, and public facilities and services.

GENERAL PLAN UPDATE | GILBERT, AZ | ONGOING | PLANNING ASSOCIATE

Tristan coauthored elements and provided public involvement support. Michael Baker recently served as the Town’s prime consultant for their comprehensive General Plan update that will lead landlocked Gilbert to its build-out condition by 2030. The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in the General Plan. Effective planning, document organization and proactive outreach efforts resulted in an 80% public approval vote for this General Plan in August of 2020.

COMPREHENSIVE DESIGN GUIDELINES | MESA, AZ | ONGOING | PLANNING ASSOCIATE

Tristan coauthored guidelines, created graphics, and provided public involvement support. Michael Baker is currently evaluating the City of Mesa’s Adaptive Reuse Program and various Design Guidelines throughout the City to create a seamless, overarching document that will provide city-wide guidance for development over the next 20 years. Michael Baker is outlining policies regarding land use, transportation, accessibility, open space, design, and historic preservation, and adaptive reuse opportunities that will all aid in creating a more unified and successful Mesa.

EXPERIENCE: 6 years (4 with Michael Baker)

AVAILABILITY: 45%

EDUCATION: M.U.E.P., Transportation and Urban Planning; B.S., Urban/Environmental Planning

AFFILIATIONS: American Planning Association; American Institute of Certified Planners

RESUMES | TRANSPORTATION PLANNING/GIS

STEVEN SIFFERMAN, AICP

Steven’s project experience lies at the nexus of transportation and community planning with involvement in general plans, economic development studies, municipal and regional transportation master plans, multimodal studies, corridor studies, and transit feasibility studies. Steven excels at integrating innovative geospatial analyses within planning processes to streamline data collection while arriving at data driven results shaping strategies to improve mobility and access creating vibrant, livable communities.

EXPERIENCE: 8 years (1 with Michael Baker)

AVAILABILITY: 50%

EDUCATION: B.S. Urban Planning; B.A. Sustainable Urban Dynamics

AFFILIATIONS: American Planning Association; American Institute of Certified Planners

GENERAL PLAN UPDATE | GOODYEAR, AZ | ONGOING | PROJECT PLANNER

Steven is assisting with completing a comprehensive and detailed update to the City’s General Plan and Zoning Code. This project is focused on protecting the City’s past while expanding its future through safeguarding the quality of life for residents and encouraging economic prosperity. The specific workflow for this project included updating the City’s entire planning GIS database, reviewing City and regional transportation planning to guide adjustments to land uses, coordination of public outreach and participation, creation of alternative land use plans.

GENERAL PLAN UPDATE | SURPRISE, AZ | ONGOING | PROJECT PLANNER

Steven is responsible for drafting final work products including updating all the existing General Plan exhibits and updating the Transportation element. This general plan update is focused on helping to guide development over the next 20 to 25 years. The project includes extensive public involvement that has involved interviews with community leaders, steering committee members, and city staff; and public workshops.

GENERAL PLAN UPDATE | AVONDALE, AZ | ONGOING | PROJECT PLANNER

Steven is responsible for assisting with project management and quality control. Michael Baker is assisting with completing select edits to portions of the existing General Plan in order to incorporate current City initiatives. Tasks include, comprehensive update of GIS data, strategizing and developing materials and techniques to provide notification to a broad constituency of citizens including workshops, focus groups, and other promotional materials.

REDEVELOPMENT PLAN | CAREFREE, AZ | ONGOING | PROJECT PLANNER

Michael Baker served as the City’s original consultant for this update to the 2015 Village Center Master Plan. Steven is assisting with providing GIS and graphic design support as part of the preparation of the Village Center Redevelopment Plan. Steven is responsible for evaluating staff and stakeholder input and translating comments to ensure all text and graphics are consistent with the defined vision. This project involved the challenge of incorporating current revisions in a manner that is budget friendly while preserving overall quality and clarity.



RESUMES | ANALYSIS/PUBLIC OUTREACH

MATT GOMEZ

Matt is well-versed in land use planning, active transportation and mobility, economic development and placemaking, and long range comprehensive planning. He is skilled in geospatial analysis, graphic design, and innovative public outreach methods.

GENERAL PLAN UPDATE | CAVE CREEK, AZ | 2021 | GIS & PLANNING SUPPORT

Matt serves as the GIS Lead providing geospatial analysis to guide policy decisions. Michael Baker is currently assisting in the process of updating the Town's General Plan. Michael Baker approached this project by first establishing an outreach process that worked to validate the vision, values, and goals which existed in the current General Plan to understand both what worked as well as where change was necessary. Michael Baker deployed pop-up roadside drive-in workshops to engage residents in a grassroots (COVID friendly) manner that instilled feedback loops to allow residents to not only share input, but to explore policy solutions directly related to issues that were most important to them.

EXPERIENCE: 3 years (3 with Michael Baker)

AVAILABILITY: 45%

EDUCATION: M.U.E.P., Urban and Environmental Planning; B.S., Urban/Environmental Planning

AFFILIATIONS: American Planning Association

GENERAL PLAN UPDATE | EL MIRAGE, AZ | 2020 | GIS & PLANNING SUPPORT

Matt was responsible for GIS analysis and graphic design, as well as public involvement support. The Michael Baker team is assisting in the creation of a comprehensive General Plan update that will create a blueprint for development over the next 20 years. While small in area, El Mirage has experienced a very significant population boom in the past 40 years along with most west valley cities that have or currently are transitioning from rural agriculture to more suburban residential land uses.

GENERAL PLAN UPDATE | GILBERT, AZ | 2020 | GIS & PLANNING SUPPORT

Matt was responsible for GIS analysis and economic edge analysis, graphic design, and public involvement support. Michael Baker recently served as the Town's prime consultant for their comprehensive General Plan update that will lead landlocked Gilbert to its build-out condition by 2030. The Michael Baker Team used an innovative and interactive systems approach to restructure and update all of the 17 elements in the General Plan. Effective planning, document organization and proactive outreach efforts resulted in an 80% public approval vote for this General Plan in August of 2020.

GENERAL PLAN UPDATE | SOMERTON, AZ | 2020 | GIS & PLANNING SUPPORT

Matt was the primary author of the City's first-ever Economic Development Element included in this update. This general plan update focused on "Re-Envisioning" Somerton by helping to guide development over the next 20 to 25 years. The project incorporated an extensive public involvement effort that included interviews with community leaders, steering committee members, and city staff; public workshops that incorporated interactive audience response technology and "Somerton the Board Game" design activities; youth design workshops and surveys; and newspaper articles and public ad campaign.

Michael Baker assisted the City with their 2020 General Plan Update. As a rural city with agriculture playing a key role in the local economy, the city looked to revitalize their downtown and attract more diverse employers while maintaining their agricultural heritage. Matt was the primary author of the City's first Economic Development Element included in this update.

GENERAL PLAN UPDATE | PAGE, AZ | 2019 | GIS & PLANNING SUPPORT

Matt served as GIS Lead for the update to the land use plan to bring it into compliance with state statutes, as well as created an aggregate mining map to meet state-mandated requirements for aggregate material resource preservation. Michael Baker worked closely with the City of Page to prepare key updates to the General Plan. These updates focused on areas of deficiency such as plan administration and amendment criteria as well as statutory compliance issues related to land use considerations.

Project Scoping Memorandum

To: Stacey Bridge-Denzak,
Planning Director and Zoning Administrator
Town of Carefree

Date: September 22, 2022

From: Matt Klyszeiko, AICP
Michael Baker International
matthewk@mbakerintl.com
602.798.7513

Project: Town of Carefree – General Plan Update

Subject: Project Scope, Fee, & Schedule

PROJECT DESCRIPTION

The Town seeks a planning approach that will collaborate with residents, elected/appointed officials, and Town staff to develop a balanced and forward-thinking General Plan to safeguard the quality of life for Carefree residents. This includes defining a plan that is more succinct and user friendly, which guides future development in a manner that does not compromise existing character, but also offers flexibility to make decisions that are in the best interest of the Town. Michael Baker is pleased to offer the following scope and fee in response to the Town’s General Plan Update project:

RECOGNIZE: Project Start-Up

1.1 Scoping Meeting

Prior to beginning the planning process, key members of the Baker Team will facilitate a scoping meeting with Town staff to finalize plan elements, public engagement efforts, and establish project procedures and expectations. Agenda items will include: final work plan review; outline of public participation plan elements; project schedule; points of contact; deliverables; responsibilities and communication protocols; confirmation of Town Council and Planning Commission participation, stakeholder groups, organizations, and individuals; and preliminary identification of existing reports and mapping data.

Meetings and Deliverables: One scoping meeting, final work plan (electronic)

1.2 Project Immersion Summit

To begin the formal planning process from a complete and informed position regarding available resources and key issues facing the Town, Michael Baker will conduct a “Project Immersion Summit.” It is anticipated that this summit will occur over one day, however, accommodations can be made to ensure alignment with Town officials’ schedules. Specific components of the summit will include:

- An engaging and participatory meeting with Town Staff to gain a detailed understanding of all the technical considerations such as land use, transportation, infrastructure, environmental, and financial, that are key components of the General Plan.
- A series of interviews with Town Council Members and other key stakeholders to hear and record their perspectives relative to the Town as well as their desired outcomes relative to the General Plan Update process

itself. While we have found conducting one-on-one interviews with Council Members allows for more detailed and candid conversations, this effort can alternatively be conducted as a work session to gain the collective input of the Town Council.

Meetings and Deliverables: Project Immersion meetings, agendas, presentations, and summaries (electronic)

1.3 Document Library & GIS Database Development

For background information and to assist in developing project graphics, Michael Baker will develop a comprehensive document library and a dedicated geodatabase. Necessary GIS data will be collected from the Town and appropriate agencies.

1.4 Existing Conditions Assessment Report

This task describes the work effort associated with preparing a background report that will be used to inform the development of decisions, goals, policies, exhibits and maps throughout the life of the project. This step is meant to take stock of existing reports, plans, social, natural, environmental and built resources, systems, and assets and convey their value as potential opportunities, constraints, or challenges.

Primary topics of this Existing Conditions Report will focus on two key aspects "Assessment of the Community" and "Assessment of the current General Plan". At a minimum, discussion of these key topics will be informed by the information collected in Task 1.3 and include analysis of key socio-demographic data and development trends along with future projections and assumptions relative to land use, density and intensity of growth. Specific topic areas relative to existing or anticipated needs associated with dark skies, harmonized commercial development, hazard mitigation and environmental protections will also be considered. All this information will be supplemented by other subjects identified as important by Town staff, elected officials, and stakeholders during the Project Immersion Summit.

Deliverable: Existing Conditions Assessment Report (Electronic)

ENGAGE: Visioning & Gathering Input

While techniques may ultimately vary to address ongoing or new community-based issues that may arise during the project process, we anticipate a community-wide public engagement process that would, at a minimum, encompass the following key efforts.

2.1 Community Outreach & Participation Plan

As part of the project scoping meeting (Task 1.1), our team will review and discuss the goals and objectives of the community involvement process with Town staff. We will then prepare and assist in the adoption of a Community Outreach & Participation Plan that will be tailored to Carefree's specific needs and strategic requirements as well as meet Arizona Revised Statute requirements for Council adoption.

Meetings and Deliverables: Community Outreach & Participation Plan (electronic), Town Council Public Hearing

2.2 Visual Identity

Michael Baker's graphic designers, in coordination with Town staff, will create a unique graphic format and project branding to create a recognizable identity for the project and garner enthusiasm and unity. This brand will then be used for all project products, including the website, meeting materials, and planning documents.

2.3 Commission & Council Coordination

Woven throughout the project process, and specifically detailed in the Outreach & Participation Plan (Task 2.1), there will be a series of work sessions with the Planning Commission and Town Council. Members of the Michael Baker Team will meet with the Planning Commission and Council at key project milestones to seek guidance, review findings and/or plans and to prepare for formal public hearings. This Task includes up to four (4) work sessions/briefings facilitated as shown on the project schedule with both the Planning Commission and Town Council.

Deliverables: Work session preparation, attendance and facilitation; Preparation of presentation materials.

2.4 Project Website & Digital Engagement

Public participation in today's world requires a flexible, organic, and far-reaching approach that is featured across multiple media types. Michael Baker will work with Town staff to identify content for an inviting, user-friendly website for residents to learn, receive updates and notices, and stay involved with the project. The website will ensure the project is transparent in the public's eye and include responses to frequently asked questions and serve as a repository for project documents. During the scoping process Michael Baker will coordinate with Town staff to define a preferred website hosting approach.

Online surveys using tools such as Social Pinpoint or SurveyMonkey will also be used to provide an opportunity for community members to guide and refine proposed plan content within their busy lives.

2.5 Community Workshops

The Michael Baker Team will prepare for and facilitate two (2) public workshops along with up to two (2) discussion hubs associated with the General Plan Update planning process. For each workshop and discussion hub, meeting announcements will be prepared in coordination with Town staff for advertising and distribution. All draft materials will be carefully reviewed with Town Staff prior to their dissemination.

The following is a conceptual format for each set of workshops which will be modified and refined based on further discussion with Town Staff upon selection.

Community Workshop #1 – Public Kick-off & Visioning Validation

As one of the first steps in the planning process, Michael Baker will facilitate a project kick-off and community vision/ goal setting workshop. This workshop will be conducted in a traditional in-person format and supported by a virtual option for residents who may not be able to or comfortable with participating in-person. The information gained as part of this workshop will help to refresh or amend the existing General Plan vision

statement and primary goals/objectives expressed in the current General Plan. A multi-media presentation and interactive exercises will be used to obtain feedback from the community.

Discussion Hubs

Discussion Hubs act like focus group workshops that are held to address specific issues where there is a diversity of perspectives within the Town. The goal of the Discussion Hub is to provide residents or stakeholders and elected officials both an opportunity to learn about and explore particular issues of interest in a deeper manner so as to identify common ground policies or actions that can be used to keep the overall General Plan Update process moving in a positive and unified direction. Michael Baker can coordinate the application of Discussion Hubs during the formal “scoping” process. Examples of topics that could be conducted as part of Discussion Hubs include: Economic Development, Water Resource Planning, Transportation trends or Sustainable Development practices.

Mobile Studios (shall be facilitated under Task 4.3)

Mobile studios act like pop-up workshops in a booth and can be held at popular community events and locations throughout the Town. The goal of the mobile studio is to engage as many Carefree residents as possible, educate people about the importance of the General Plan update, and collect community input on the project. During the course of the project Michael Baker will coordinate up to three (3) mobile studios to help reach those residents that may not frequently participate in more traditional public meeting settings.

Community Workshop #2 – Administrative General Plan Draft Review

Identical to Workshop #1, the Michael Baker Team will conduct a traditional in-person style meeting supported by a virtual option for the public review and comment of the Draft General Plan Update. The meeting will be utilized to present key aspects of the draft plan and Michael Baker Team members will engage the community in open dialogue to seek their final concurrence on the plan and identify any remaining and/or necessary changes that must occur prior to finalizing the General Plan Update.

Meetings and Deliverables: Two (2) Community Workshops, up to two (2) Discussion Hubs, and up to three (3) Mobile Studios. Baker will develop presentation material and produce all handouts and summaries for each meeting.

2.6 Outreach & Social Media

We will work with the Town to promote meetings, issues and opportunities for engagement and meeting notices via the Town’s existing Carefree Connection Newsletter and Twitter account or any other appropriate local association outlet accounts on Facebook, Nextdoor, and any other outlets as appropriate.

ENRICH: Development of General Plan 2040

3.1 Determination of the General Plan Organizational Structure

The “Traditional” general plan structure that is organized around individual elements (i.e. land use, transportation, water resources) has served communities well over the past several decades. However, today, new trends in the organization of general plans are utilizing a “Systems Approach”. This format utilizes more

common overarching themes (i.e. Sensitive Development, Connected Community, Vital Environment) to organize the general plan document and create stronger linkages between related topics. Using the knowledge gained in Phases I and II, Michael Baker will explore the benefits and disadvantages of these two General Plan organizational structures with Town staff and the Town Council to define a document format that best fits Carefree's near-term and long-term needs.

Meetings and Deliverables: Draft Organizational Structure.

3.2 Administrative General Plan Draft

This Task will predominately focus on redrafting the text from the 2030 General Plan, rather than a complete rewrite of the entire document or completion of comprehensive map/land use changes. Based on preliminary review of the 2030 General Plan, it is believed that much of the foundational content is applicable, but could simply benefit from strategic rephrasing, simplification and/or reorganization of Plan content. While the final format of the Plan will be determined as part of Task 3.1., the plan will at minimum address the elements as outlined in the Scope of Work section of the Town's Request for Proposals. These elements include: Land Use, Circulation, Open Space, Growth, Environmental, Cost of Development, Water Resources, Public Services and Facilities and Implementation. To assist in the draft review process, it is anticipated these elements will be drafted across three phases.

Meetings and Deliverables: Administrative General Plan Update Draft (electronic)

3.3 60-Day Public Review Draft

Following final direction from Town Staff, Commission and Council, Michael Baker will make all necessary revisions to the document in preparation for the state required 60-day public review period. This formal public review draft is intended for distribution to the general public as well as to other government agencies and stakeholders. Michael Baker will coordinate with Town staff for distribution of the 60-day review draft.

Meetings and Deliverables: 60-Day Public Review Draft (electronic)

ACHIEVE: Public Body Recommendation & Approval, Ratification, & Project Close Out

Task 4.1: Final Plan

With and through guidance from the Town Project Manager, the Michael Baker Team will make any final necessary changes derived from final comments generated during the formal 60-day review period to prepare the Public Hearing Final Draft of the General Plan Update for Planning Commission consideration and Town Council adoption. Along with this effort, an Executive Summary of the 2040 General Plan will also be prepared.

Task 4.2: Public Hearings - Consideration of the Final General Plan Update

As part of the final adoption process, the Michael Baker Team will lead or co-facilitate with Town staff, one Planning & Zoning Commission and one Town Council public hearing to review and discuss the project history and background of the General Plan Update process, description of key mapping components and policies as well as address any remaining issues and what the potential solution may be to those concerns. This Task includes up to three (3) work sessions and one (1) public hearing facilitated as shown on the project schedule with both the Planning Commission and Town Council.

Task 4.3: Owner Initiated Tasks

To give staff the flexibility to apply additional resources to strategically address unexpected requests or opportunities that arise during the General Plan Update process, this Task sets-aside funds to be used only as needed and only when specifically directed by staff in writing.

Task 4.4: Ratification Support

Michael Baker will collaborate with Town staff to provide technical assistance during the ratification process. This includes helping prepare required election material, coordinating with media information requests, providing "e-reminders" of the General Plan availability, and producing "did you know" tutorials that outline key aspects of the plan.

CLIENT ASSISTANCE

The consultant team will rely on Town of Carefree staff to provide the following assistance:

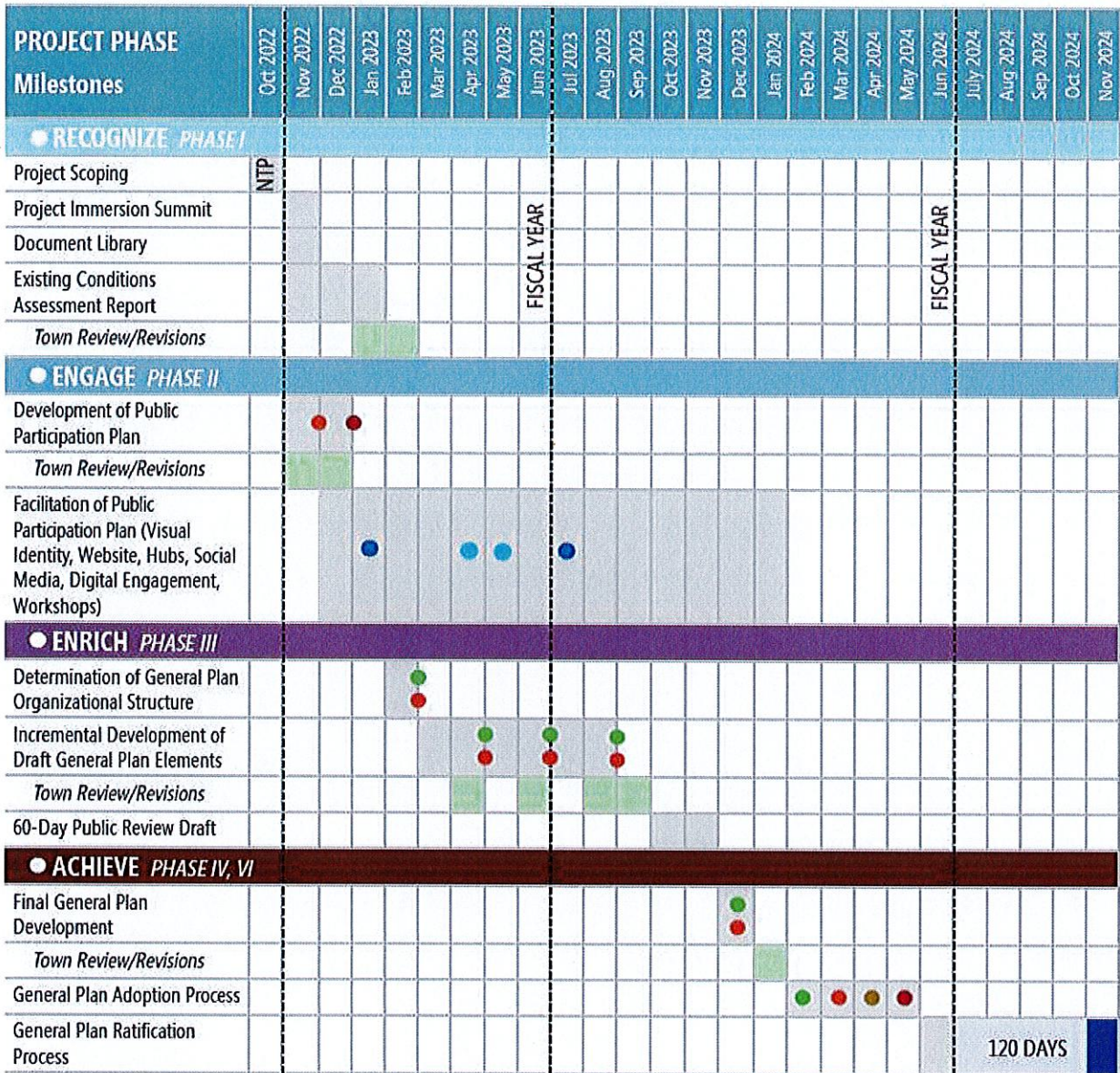
- Provide applicable plans, reports, documents and other materials requested electronically, internet link, or in hard copy format.
- Assist in planning and promoting for all community meetings by hosting and notifying participants.
- Distribute Survey information and link.
- Provide periodic project updates to the Town Council and Planning & Zoning Commission.
- Distribute work products and be the point of contact or funnel for all feedback.

PROJECT FEE

TOWN OF CAREFREE GENERAL PLAN UPDATE PROJECT BUDGET	PROJECT DIRECTOR	PROJECT MANAGER	POLICY PLANNER & PO	PLANNER & GIS	ANALYSIS & PO	TOTAL TASK HRS	TASK FEE
	\$250.00	\$230.00	\$120.00	\$120.00	\$90.00		
PHASE I - RECOGNIZE							\$24,620
TASK 1.1: SCOPING MEETING (& ONGOING PROJECT COORDINATION)	2	20				22	\$5,100
TASK 1.2: PROJECT IMMERSION	2	10	16		10	38	\$5,620
TASK 1.3: DOCUMENT LIBRARY & GIS DATA							\$0
TASK 1.4: EXISTING CONDITIONS ASSESSMENT REPORT	1	15	15	40	40	111	\$13,900
PHASE II - ENGAGE							\$46,140
TASK 2.1: COMMUNITY OUTREACH & PARTICIPATION PLAN	1	12	8		8	29	\$4,690
TASK 2.2: VISUAL IDENTITY		1		15		16	\$2,030
TASK 2.3: COMMISSION & COUNCIL COORD. (INCLUDES 4 COM. & TC BRIEFINGS EA.)		35	20	20	20	95	\$14,650
TASK 2.4: PROJECT WEBSITE & DIGITAL ENG.		20			80	100	\$11,800
TASK 2.5: COMMUNITY WORKSHOPS/DISCUSSION HUBS (INCLUDES 2 COM. WKSP & 2 DIS. HUBS)		20	20	25	25	90	\$12,250
TASK 2.6: SOCIAL MEDIA					8	8	\$720
PHASE III - ENRICH							\$38,620
TASK 3.1: GENERAL PLAN ORG. STRUCTURE		8		20	10	38	\$5,140
TASK 3.2: ADMINISTRATIVE GP DRAFT	4	40	40	80	80	244	\$31,800
TASK 3.3: 60-DAY PUBLIC REVIEW DRAFT			8		8	16	\$1,680

PHASE IV, VI - ACHIEVE							\$18,030
TASK 4.1: FINAL PLAN	2	5		10	15	32	\$4,200
TASK 4.2: PUBLIC HEARINGS		12		8		20	\$3,720
TASK 4.3: OWNER INITIATED TASKS		9		15	15	39	\$5,220
TASK 4.4: RATIFICATION SUPPORT		9		10	18	37	\$4,890
TOTAL PROJECT HOURS	12	216	127	243	337	935	
SUBTOTAL							\$127,410
REIMBURSABLE (MILEAGE, MEALS, REPROGRAPHICS, PUBLIC MEETING MATERIALS)							\$2,500
LUMP SUM							\$129,910

PROJECT SCHEDULE



- Discussion Hubs
- Planning Commission Work Session/Briefing
- Council Work Session/Briefing
- Community Workshop
- Planning Commission Public Hearing
- Council Public Hearing

ELECTION