

# TOWN OF ORO VALLEY

## NOTICE OF REQUEST FOR PROPOSALS #13034

Notice is hereby given that the Town of Oro Valley is conducting a competitive proposal process with the intent of contracting for communication, event planning, facilitation and survey services. All inquiries for information regarding this solicitation should be directed to:

Bayer Vella, Conservation & Sustainability Administrator  
Town of Oro Valley  
520.229.4810  
[bvella@orovalleyaz.gov](mailto:bvella@orovalleyaz.gov)

### **Due Date**

Sealed Proposals will be received until Friday June 14, 2013 at 4:00 pm local AZ time.

Proposals should be mailed or hand delivered to:

Town of Oro Valley, Town Clerk  
11000 N. LaCañada Drive  
Oro Valley, Arizona 85737

### **Pre-Proposal Conference**

May 30, 2013 at 11:00 am  
Town of Oro Valley Administration  
Kachina Conference Room  
11000 N. La Canada Drive  
Oro Valley, AZ 85737

### **Description**

A copy of this solicitation and possible future addenda may be obtained from our Internet site at: [www.orovalleyaz.gov/town/departments/finance/procurement](http://www.orovalleyaz.gov/town/departments/finance/procurement). Internet access is available at the Oro Valley Public Library as well as all Tucson-Pima Public Libraries.

Any interested bidder without Internet access may obtain a copy of this solicitation by calling (520) 229.4722, or a copy may be picked up during regular business hours at 11000 N. La Canada Drive, Oro Valley, Arizona 85737.

**The Town of Oro Valley takes no responsibility for informing recipients of changes to the original solicitation document.** It is the Offeror's responsibility to obtain a copy of any addenda relevant to this solicitation. Failure to submit addenda with the solicitation response may be grounds for deeming a bid non-responsive.

Post Date: May 16, 2013  
Publishing Dates: May 16 and 23, 2013

REQ: Town of Oro Valley  
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## **Request for Proposals #13034**

For

Public Participation Consulting Services  
for General Plan Update

### **Due Date**

*June 14, 2013 at 4:00pm Local AZ time*

### **Pre-Proposal Conference**

*May 30, 2013, 11:00 am  
Kachina Conference Room  
Oro Valley Town Hall  
11000 N. La Canada Drive  
Oro Valley, AZ*

**Development & Infrastructure Services Department**  
Town of Oro Valley

## I. INTRODUCTION

The Town of Oro Valley is beginning preparations to update its General Plan that will guide and inform critical decisions about the Town's future. This important effort, envisioned to be inclusive and community driven and supported, will provide guidance for public policy development that both defines the character of Oro Valley and sustains its functioning.

Our aim is to publicly kick-off the General Plan update August/September of this year. Staff has initiated the process of laying the groundwork to mobilize Town and community resources. A Public Participation Plan (PPP), as required by Arizona Growing Smarter Act., has been formally approved.

The Town seeks consultant services to develop and implement communication strategies, event planning exercises and surveys as outlined in the Public Participation Plan. Facilitation services for select events are also requested.

## II. BACKGROUND

The General Plan update will replace the Town's current one (Focus 2020) that was adopted and ratified by voters in 2005. Since then, a significant increase in population has resulted in changes to the Town's demographic profile. This General Plan update presents the Town with a unique opportunity to engage the Town's residents and stakeholders in a dialogue to establish priorities and further define and guide the development of their community. Experience has taught us that only when people of all walks of life come together to discuss, debate and listen to one another do communities gain a larger understanding of who they are and how they want to move forward.

The General Plan will be primarily conducted in-house by Town staff. We will create the plan maps, gather plans and studies, perform data analysis, facilitate the majority of meetings and draft the text of the plan. To date, a Public Participation Plan has been formally approved by the Oro Valley Town Council (see **Attachment #1**),

In keeping with the Public Participation Plan's guiding principles, communication methods and techniques are designed to reach a broad spectrum of the community and educate participants about the process, garner meaningful input and, ultimately, obtain voter ratification. Engaging the community will provide them with a sense of ownership for the General Plan and build trust in the Town, resulting in quality participation and greater likelihood of positive voter turnout.

To provide ample opportunity to residents and stakeholders for participation, a variety of communication methods and techniques will be employed. By ensuring opportunities are welcoming and convenient, we will expand the pool of participants. To this end, social media tools and small gatherings in convenient locations are key outreach methods. This approach will be supplemented with traditional community outreach, such as community open houses.

### III. SCOPE OF SERVICES

All aspects of the General Plan, including the name, must be transformed from an esoteric technical planning tool into an effort for residents and stakeholders to further develop Oro Valley's high quality-of-life. The Town seeks consultant expertise to achieve this objective.

#### Detailed Services:

##### A. Develop Project Identity & Communications Strategies

The first step will be to create a project identity, including an appealing name, logo, tagline and core messaging pertinent to each phase of the project. All General Plan materials will carry this "project look." Materials will also be clear, easy-to-understand, engaging and show how the General Plan directly relates to the quality of participants' lives in Oro Valley and why it should matter to them.

A comprehensive communication strategy is needed for each primary phase of the project. The Public Participation Plan identifies the need to address the following:

- Communication Strategy #1: This is important!
- Communication Strategy #2: Participate!
- Communication Strategy #3: Vote!

The consultant will test project identity concepts and communication strategies through a citizen review committee and a Town staff review team. Strategies must be specifically targeted to reach Oro Valley's broad demographic with a special emphasis on reaching families and youth, who are generally not well represented in such efforts.

The project Identity and core messaging will be used with a broad array of mediums ranging from print, newspaper, meeting presentations, flyers, postcards, Town website, Twitter and Facebook. The Public Participation Plan further details key objectives and needs.

The Town will also utilize a Speakers Bureau consisting of Town residents. Assistance is needed in training speakers, developing "presentations in a box" and creating a traveling mobile display tailored for use by specific audiences (HOA's, community groups, neighborhood gatherings etc.)

##### B. Event Planning

Public and stakeholder meetings, focus groups, small group gatherings and other activities will be organized to produce results. Activities will be designed so that participants have the time to understand different points of view and resolve issues that may arise. Participants will be encouraged to develop a common sense of purpose and definitions of challenges faced by the community.

The Town seeks technical assistance in organizing public participation exercises for community-wide events. Community-wide events may include a Town Hall meeting, State

of the Town address, Town of Oro Valley Volunteer Dinner (event honoring all boards, commissions, volunteers etc.)

### **C. Design and Implement Community Surveys**

Assistance is needed to design, implement, tabulate and report survey results. The following survey types are envisioned.

- Statistically valid phone surveys (beginning and end of project)
- Survey published in the NW Explorer (beginning of project)
- Event surveys (periodic)
- Set-up and design surveys using MindMixer program (periodic)

Each will be deployed at specific project phases to better inform decision making.

### **D. Facilitation Services**

The Town seeks facilitation services primarily for select community outreach events. Typical events include annual Town gatherings, open houses and select committee meetings.

All tasks are critical to project success. The table on the following page includes a comprehensive list of public participation methods and techniques. Columns requiring specific consultant services are highlighted in grey.

Regarding the use of the table on the following page, please note the following:

- a. The list does not include all services requested as part of this Request for Proposals.
- b. The figures only represent general estimates. Offerors must accurately judge the number of hours required.
- c. Consultant must include ample time for scheduling and strategy meetings with staff, etc.

### **E. Editing and Document Publishing**

Additional services are needed to edit draft policies, design graphics, identify appropriate images, and publish the General Plan. The consultant will be responsible for refining initial drafts and creating a refined document complete with graphics and images. The document must be designed for publishing in both electronic and paper formats.

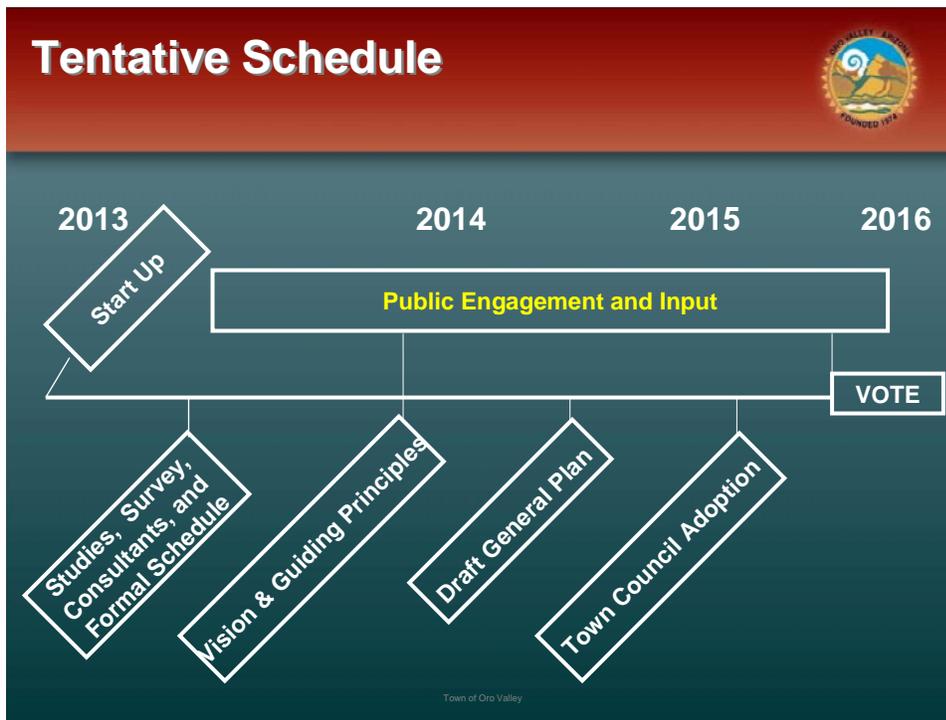
<b>Public Participation Plan</b>		<b>Estimated Hours (Please note, hours are intended as a guide)</b>										
(2.5 year budget)		#	<b>Consultant or New Contract Employees</b>				<b>Current Oro Valley Staff</b>					
<b>Methods</b>			Contract	Contract	Contract	Contract	PPM	PM	Planner	GIS	Clerical	Comm
			Event Plng	Planner	Clerical	Marketing						
<b>Targeted Participation</b>												
<b>Committees</b>												
Environment Committee	8	0	136	66		1	14	120	12	24	5	9
Community Committee	8	0	136	66		1	14	120	12	24	5	9
Development Committee	10	0	168	82		1	17	148	15	30	6	11
Joint Meeting of Committee Representatives	6	0	104	50		1	11	92	9	18	4	7
<b>Small Event Meetings</b>												
Leadership Interviews (20 persons per set)	40	0	140	60		20	40	80	0	0	40	0
One on Ones with Stakeholders	40	0	140	60		20	40	80	0	0	40	0
HOA Meeting Participation Series	15	0	240	113		15	38	150	23	38	8	8
Community Conversation on Your Corner	14	0	224	105		14	35	140	21	35	7	7
Town Department Review Meetings	25		25				0	13		0	0	0
Stakeholder Mtgs. - Gov. & Schools	2	0	32	15		2	5	20	3	5	1	1
Stakeholder Mtgs. - Community Groups	5	0	80	38		5	13	50	8	13	3	3
Stakeholder Mtgs - AZ State Land Dept	6	0	96	45		6	15	60	9	15	3	3
Stakeholder Mtgs - Developers/Landowners	5	0	80	38		5	13	50	8	13	3	3
Boards & Commissions Workshops	14	0	161	91		0	35	133	0	14	0	0
PZ Commission Study Session	4	0	46	26		0	10	38	0	4	0	0
Focus Group on Land Use	1	0	16	8		1	3	10	2	3	1	1
Focus Group on Economic Development	1	0	16	8		1	3	10	2	3	1	1
Youth Values Institute	1	0	16	8		1	3	10	2	3	1	1
Neighborhood Gatherings	7	0	112	53		7	18	70	11	18	4	4
<b>Community Participation</b>												
<b>Large Event Meetings</b>												
Town Hall I: Project Kick-off & Future Search	1	36	52	36		22	23	46	12	13	19	18
Open House	2	28	96	72		36	46	88	20	26	30	32
Public Hearings	4	0	116	36		40	48	116	0	12	20	20
<b>Community Events</b>												
Annual HOA forum	2	4	48	38		10	20	46	12	10	8	8
State of the Town	2	36	48	38		10	20	46	12	10	8	8
School Functions	2	4	48	38		10	20	46	12	10	8	8
TOV Volunteer Dinner	2	4	48	38		10	20	46	12	10	8	8
<b>Web and Social Media (2 year term)</b>												
Facebook		0	110	0		12	4	55	0	0	0	55
Twitter		0	26	0		6	0	13	0	0	0	55
Orovalleyaz.gov		0	55	0		12	4	55	0	0	0	55
Mindmixer (software and initial setup)		0	220	0		15	10	220	0	0	0	55
<b>Surveys</b>												
Mindmixer (design of surveys)	12	0	2	0		6	1	2	0	0	0	1
Survey Published in NW Explorer	1	0	8	0		8	1	8	0	0	0	4
Informal Event Surveys & Comment forms	8	0	40				8	24				8
Phone Surveys	2											
<b>Local News Media</b>												
NW Explorer - Advertizing Space	20	0	40	20		120	20	80	0	0	0	20
NW Explorer - Quarterly Article	6	0	24	0		24	6	12	0	0	0	6
Vista Articles	6	0	24	0		24	6	12	0	0	0	6
News Release	8	0	8	0		0	8	16	0	0	0	16
Letters to Editor Response	20	0	20	0		0	20	40	0	0	0	40
Articles in HOA Newsletters	25	0	25	0		0	25	50	0	0	0	50
<b>Water Bill Inserts</b>												
Postcards to Advertize Website & Mindmixer	3	0	3	0		6	2	3	0	0	0	1
Voter Education Postcard	1	0	3	0		2	1	1	0	0	0	1
<b>Ballot Vote</b>												
	1	0	0	0		6	4	6	0	0	0	2
<b>Tools &amp; Techniques</b>												
Communication Strategy #1: This is important!		0	2	0		20	2	2	0	0	0	2
Communication Strategy #2: Participate!		0	2	0		20	2	2	0	0	0	2
Communication Strategy #3: Vote!		0	2	0		20	2	2	0	0	0	2
Community Speakers Bureau		0	40	20		6	4	40	0	0	0	0
Leadership Bureau		0	40	10		0	4	60	0	0	0	0
Traveling Mobile Display			6			8		6				2
Technical Reports (baseline information)		0	40	8		0	8	40	40	0	0	0
<b>Total</b>		<b>112</b>	<b>3164</b>	<b>1283</b>		<b>554</b>	<b>662</b>	<b>2577</b>	<b>254</b>	<b>348</b>	<b>228</b>	<b>548</b>

## V. PROJECT SCHEDULE

A formal project schedule is currently being developed. Because an effective communications strategy is paramount to this effort, the consultant will be asked to review and help refine.

The Town is considering an intensive effort to seek voter ratification in November of 2014 **or** extending the process until 2016. As such, applicants must demonstrate capacity to accommodate either approach.

The diagram below includes a broad overview of key steps in the process.



#### **IV. Financial Considerations**

- A.** For services rendered under the resulting contract, the Town shall pay the Consultant based on the amounts as agreed upon between the Consultant and the Town which include overhead, profit and all other costs associated with performing services under the Contract. If the Scope of Services or the Project budget increases or decreases significantly, the amounts of compensation shall be revised in accordance with Town procedures.
- B.** Progress payments will be made consistent with Town procedures. The Consultant shall prepare Pay Requests for the amount representing the actual value of the services rendered and submit these forms to the Project Manager for approval and processing.
- C.** Consultants shall not be reimbursed for normal business use mileage within Pima County. Work requiring travel outside of Pima County shall include reimbursement for travel and per diem expenses paid per current Town allowances. Vehicle usage, lodging, and per diem expenses for out of town consultants must be identified and approved in the consultant's cost proposal.
- D.** Consultant shall consider normal computer usage for daily activities as a part of overhead. Computer time for complex graphics, computer dedicated to field activities or computer time for numerical modeling as needed for a specific task must be identified and approved in the consultant's price proposal.
- E.** Reimbursable Expenses (which are all not-to-exceed allowances) shall be paid at cost to consultant and shall include no markup. Pay Requests shall be submitted with documentation of incurred expenses for reimbursement as approved expenses are incurred but not to exceed the amount agreed upon by the Consultant and the Town.

## INSTRUCTIONS TO OFFERORS

### 1. DEFINITION OF KEY WORDS USED IN THE SOLICITATION:

For purposes of this solicitation and subsequent contract, the following definitions shall apply:

**Addendum:** A document issued by the Town that has the effect of modifying, clarifying, adding to or deleting specifications, scope, and terms or conditions of the solicitation.

**Amendment:** A document issued by the Town that modifies the specifications, scope or terms and conditions of a contract.

**Contract:** The legal agreement executed between the Town and the Contractor/Consultant. The Contract shall include this RFP document incorporated herein by reference, all terms, conditions, specifications, scope of work, addenda, amendments, the Contractor's offer and negotiated items as accepted by the Town.

**Contractor/Consultant:** The individual, partnership, or corporation who, as a result of the competitive solicitation process, is awarded a contract by the Town.

**Contract Representative:** The Town employee or employees who have specifically been designated to act as a contact person or persons to the Contractor, and is responsible for monitoring and overseeing the Contractor's performance under this Contract.

**Procurement Agent:** The central contracting authority for the Town.

**May:** Indicates something that is not mandatory but permissible.

**Offeror:** The individual, partnership, or corporation who submits a proposal or offer in response to a solicitation.

**Shall, Will, Must:** Indicates a mandatory requirement. Failure to meet these mandatory requirements, if they constitute a substantive requirement, may, at the Town's sole discretion, result in the rejection of a proposal as non-responsive.

**Should:** Indicates something that is recommended but not mandatory. If the Offeror fails to provide recommended information, the Town may, at its sole option, ask the Offeror to provide the information or evaluate the proposal without the information.

**Town:** The Town of Oro Valley, Arizona.

**2. PRE-PROPOSAL CONFERENCE:** If scheduled, the date and time of a Pre-Proposal conference is indicated on the cover page of this document. Attendance at this conference is not mandatory. The purpose of this conference will be to clarify the contents of this Request for Proposal in order to prevent any misunderstanding of the Town's position. Any doubt as to the requirements of this Request for Proposal or any apparent omission or discrepancy should be presented to the Town at this conference. The Town will then determine the appropriate action necessary, if any, and may issue a written addendum to the Request for Proposal. Oral statements or instructions will not constitute an addendum to this Request for Proposal.

**3. INQUIRIES:** Any question related to the solicitation shall be directed to the contact person whose name appears on the cover page. The contact person may require any and all questions be submitted in writing. Offerors are encouraged to submit written questions via electronic mail or facsimile, at least five days prior to the solicitation due date. Any correspondence related to a solicitation should refer to the appropriate

solicitation number, page and paragraph number. An envelope containing questions should be identified as such, otherwise it may not be opened until after the official proposal due date and time. Oral interpretations or clarifications will be without legal effect. Only questions answered by a formal written addendum to the solicitation will be binding.

- 4. SOLICITATION ADDENDUM:** The Offeror shall acknowledge receipt of a solicitation addendum by signing and returning the document by the specified due date and time. The Request for Proposals with Information for Respondents, Supplemental Project Information, any future Addenda may be obtained from the Town's website: <http://www.orovalleyaz.gov/Procurement/>. **It is the sole responsibility of the Respondent to obtain, review, and acknowledge any addenda that may be published on the Town's website.**
  
- 5. FAMILIARIZATION OF SCOPE OF WORK:** Before submitting a response, each offeror shall familiarize itself with the Scope of Work, laws, regulations and other factors affecting contract performance. The Offeror shall be responsible for fully understanding the requirements of the subsequent Contract and otherwise satisfy itself as to the expense and difficulties accompanying the fulfillment of contract requirements. The submission of a response will constitute a representation of compliance by the Offeror. There will be no subsequent financial adjustment, other than that provided by the subsequent Contract, for lack of such familiarization.
  
- 6. PREPARATION OF RESPONSE:**
  - A. All proposals shall be on the forms provided in this solicitation package. It is permissible to copy these forms as required. Facsimiles or electronic mail proposals shall not be considered.
  - B. The Offer page, Price Page if applicable and any solicitation addenda must be signed and returned with the response.
  - C. The Offer page shall be signed by a person authorized to submit an offer. An authorized signature on the Offer page, Proposal addenda, or cover letter accompanying the proposal documents shall constitute an offer to sell the good and/or service specified herein.
  - D. In case of error in the extension of prices in the proposal, unit price shall govern when applicable.
  - E. Periods of time, stated as a number of days, shall be in calendar days unless otherwise specified.
  - F. It is the responsibility of all offerors to examine the entire solicitation package and seek clarification of any requirement that may not be clear and to check all responses for accuracy before submitting a response. Negligence in preparing a response confers no right of withdrawal after due date and time.
  - H. The Town shall not reimburse the cost of developing, presenting, submitting or providing any response to this solicitation.
  
- 7. TAXES:** Sales taxes shall not be included in the price information.
  
- 8. SUBMITTAL FORMAT:** **An original and 5 copies (6 total) of each response** should be submitted on the forms and in the format specified in the solicitation. In addition, an

electronic copy on CD or USB drive must be submitted. The material should be in sequence and related to the solicitation. **The sections of the submittal should be tabbed, clearly identifiable and should include a minimum of the following sections: the completed Offer Page, all signed addenda and the Offeror's response to the Evaluation Criteria including the completed Price Page (if applicable).** Failure to include the requested information may have a negative impact on the evaluation of the submittal.

- 9. EXCEPTIONS TO CONTRACT PROVISIONS:** A response to any solicitation is an offer to contract with the Town based upon the contract provisions contained in the Town's Standard Contract (attached), the specifications, scope of work and any special terms and conditions. Offerors who wish to propose modifications to the contract provisions must clearly identify the proposed deviations and any proposed substitute language. The provisions of the contract cannot be modified without the express written approval of the Procurement Agent. If a proposal or offer is returned with modifications to the contract provisions that are not expressly approved in writing by the Procurement Agent, the contract provisions contained in the Town's solicitation document and standard contract shall prevail. **NO EXCEPTIONS OR REVISIONS TO THE INDEMNIFICATION PROVISION OF THE STANDARD CONTRACT SHALL BE CONSIDERED.**
- 10. PUBLIC RECORD:** All proposals submitted in response to this solicitation shall become the property of the Town and shall become a matter of public record available for review subsequent to the award notification.
- 11. CONFIDENTIAL INFORMATION:** The Town is obligated to abide by all public information laws. If an Offeror believes that any portion of a proposal, offer, specification, or correspondence contains information that should be withheld, a statement advising the Procurement Agent of this fact should accompany the submission and the information shall be so identified wherever it appears. The Town shall review all requests for confidentiality and may provide a written determination to designate specified documents confidential or the request may be denied. Price is not confidential and will not be withheld. If the confidential request is denied, such information shall be disclosed as public information, unless the offeror submits a formal written objection.
- 12. CERTIFICATION:** By signature on the Offer page, solicitation addenda, or cover letter accompanying the submittal documents, Offeror certifies:
- A. The submission of the offer did not involve collusion or other anti-competitive practices.
  - B. The Offeror shall not discriminate against any employee or applicant for employment in violation of Federal or State law.
  - C. The Offeror has not given, offered to give, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, meal or service to a public servant in connection with the submitted offer.
  - D. The Offeror hereby certifies that the individual signing the submittal is an authorized agent for the Offeror and has the authority to bind the Offeror to the Contract.

- 13. RESPONSES TO THIS SOLICITATION:** In order to be considered, the Offeror must complete and submit its response to the Town Clerk at 11000 N. LaCanada Dr., Oro Valley, AZ 85737, prior to or at the exact date and time indicated on the Notice page. The Offeror's response shall be submitted in a sealed envelope. The words "SEALED PROPOSAL" with the REQUEST FOR PROPOSAL TITLE, REQUEST FOR PROPOSAL NUMBER, PROPOSAL DUE DATE AND TIME and OFFEROR'S NAME AND ADDRESS shall be written on the envelope.
- 14. LATE PROPOSALS:** Late proposals will be rejected and returned unopened.
- 15. OFFER AND ACCEPTANCE PERIOD:** In order to allow for an adequate evaluation, the Town requires an offer in response to this solicitation to be valid and irrevocable for one hundred twenty (120) days after the proposal due date and time.
- 16. WITHDRAWAL OF OFFER:** At any time prior to the specified solicitation due date and time, an offeror may formally withdraw the offer by a written letter, facsimile or electronic mail from the Offeror or a designated representative. Telephonic or oral withdrawals shall not be considered.
- 17. DISCUSSIONS:** The Town reserves the right to conduct discussions with offerors for the purpose of eliminating minor irregularities, informalities, or apparent clerical mistakes in the proposal in order to clarify an offer and assure full understanding of, and responsiveness to, solicitation requirements.
- 18. CONTRACT NEGOTIATIONS:** Negotiations may be conducted with responsible offeror(s) for the purpose of altering or otherwise changing the conditions, terms and price of the proposed contract unless prohibited. Offerors shall be accorded fair and equal treatment in conducting negotiations and there shall be no disclosure of any information derived from proposals submitted by competing offerors.
- 19. UPON NOTICE OF INTENT TO AWARD:** The apparent successful offeror shall sign and file with the Town, within ten (10) days after Notice of Intent to Award, all documents necessary to the successful execution of the Contract.
- 20. AWARD OF CONTRACT:** Notwithstanding any other provision of the solicitation, the Town reserves the right to:
- (1) waive any immaterial defect or informality; or
  - (2) reject any or all proposals, or portions thereof; or
  - (3) reissue the solicitation.

## EVALUATION REQUIREMENTS

### I. EVALUATION CRITERIA – (listed in relative order of importance)

- A. Qualifications, Experience and Expertise
- B. Method of Approach
- C. Price Proposal

### II. REQUIREMENTS SPECIFIC TO EVALUATION CRITERIA: The narrative portion and the materials presented in response to this Request for Proposal should be submitted in the same order as requested and must contain, at a minimum, the following:

#### A. QUALIFICATIONS, EXPERIENCE AND EXPERTISE

1. A brief history of the Offeror's firm, including how long the Offeror have been in business performing services as requested in the Scope of Work.
2. A list of specific qualifications the Offeror, staff or subconsultant has in supplying the services listed in this proposal, including any applicable professional designations, certifications or licenses, etc. Offeror shall list the key personnel that will perform the functions of each proposed service or task. Resumes of key personnel and subconsultant (if applicable) shall be submitted as part of the proposal.
3. A list of at least three (3) previous and current contracts, which are considered identical or similar to the Scope of Work herein. For each client listed, please include the name and phone number of a reference who is able to comment on the related experience.
4. A list of subconsultant (if applicable), and their respective qualifications, to be used in performing the services requested. The Town reserves the right to approve or deny proposed subcontractors.
5. Demonstrated expertise in developing communication strategies to reach a broad demographic spectrum with an emphasis on connecting with under-represented residents such as families and youth.

#### B. METHOD OF APPROACH

Offeror shall prepare a detailed Method of Approach, which indicates the service proposed to be performed by the Offeror. This should address in depth, how Offeror plans to meet the requirements of the Scope of Services of the RFP. The method and approach should be addressed in a manner that reflects understanding and commitment to providing services as needed in a professional and timely manner.

**C. PRICE PROPOSAL**

The fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance. Fees shall be broken down by individual task. In addition, offeror shall provide billing rates for all individuals / disciplines included in the price proposal. These billing rates shall be used to adjust the fee based on any additional or decreased services as requested by the Town.

**III. GENERAL****A. Shortlist:**

The Town reserves the right to shortlist the offerors on all of the stated criteria. However, the Town may determine that shortlisting is not necessary.

**B. Interviews:**

The Town reserves the right to conduct interviews with some or all of the offerors at any point during the evaluation process. However, the Town may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating the stated criteria. The Town shall not reimburse the offeror for the costs associated with the interview process.

**C. Additional Investigations:**

The Town reserves the right to make such additional investigations as it deems necessary to establish the competence and financial stability of any offeror submitting a proposal.

**D. Prior Experience:**

Experiences with the Town and entities that evaluation committee members represent may be taken into consideration when evaluating qualifications and experience.

## SPECIAL TERMS AND CONDITIONS

### 1. INSURANCE

The Consultant agrees to obtain insurance coverage of the types and amounts required consistent with the coverage limits shown below.

<u>Coverage Afforded</u>	<u>Limits of Liability</u>
Worker's Compensation Employer's Liability	Statute \$100,000
Commercial General Liability Insurance (including blanket contractual and premises/operations)	\$1,000,000 - Bodily Injury Combined Single Limit \$100,000 Property Damage
Comprehensive Automobile Liability (includes contractor's owned, hired, or non-owned vehicles, assigned to or used in performance of the work)	\$1,000,000 – Bodily Injury and Property Combined Single Limit Each Occurrence

The Consultant shall provide satisfactory certificates on the required insurance coverage before beginning work. All policies shall contain an endorsement providing that written notice be given to the Town at least thirty (30) calendar days prior to termination, cancellation or reduction in coverage policy. Insurance policies shall remain in force until all work has been completed and the completed project has successfully fulfilled its warranty period. If a policy does expire during the life of the Contract, a renewal certificate of the required coverage must be sent to the Town of Oro Valley not less than five (5) workdays prior to expiration date. Each certificate shall include project description, project number and the signed acknowledgement of the insurance company.

The Town of Oro Valley shall be included as an additional insured **and endorsement provided** on all policies except Worker's Compensation. Policies for General, Automobile, and Excess Liability are primary over any insurance available to the Town and as to any claims resulting from the Contract, it being the intention of the parties that the insurance policies so effected shall protect both parties and be primary coverage for any and all losses covered by the described insurance.

In regard to General, Automobile, and Excess Liability, the Consultant agrees to indemnify, defend and save harmless the Town of Oro Valley, its Mayor and Council, appointed boards and commissions, officials, officers, employees, individually and collectively from all losses, claims, suits, actions, payments and judgments, demands, expenses, attorney's fees, defense costs, or actions of any kind and nature resulting from personal injury to any person, including employees of the Consultant or any subcontractor employed by the Consultant (including bodily injury and death) or damages to any property, arising or alleged to have arisen out of the negligent performance of the Consultant for the work to be performed hereunder,

except any injury or damages arising out of the sole negligence of the Town, its officers, agents or employees. The amount and type of insurance coverage requirements set forth in the Contract will in no way be construed as limiting the scope of indemnity in this paragraph.

**2. KEY PERSONNEL**

The Consultant must provide an adequate staff of qualified and experienced personnel to provide services under the contract. The Consultant agrees that, once assigned to work under this contract, key personnel shall not be removed or replaced without written notice to the Town. If key personnel are not available to work under this contract for a continuous period exceeding thirty (30) calendar days, or are expected to devote substantially less effort to the work than initially anticipated, the Consultant shall immediately notify the Town, and shall, subject to the concurrence of the Town, replace such personnel of substantially equal ability and qualifications. The Town reserves the right to require replacement of assigned personnel when this is deemed to be in the Town's best interest. Upon such notice, the Consultant **shall promptly assign a new appropriately qualified and experienced employee.**

## **STANDARD TERMS AND CONDITIONS**

### **SECTION I – DESCRIPTION OF PROJECT / SCOPE OF WORK**

Services to be rendered under this agreement shall be negotiated and agreed to by the Consultant and the Town prior to issuance of Notice to Proceed. The detailed list of services and any required deliverables and or milestones shall be documented in the resulting contract. Any changes to the scope shall be authorized in writing by the Town in accordance with Section VIII prior to services being rendered.

### **SECTION II – PAYMENT SCHEDULE**

The negotiated fee process shall be utilized for this Contract. For services rendered under this agreement, the Consultant shall be paid in accordance with the negotiated fee schedule. Payment shall be made monthly on the basis of progress reports. Consultant must provide a clear, detailed invoice reflecting items being billed for, a summary sheet showing percentage of work completed to date, amount/percent billed to date and current status of all tasks within the project with backup support documentation. Work schedule updates will be included in the monthly progress payment reports.

### **SECTION III – PERIOD OF SERVICE**

Following receipt of a Notice to Proceed with the work, the Consultant shall complete all services rendered under this agreement within the negotiated number of consecutive calendar days after Notice to Proceed is issued by the Town. In the event delays are experienced beyond the control of the Consultant, the completion date may be extended by mutual written agreement between the Town and the Consultant.

### **SECTION IV – APPROVALS**

All work shall be subject to approval by the designated Town Project Manager or designee.

Consultant agrees to exercise the skill and care which would be exercised by professionals performing similar services at the time and in the locality. If failure to meet these standards results in faulty work, Consultant shall undertake at its own expense the corrective adjustments or modifications.

### **SECTION V – INDEMNIFICATION**

The Consultant agrees to indemnify, defend, and save harmless the Town, its Mayor and Council, appointed boards and commissions, officials, officers and employees individually and collectively from all losses, claims, suits, demands, expenses, subrogations, attorney's fees or actions of any kind and nature arising out of the Consultant's negligence or any subcontractor employed by the Consultant including bodily injury and death, damages to any property or any other losses, claims, suits, demands and/or expenses arising or alleged to have arisen out of the work performed, except any injury or damages arising out of the sole negligence of the Town, its officers, agents or employees. The amount and type of insurance coverage requirements set forth in Section VII will in no way be construed as limiting the scope of indemnity in this paragraph.

### **SECTION VI – REPORTING**

Written monthly reports, together with updated work schedules, will be made by the Consultant in the format prescribed by the Town. These reports will be delivered to the Town no later than the fifth day of each month. When requested by the Town, the Consultant will attend Council meetings and provide finished documents including correspondence, supporting charts, graphs, drawings and colored slides for Council action.

### **SECTION VII – INSURANCE**

Proof of insurance as detailed in the Special Terms and Conditions shall be required prior to contract execution.

### **SECTION VIII – AMENDMENTS**

Whenever a change in the scope of work is determined to be necessary, the work will be performed in accordance with the Contract provided. Before a change in the scope of work is implemented, an amendment shall be executed by the Town and the Consultant. Additions to, modifications of or deletions from the project may be made and the compensation to be paid to the Consultant may be adjusted accordingly by mutual written agreement of the contracting parties. It is agreed that no claim for extra work by the Consultant will be allowed by the Town except as provided, nor shall the Consultant do any work not covered by this Contract unless the work is authorized through an amendment and signed by both parties **PRIOR** to starting any additional work.

TIME IS OF THE ESSENCE for this Contract. When the Consultant submits a request for additional time for which work must be completed in a contract, justification outlining the reason for applying for the extension must be provided and a date the work **will** be completed. If the extension is agreed to and signed by the Town and the Consultant, it binds the Consultant to complete the work by the extended date designated in the amendment unless the delay in completion of the work by the Consultant results from an unforeseeable cause beyond the control and without the fault or negligence of the Consultant. It is agreed the Town's only liability for delay from any cause shall be limited to granting a time extension to the Consultant. There is no other obligation, expressed or implied, on part of the Town to the Consultant for delay from any cause.

### **SECTION IX – TERMINATION**

This Contract may be terminated at any time by mutual written consent, or by the Town, with or without cause, upon giving thirty (30) days written notice. If this Contract is terminated, the Town shall be liable only for payment for services rendered and accepted by the Town before the effective date of termination.

The Town reserves the right to terminate in whole or any part of this Contract due to the failure of the Consultant to carry out any term or condition of the Contract. The Town will issue a written notice of default to the Consultant for failing to perform the stipulations, conditions or services/specifications required in this Contract. The Consultant shall have 5 days from receipt of the notice to rectify the failure or establish a plan for remedy. Consultant shall provide documentation of the remedy or proposed plan for approval by the Town.

The Town may terminate this Contract for cause if:

- A. In the opinion of the Town, the Consultant attempts to impose personnel, materials or services of an unacceptable quality;
- B. In the opinion of the Town, the Consultant fails to furnish the required services and/or deliverable within the time stipulated in the Contract;

- C. In the opinion of the Town, the Consultant fails to make progress in the performance of the requirements of the Contract;
- D. The Consultant gives the Town a positive indication that the Consultant will not or cannot perform to the requirements of the Contract.

If funds that are appropriated or allocated for the payment of obligations under this Contract are not allocated by the Town and available for the continued purchase of the services and/or materials provided under this Contract, this Contract may be terminated by the Town at the end of the period for which funds are available. The Town will notify the Consultant in the event that continued service will or may be affected by non-appropriation. No penalty shall accrue to the Town in the event that this provision is exercised, and the Town shall not be obligated or liable for any future payments due or for any damages as a result of termination under this paragraph.

Upon Notice of Termination the Consultant shall apprise the work the Consultant has completed and submit this appraisal to the Town for evaluation.

The Consultant shall receive as compensation for services performed through the date of such termination, a fee for the percentage of work actually completed. This fee shall be a percentage of the Consultant fee described in this Contract and shall be in the amount mutually agreed to between the Consultant and the Town. The Town shall make this final payment within sixty (60) days after the Consultant has delivered the last of the partially completed or services or deliverables.

Notice required under this section shall be in writing and shall be served by certified mail upon the other party. When served by certified mail, services shall be conclusively deemed made five (5) days after posting thereof in the United States mail, postage prepaid.

#### **SECTION X – LIQUIDATED DAMAGES**

If the work to be performed by the Consultant under this Contract is not timely completed, as negotiated the Consultant shall pay to the Town an amount as agreed to as liquidated damages for each day the work remains incomplete after the scheduled completion date. This amount is agreed upon because of the impracticability and extreme difficulty of ascertaining the actual damages the Town would sustain. The scheduled completion date for determining liability for liquidated damages shall be stated in consecutive calendar days from the effective date of Town's Notice to Proceed to Consultant subject to Section XI – Force Majeure.

For the purpose of determining applicability of liquidated damages (Section X), completion time shall be extended only if delay in completion of the work by the Consultant results from an unforeseeable cause beyond the control and without the fault or negligence of the Consultant.

#### **SECTION XI – FORCE MAJEURE**

Notwithstanding any other term, condition, or provision hereof to the contrary, in the event any party hereto is precluded from satisfying or fulfilling any duty or obligation imposed upon such party by the terms hereof due to labor strikes, material shortages, war, civil disturbances, weather conditions, natural disasters, acts of God or other events beyond the control of such party, the time period provided herein for the performance by such party of such duty or obligation shall be extended for a period equal to the delay occasioned by such events and must be agreed to **IN WRITING** by both parties.

**SECTION XII – ARBITRATION OF DISPUTES**

Any dispute arising under this Contract that is not settled by the Town and the Consultant may, upon mutual agreement of the parties, be decided by an Arbitration Board composed of a representative of the Town, a representative of the Consultant and a representative mutually acceptable to the Town and the Consultant. The Town, however, reserves its rights as set forth in Arizona Revised Statutes, Title 12. The Consultant shall continue to render all services requested in this Contract without interruption, notwithstanding the provisions of this Section. Nothing herein shall be deemed to require arbitration except at the Town's discretion. The laws of the State of Arizona shall apply to this Contract, and the Consultant agrees to the subject itself to the jurisdiction of the Courts of the State of Arizona for any conflict that arises from the terms of this Contract.

**SECTION XIII – INDEPENDENT CONSULTANT**

It is clearly understood that each party shall act in its individual capacity and not as an agent, employee, partner, joint venturer or associate of the other. An employee or agent of one party shall not be deemed or construed to be the employee or agent of the other party for any purpose whatsoever.

The Consultant is advised that taxes or social security payments shall not be withheld from a Town payment issued hereunder and that Consultant should make arrangements to directly pay such expenses, if any.

The Town will not provide any insurance coverage to the Consultant including Workers' Compensation coverage.

**SECTION XIV – OWNERSHIP OF DOCUMENTS**

All documents including, but not limited to, tracings, drawings, original mylars, estimates, field notes, investigations, design analysis and studies which are prepared in the performance of this Contract are to remain the property of the Town. The Consultant shall furnish the Town, upon request, originals or copies of technical specifications and copies of all documents listed above.

**SECTION XV – NO KICK-BACK CERTIFICATION**

The Consultant warrants that no person has been employed or retained to solicit or secure this Contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee; and that no member of the Town Council or any employee of the Town has an interest, financial or otherwise, in the Consultant firm.

For breach or violation of this warranty, the Town shall have the right to annul this Contract without liability or, at its discretion, to deduct from the Contract Price or consideration, the full amount of such commission, percentage, brokerage or contingent fee.

**SECTION XVI – CONFLICT OF INTEREST**

This Contract is subject to the provisions of A.R.S. § 38-511 which provides in pertinent part that the State, its political subdivisions or any department of either may, within three years after its execution, cancel any contract, without penalty or further obligation, made by the State, its political subdivisions, or any of the departments or agencies of either if any person significantly involved in initiating, negotiating, securing, drafting or creating the Contract on behalf of the state, its political subdivisions or any of the departments or agencies of either is, at any time, while the Contract or any extension of the Contract is in effect, an employee or agent of any other party to the Contract in any capacity or a Consultant to any other party to the Contract with respect to the subject matter of the Contract.

**SECTION XVII – ASSIGNMENT**

This Contract shall not be assignable except at the written consent of the parties, and it shall extend to and be binding upon the heirs, executors, administrators, successors and assigns of the parties.

The Consultant may assign money due to him under terms of this Contract to a banking or lending institute. The Town shall assist the Consultant in performing the assignment by testifying to the progress of the work as may be required.

**SECTION XVIII – ENFORCEMENT, LAWS AND ORDINANCES**

This Contract shall be enforced under the laws of the State of Arizona.

Each party must comply with all applicable federal, state, county and Town laws, ordinances and regulations.

Consultant shall ensure Consultant's obligation regarding payment of all taxes, license, permits and other expenses of any nature associated with the provision of services herein.

Consultant shall maintain in current status all Federal, State and local certifications required for the business operated by the Consultant.

**SECTION XIX – WAIVER**

The failure of either party of this Agreement to take affirmative action with respect to any conduct of the other which is in violation of the terms of this contract shall not be construed as a waiver thereof, or of any future breach or subsequent wrongful conduct.

**SECTION XX – ENTIRE CONTRACT**

This is the entire Contract between the parties. If any portion(s) of this Contract is (are) later found to be invalid or unenforceable, such portion(s) shall be null and void and without any effect on the rest of the Contract which shall continue in full force and effect.

**SECTION XXI - MISCELLANEOUS PROVISIONS**

- A. The Consultant shall establish and maintain procedures and controls that are reasonably acceptable to the Town for the purpose of assuring that no information contained in its records or obtained from the Town or from others in carrying out its functions under the contract shall be used by or disclosed by it, its agents, officers, or employees, except as required to efficiently perform duties under the contract. Persons requesting such information must be referred to the Town.
- B. The Consultant shall comply with all applicable provisions of the Americans with Disabilities Act (Public Law 101-336, 42 U.S.C. 12101-12213) and applicable federal regulations under the Act.
- C. In accordance with A.R.S. §35-391, the Consultant hereby certifies that the Consultant does not have scrutinized business operations in Sudan.

- D. In accordance with A.R.S. §35-393, the Consultant hereby certifies that the Consultant does not have scrutinized business operations in Iran.

## PRICE PAGE

Offeror shall provide a charge or fee for provision of all services described herein and in accordance with the following fee schedule.

The fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance. Fees shall be broken down by individual task. In addition, offeror shall provide billing rates for all individuals / disciplines included in the price proposal. These billing rates shall be used to adjust the fee based on any additional or decreased services as requested by the Town.

\$ \_\_\_\_\_  
(Words)

(\$ \_\_\_\_\_)  
(Figures)

**OFFER**

**TO THE TOWN OF ORO VALLEY:**

The Undersigned hereby offers and shall furnish the material or service in compliance with all terms, scope of work, conditions, specifications, and addenda in the Request for Proposal which is incorporated by reference as if fully set forth herein.

For clarification of this offer, contact:

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Town                      State                      Zip

\_\_\_\_\_  
Signature of Person Authorized to Sign

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Attachment #1

***PUBLIC PARTICIPATION PLAN  
FOR  
THE ORO VALLEY GENERAL PLAN***

## Acknowledgements

### **Town Council**

Satish Hiremath, Mayor  
Lou Waters, Vice Mayor  
Council Member Brendan Burns  
Council Member William Garner  
Council Member Joe Hornat  
Council Member Mary Snider  
Council Member Mike Zinkin

### **Planning & Zoning Commission**

William Rodman, Chair  
Don Cox, Vice Chair  
Commissioner John Buette  
Commissioner D. Alan Caine  
Commissioner Bill Leedy  
Commissioner Robert E. Swope

### **General Plan Scoping Committee**

Bill Adler	Board of Adjustment
David Adler	Conceptual Design Review Board
Don Cox	Planning & Zoning Commission
Helen Dankwerth	FOVPL and Board of Adjustment
Dick Eggerding	Conceptual Design Review Board
Ellen Guyer	Historic Preservation Commission
Joe Hornat	Town Council
Hal Linton	Conceptual Design Review Board
Stephen Roche	Board of Adjustment
Bill Rodman	Planning & Zoning Commission
Dino Sakellar	Conceptual Design Review Board
John Scheuring	Parks & Recreation Advisory Board
Michael Schoepach	Board of Adjustment
Bob Swope	Planning & Zoning Commission
Clifton Wickstrom	Parks & Recreation Advisory Board
Mike Zinkin	Town Council

### **Staff Support**

Greg Caton	Town Manager
Paul Keesler	DIS Director
David Williams	Planning Manager
Misti Nowak	Communications Administrator
Chris Cornelison	Constituent Services Coordinator
Bayer Vella	Conservation & Sustainability Administrator
Lynn Garcia	Administrative Coordinator
Daniel Harrison	Intern

# Public Participation Plan

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## ***I. Introduction***

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The Town of Oro Valley is beginning preparations to update its General Plan that will guide and inform critical decisions about the Town's future. This important effort, envisioned to be inclusive and community driven and supported, will provide guidance for public policy development that both defines the character of Oro Valley and sustains its functioning.

The General Plan update will replace the Town's current one (Focus 2020) that was adopted and ratified by voters in 2005. Since then, a significant increase in population has resulted in changes to the Town's demographic profile. This General Plan update presents the Town with a unique opportunity to engage the Town's residents and stakeholders in a dialogue to establish priorities and further define and guide the development of their community. Experience has taught us that only when people of all walks of life come together to discuss, debate and listen to one another do communities gain a larger understanding of who they are and how they want to move forward.

This public participation plan is designed to provide the community and stakeholders with diverse and meaningful opportunities for engagement. It specifically targets the Town's new demographics and includes a variety of ways to consult and collaborate with them. Understanding what stakeholders' concerns are and the aspirations they hold for themselves and their community are essential to the success of the update. Following the public participation plan should create a sense of community ownership that will ultimately result in an improved, supported and sustainable General Plan.

An Arizona state law known as the Growing Smarter Act mandates community planning. In terms of process, Arizona Revised Statutes 9-461.06 requires that a municipality's General Plan be readopted or a new one be adopted every ten years. Newer legislation extended the ten-year provision to July 1, 2015 for both counties and municipalities.

For a town of Oro Valley's size, the update must be ratified by the voters. The goal is to have the update adopted by the Mayor and Council in time for the 2016 General Election. This timeframe will be used to engage, incorporate their input and educate the community in order to build consensus for a voter-ratified update, while maximizing the efficient use of available resources.

## ***II. Extent of General Plan Update***

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The General Plan update process provides an opportunity to simplify language, clarify goals and policies, and better address current and projected needs and trends. Since the last state-required General Plan update, there has been a significant increase in population and changes to the demographic profile of the community. As a result, the needs and preferences of the community have likely shifted. The focus of the current General Plan is on preserving a "suburban/resort community," and as we move forward with the update, there may be greater appreciation for a "full-service community" that includes employment centers, commercial services and housing choices.

An update of the General Plan also provides an opportunity to unify numerous specialized plans that have been developed over the last eight years, including economic development strategies and the Strategic Plan. Furthermore, there are other key planning issues which require updating, such as finance, housing choices, expansion of the Town (Arroyo Grande) and long-range park planning.

The General Plan Scoping Committee, a team of Town Council, board, and commission members, recognizes the quality of the current General Plan and considers the guiding principles represented in the current General Plan as relevant and sound, serving as a very strong base. The General Plan Scoping Committee recognizes that many of the chapters require very little updating; however, the committee has also identified chapters that will require more extensive work. For purposes of assigning a project scope, a full rewrite of the General Plan is not anticipated; however, on a scale of 0 (no change) to 5 (major change), the expected level of effort is approximately a 3. Because the Town's ultimate objective is voter ratification, the extent of the General Plan update will be shaped by community participants. During the two-year process, the Town must maintain dialogue with the community to continually test assumptions and adjust accordingly.

### ***III. Purpose***

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This Public Participation Plan was designed to support the Town's primary goal of developing a community- and consensus-based, defensible and voter-ratified General Plan update. To accomplish that, the update must represent a shared community vision and guiding principles, and the public participation must be inclusive, educational and far-reaching. This Public Participation Plan identifies the process to reaffirm or adjust the current General Plan vision, guiding principles, goals and policies so that the update will resonate with the community and be broadly endorsed by voters.

The Public Participation Plan outlines the steps Town staff will take to encourage and solicit community involvement in the update process. It identifies specific methods and techniques that motivate members of the community to:

- Be informed about the preparation, content and use of the General Plan
- Identify key components of community
- Communicate needs and expectations for the future
- Work together to reach consensus on ways to address key community issues
- Contribute to achieving voter ratification

This Public Participation Plan establishes strategies that satisfy the state mandates in the Growing Smarter Act. ARS § 9-461.06 requires that municipalities' *"governing bodies shall adopt written procedures to provide effective, early and continuous public participation in the development and major amendment of general plans from all geographic, ethnic, and economic areas of the municipality."* Furthermore, the *"procedures shall provide for:*

- a) *The broad dissemination of proposals and alternatives*
- b) *The opportunity for written comments*
- c) *Public hearings after effective notice*
- d) *Open discussions, communications programs and information services*
- e) *Consideration of public comments."*

## ***IV. Public Participation Plan Process, Status Reports & Changes***

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### **Public Participation Plan Process**

All key building blocks to develop this Public Participation Plan were reviewed by a General Plan Scoping Committee (GPSC). The result is a sound Public Participation Plan with proven techniques to engage the public, as well as new outreach efforts in an attempt to reach and inform more of the community.

The GPSC was a 16-member team comprised of residents currently serving on Town boards, commissions and Town Council. The Committee was charged with three primary tasks:

- Estimate the extent of General Plan update needed
- Review public participation methods and techniques
- Identify recommended public participation methods and techniques for review by the Planning & Zoning Commission and Town Council

Over the course of five meetings, the GPSC helped develop and review:

- Community changes since adoption of the current General Plan
- Relevancy of the current General Plan and specific elements
- Public participation lessons learned from the 2005 General Plan effort
- Lists of key stakeholders and project participants
- Future public participation “must-do’s”
- Three public participation approaches (base, intermediate and comprehensive) and associated budgets
- A recommended public participation approach and budget

Gordley Group, a local public relations and involvement firm, helped to refine Public Participation Plan elements. From this base of community and professional guidance, staff drafted this Public Participation Plan.

On April 2, 2013, the Planning & Zoning Commission voted to recommend approval of the Public Participation Plan to the Oro Valley Town Council. The Public Participation Plan was formally adopted by the Town Council on May 1, 2013.

### **Status Updates**

Staff will update Town Council on the progress and results of the Public Participation Plan periodically.

### **Changes**

As the Town implements the Public Participation Plan, flexibility is a necessary component. This plan is a living document that may need to be changed in order to respond to lessons learned during implementation. If one method proves more or less effective than another, resources will be adjusted accordingly. Town Council will be informed of any significant changes to the program.

## ***V. Public Participation Guiding Principles***

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To meet the Town’s goal for a voter-ratified General Plan update, this Public Participation Plan was designed to connect residents to the Town and to each other. This connection will result in better-supported and more sustainable decisions.

The Public Participation Plan:

- Is open, transparent, accountable, inclusive, collaborative and ethical
- Ensures involvement opportunities are convenient for residents
- Promotes sustainable decisions that resonate with the voting community
- Seeks and facilitates involvement of all demographics
- Will be assessed on an ongoing basis to ensure best practices
- Includes how the public’s involvement helps to shape the decisions made for the General Plan

Additional guiding principles:

- Learn from the past—focus on:
  - Residents
  - Targeted voter outreach
  - Adequate community testing of principles and concepts
  - Diversified viewpoints and better committee membership selection
  - Earning voter ratification
- Residents’ quality of life
  - To overcome the challenge that the General Plan is merely a dry technical planning tool, present it as a tool to guide and define the community’s quality of life, focusing on issues with which residents can easily identify
  - Draw participants and votes by asking—and answering—the question: “Why is this important to me?”
- Key objectives
  - Provide practical, clear and compelling information that directly relates the General Plan to residents’ lives
  - Use public-friendly, easy-to-understand, engaging, inviting and visionary methods, techniques and tools
  - Report positive, tangible results from the current General Plan to build upon success
  - Speak to specific and positive outcomes in the proposed General Plan
  - Reach the broad community of voters to identify and test multiple opinions
  - Keep participants informed throughout the process in open and direct ways
  - Maintain a consistent outreach focus throughout the implementation
  - Go to the community; do not solely rely on the public to attend large forums

## ***VI. Stakeholder Identification***

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The Town's residents are the primary stakeholders in this effort. Additional care has been taken to study Oro Valley's current demographic profile to tailor public participation opportunities.

The Growing Smarter Act defines a broad spectrum of stakeholders. The law requires that the governing body "*Consult with, advise, and provide an opportunity for official comment by public officials and agencies, the county, school districts, associations of governments, public land management agencies, the military airport...other appropriate government jurisdictions, public utility companies, civic, educational, professional and other organizations, property owners and citizens generally to secure maximum coordination of plans and to indicate properly located sites for all public purposes in the general plan*".

This mandate is inline with the Town's objective to be inclusive. A comprehensive list of stakeholders is included as Attachment #1. Each will be contacted and invited to participate. Because it is important that the Town pays attention to the best ways to reach and listen to all groups, stakeholders will be asked to identify additional stakeholders, groups, organizations and opportunities for community involvement.

## ***VII. Communication Methods and Techniques***

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In keeping with the Public Participation Plan's guiding principles, communication methods and techniques are designed to reach a broad spectrum of the community and educate them about the process, garner meaningful input and, ultimately, obtain voter ratification. Engaging the community will provide them with a sense of ownership for the General Plan and build trust in the Town, resulting in quality participation and greater likelihood of positive voter turnout.

All aspects of the General Plan, including the name, must be transformed from an esoteric technical planning tool into an effort for residents and stakeholders to further develop Oro Valley's high quality-of-life. The first step will be to create a project identity, including an appealing name, logo, tagline and core messaging pertinent to each phase of the project. All General Plan materials will carry this "project look." Materials will also be clear, easy-to-understand, engaging and show how the General Plan directly relates to the quality of participants' lives in Oro Valley and why it should matter to them.

To provide ample opportunity to residents and stakeholders for participation, a variety of communication methods and techniques will be employed. By ensuring opportunities are welcoming and convenient, we will expand the pool of participants. To this end, social media tools and small gatherings in convenient locations are key outreach methods. This approach will be supplemented with traditional community outreach, such as community open houses.

Public and stakeholder meetings, focus groups, small group gatherings and other activities will be organized to produce results. Leaders will clearly outline participants' roles and anticipated time commitment, as well as proposed outcomes to the activity. Leaders will ensure there is time for participants to get acquainted with each other, the issues and the process. Next steps will be clearly outlined. Activities will be designed so that participants have the time to understand different points of view and resolve issues that may arise. Participants will be encouraged to develop a common sense of purpose and definitions of challenges faced by the community.

Participants will also be encouraged to connect with and educate one another. Each meeting will show how previous public input has been incorporated into the General Plan.

The matrix on the following page, Exhibit 1, includes a toolbox of recommended methods and techniques, with the corresponding participants targeted. Attachment #2 includes a description of key terms and definitions used in the matrix.

### Exhibit I, Methods & Techniques

Method	General Description of Participants
<b>TARGETED PARTICIPATION</b>	
<i>Committees</i>	
Environment Committee	Residents. Demographic = Boomers
Community Committee	Residents and business interests. Demographic = Boomers
Development Committee	Residents. Demographic = Boomers
Joint Meeting of Committee Representatives	Residents. Demographic = Boomers
<i>Small Event Meetings</i>	
Leadership Interviews	Elected officials, community, environment, business, and school leadership
One on Ones with Stakeholders	Broad spectrum of interests
HOA Meeting Participation Series	HOA board members and residents. Demographic = Boomers
Community Conversation on Your Corner	Residents. Demographic = Boomers
Town Department Review	Departmental staff
Stakeholder Mtgs. - Gov. & Schools	District officials and parent organizations
Stakeholder Mtgs. - Community Groups	Broad spectrum of interests
Stakeholder Mtgs - AZ State Land Dept	Homeowners, Sierra Club, EPA
Stakeholder Mtgs - Developers/Landowners	Realtors, developers and major landowners
Boards & Commissions Workshops	Appointed officials
PZ Commission Study Session	Appointed officials
Focus Group on Land Use	Residents. Demographic = Boomers
Focus Group on Economic Development	Residents and business leadership. Demographic = Boomers and middle age
Youth Values Institute	Residents = Demographic = Families and youth
Neighborhood Gatherings	Residents. Demographic = Boomers and middle age
<b>COMMUNITY PARTICIPATION</b>	
<i>Large Event Meetings</i>	
Town Hall I: Project Kick-off & Future Search	Residents. Demographic = Boomers
Open House	Residents. Demographic = Boomers
Public Hearings	Residents. Demographic = Boomers
<i>Community Events</i>	
Annual HOA forum	HOA board members and residents. Demographic = Boomers
State of the Town	Broad spectrum of community interests. Demographic = Boomers and middle age.
School Functions	Residents. Demographic = families and youth
TOV Volunteer Dinner	Town volunteers. Demographic = Boomers
<i>Web and Social Media</i>	
Facebook	
Twitter	
Orovalleyaz.gov	Broad spectrum of community interests. Demographic = Boomers, middle age and youth
MindMixer	

<b>Method</b>	<b>General Description of Participants</b>
<b>COMMUNITY PARTICIPATION continued</b>	
<b>Surveys</b>	
MindMixer	
Surveys in NW Explorer	Broad spectrum of community interests. Demographic = Boomers and middle age
Phone Surveys	
Informal Event Surveys & Comment forms	
<b>Local News Media</b>	
NW Explorer - Advertizing Space	
NW Explorer - Quarterly Article	Broad spectrum of community interests. Demographic = Boomers and middle age
Vista Articles	
News Release	
Letters to Editor Response	Demographic = Boomers
Articles in HOA Newsletters	HOA board members and residents. Demographic = Boomers and middle age
<b>Water Bill Inserts</b>	
Postcards to Advertise Website & MindMixer	Broad spectrum of community interests. Demographic = Boomers and middle age
Voter Education Postcard	Broad spectrum of community interests. Demographic = Boomers and middle age
<b>BALLOT VOTE</b>	Residents. Demographic = Vote eligible
<b>TOOLS &amp; TECHNIQUES</b>	
Community Strategy #1: This Is Important!	Broad spectrum of OV voters. Demographic: Boomers, middle age and youth
Community Strategy #2: Participate	
Community Strategy #3: Vote	
Community Speakers Bureau	
Leadership Bureau	
Traveling Mobile Display	
Technical Reports	Broad spectrum of stakeholders.

The timing of communication methods and techniques is a key to success. Each will be strategically implemented during targeted phases of the project to maximize effectiveness, and key milestones in the process will be appropriately acknowledged and celebrated. Attachment #3 represents the timing of community outreach relative to key project phases.

## ***VIII. Planning Process***

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The General Plan process is intended to be completed over multiple years, culminating in a public vote to ratify the Town Council's adoption of the General Plan.

The initial steps entail identifying and gathering information and community resources. The first milestones include development and approval of a Public Participation Plan, budget planning, development of schedules, collection of data pertaining to all General Plan elements and planning committee process.

The planned project phases are:

*Phase I – Issues/Vision/Core Principles:* Identification, development and testing of a community vision and guiding principles. This will entail significant community outreach.

*Phase II – Draft and Committee Review:* Goals and policies for all General Plan elements associated with the environment, community and development will be reviewed by committees, boards, commissions and stakeholders.

*Phase III – Final Draft and Adoption:* Adoption of the updated General Plan will occur through a formal public review process: 1) Final draft review by a committee, 2) Review by agencies identified in state statute, 3) Opportunities for community review 4) Public hearings by the Planning & Zoning Commission, 5) Public hearing and adoption by the Town Council.

*Phase IV – Ratification:* A public outreach and education campaign will result in ratification of the updated General Plan by Town voters.

Project milestones are provided in Attachment #4.

## ***XII. Public Meeting Scheduling, Location and Access***

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In planning public and stakeholder meetings, small gatherings, focus groups and other outreach activities, scheduling and location will be made as accessible and convenient as possible, taking into account available resources. Large meetings and forums will be scheduled at different times, including non-traditional business hours, and every effort will be made to avoid conflict with other community activities. When possible, activities will be scheduled in conjunction with other Town or community activities to maximize participation. Public outreach will occur throughout the Town to reach as many people as possible.

Public meetings will be held in locations accessible to people with disabilities and will be held near to transit routes whenever possible.

## ***XIII. Special Accommodations***

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Every effort will be made to accommodate people with special needs who would like to participate. Summary information related to the update will be made available in languages other than English, as requested.

Additionally, notification for public meetings will include the following language or other Town-approved language:

“For accommodations, materials in accessible formats, foreign language interpreters and/or materials in a language other than English, please contact [person] and [phone number] or [email address] at least five business days in advance of this scheduled event.”

## **XIV. Process Documentation**

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All outreach will be documented for future use and understanding of how the program was conducted, how the public responded and how the results of the outreach were used in the development of the General Plan. Documentation will include electronic copies of:

- The final, adopted Public Participation Plan
- Lists and samples of public notification, information and educational materials
- Stakeholder database
- List of publicity obtained and, to the extent possible, copies of news articles, display ads, etc.
- Summaries of public and stakeholder meetings, focus groups and small group gatherings to show outcomes

## **XV. Evaluation System**

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To ensure that the process is inclusive and is achieving the Public Participation Plan goals, the following evaluation system will be utilized:

- Staff administering this Public Participation Plan will review the effectiveness of implementation on a regular basis to confirm it is meeting goals mandated by state law and principles identified herein.
- Opportunities for feedback regarding the public participation activities will be provided through the project website, social media and at meetings, forums and open houses. Feedback will be reviewed and adjustments made where warranted.
- A quarterly update on the implementation effort of the Public Participation Plan will be made to the Planning & Zoning Commission and Town Council.
- As part of the General Plan adoption process, a report will be presented to the Planning & Zoning Commission and Town Council analyzing the results of the public participation process at the end of the process.

## **Attachment #1 – Community Stakeholders**

### **COMMUNITY STAKEHOLDERS:**

#### **Residents (2010 Census):**

- Households with kids: 25% of Total Households
- Boomers (55 or older) = 41.8%
- Boomers who live in Oro Valley seasonally
- Gen X (35 – 54) = 25.9%
- Gen Y (15-34) = 17.3%
- Gen Z (14 & younger) = 15.1%

#### **Homeowners Associations**

All within Town limits (110 total)

All within planning boundaries

#### **Businesses Interests:**

Oro Valley Chamber of Commerce

Large Business Owners (Oro Valley Hospital, Sanofi Adventis, Ventana Roche, El Conquistador Resort, major shopping centers (Oro Valley Marketplace, Rooney Ranch, Steam Pump Ranch, etc.)

Small Business Owners

Oro Valley Business Club

Economic Development Zone

Resort/Hospitality Association

Tucson Regional Economic Opportunities Inc. (TREO)

#### **Building Industry Interests**

Metropolitan Pima Alliance (MPA)

Tucson Realtors Association

Southern Arizona Builders Association (SAHBA)

Land Speculators

#### **Environmental Interests**

Coalition for Sonoran Desert Protection

Tucson Audubon Society

Sonoran Institute

#### **Arts and Cultural Interests**

Southern Arizona Arts & Cultural Alliance (SAACA)

Oro Valley Historical Society

Santa Cruz Heritage Alliance

Tohono Chul Park

**Churches:**

St Elizabeth Ann Seaton, St Odelia, Church of the Apostles, Oro Valley Church of the Nazarene, Oro Valley United Church, St. Mark Catholic Church, Pusch Ridge Christian Church, Vistoso Community Church, Church of the Jesus Christ of Latter-day Saint and, Resurrection Lutheran Church, Dove Mountain Church

**Schools**

Casas Christian School, Robert B. Wilson Junior K-8<sup>th</sup>, Pusch Ridge Christian Academy, Pusch Ridge Christian School, Basis Oro Valley, Ironwood Ridge High School, Canyon Del Oro High School, Painted Sky Elementary School, Immaculate Heart Academy, Resurrection Lutheran Child and La Canada Kindercare.\*

\*Focus on governing boards, parent associations, and students (where appropriate)

**Service Organizations**

Oro Valley Rotary Club

Oro Valley Optimist Club

Catalina-Oro Valley Lions Club

**Other**

Owners of vacant land – large and small

Oro Valley Citizen Advisory Boards and Commissions

Let Oro Valley Excel (LOVE) Blog

Oro Valley Truth Blog

Users of Parks & Recreation Facilities

Library patrons

Friends of the Library

Employees of Large Business in Oro Valley

Oro Valley Hospital patrons

Southern AZ Hiking Club

El Conquistador County Club Golf Association Governing Board & other boards affiliated with golf courses in or adjacent to Oro Valley

Oro Valley Democrat and Republican organizations

YMCA

Jewish Federation Northwest

## **REGULATORY AND PLANNING AGENCIES:**

### Federal:

Bureau of Land Management  
Bureau of Reclamation  
U.S. Fish & Wildlife Service  
U.S. Forest Service  
National Park Service

### State:

Arizona Department of Transportation (ADOT)  
Arizona State Land Department (ASLD)  
Arizona Department of Commerce  
Arizona Game and Fish  
Arizona State Parks Department

### Regional:

#### Pima County

Sonoran Desert Conservation Plan Team  
Planning and Development  
Department of Transportation (PCDOT)  
Parks Department

#### Pinal County

Planning and Development  
Department of Transportation (PCDOT)

#### Flood Control District of Pima County

Pima Association of Governments (PAG)  
Santa Catalina Ranger Station  
Catalina State Park  
Coronado National Forest  
Pima Council on Aging/ Mature Worker Connection  
Regional Transit Authority

### Local:

#### Town of Oro Valley

Town Manager's office  
Development & Infrastructure Services  
Water Utility  
Town Attorney's Office  
Parks, Recreation and Cultural Services  
Finance  
Police  
Golder Ranch Fire District  
Town Clerk's office  
Courts  
Information Technology

#### Amphi School District

Marana Schools  
Town of Marana  
City of Tucson  
Catalina Coordinating Council  
Pima Community College  
Imagine Greater Tucson

## **Attachment #2 – Terms & Definitions for Public Participation Methods**

**Annual HOA forum:** Utilize a pre-existing forum for HOAs and managers to invite participation and garner input from the neighborhood representatives.

**Articles in HOA Newsletters:** Articles may be provided to local HOA and Neighborhood Associations to attract residents to meeting, participate and discuss, and inform residents to the planning process and update.

**Boards & Commissions Workshops:** Individual sessions with all seven Town boards and commissions to invite participation, identify issues and review General Plan Update items. Topics will be oriented toward the specific focus of each board and commission.

**Committee(s):** Each committee is comprised of Oro Valley residents and categorized by specific topic areas. Committees are responsible for review of drafts developed by staff.

- **Development:** This committee is responsible for sections pertaining to *land use, community design, cost of development and transportation/circulation.*
- **Environment:** This committee is responsible for sections pertaining to *open space and natural resources conservation, water resources and environmental planning.*
- **Community:** This committee is responsible for sections pertaining to *economic development, public facilities, services and safety, arts and culture, parks and recreation, archaeological and historic resources and housing.*

**Community Conversation on Your Corner:** Venue for residents to participate in quality of life discussions at common gathering areas throughout the community.

**Community Speakers Bureau:** A team of volunteer speakers who are residents and well versed in community planning. Their charge is to speak at events and forums throughout the community. The aim is to invite the community to participate and discuss quality of life issues with residences.

**Community Strategy(s):**

- **#1: This Is Important!:** An informational outreach strategy and tools specific to introducing the project.
- **#2: Participate:** An informational outreach strategy and tools specific to seeking participation.
- **#3: Vote:** An informational outreach strategy and tools specific to voter education.

**Community Participation:** A general category of methods used to engage the larger community, opposed to a key stakeholder group.

**Facebook:** Web-based system used to invite residents to participate and share information. Also, notices and updates may be posted to collect comments.

**Farmers Market:** Provide an information and survey booth to invite residents to participate and discuss community values.

**Focus Group(s):**

- **Economic Development:** Topic specific meeting of residents and business leaders in the community with interest in the future economic development of the Town.
- **Land Use:** Topic specific meeting of residents with special training or interest in land use planning and mapping.

**HOA Meeting Participation Series:** Participation in annual or regular HOA meetings to invite participation and discuss quality of life issues.

**Informal Event Surveys & Comment forms:** Surveys that are created to directly gather input at specific events.

**Joint Meeting of Committee Representatives:** Meeting of representatives from the Development, *Environmental and Community* committees. The objective is to insure that findings from the individual committees harmonize to create a holistic approach.

**Leadership Bureau:** A team of community leaders whose purpose is to help advocate community participation and “get out the vote”.

**Leadership Interviews:** One on one meetings to interview local leaders such as Town Council, school boards, key employers, HOA representatives etc.

**Letters to Editor Response:** Town response to address relevant concerns expressed in the *NW Explorer*.

**MindMixer:** A web-based discussion board that enables participation on a wide range of topics for comment. Participants may also post new topics or ideas. This tool will be used to attract participants such as young families who may not have time to attend evening meetings.

**Neighborhood Gatherings:** Neighborhood block meetings organized by interested residents. Members of the Speakers Bureau or staff will initiate discussions regarding the vitality of the community.

**News Release:** Media alerts to invite participation and share important milestones in the process.

**NW Explorer - Advertizing Space:** Advertising to increase participation in event, meeting, survey and web-based discussion opportunities.

**NW Explorer - Monthly Article:** Articles inviting participation, analysis of key community issues and reporting general plan update progress.

**One on Ones with Stakeholders:** Meetings with special interest stakeholders to discuss issues and concerns.

**Open House:** Opportunity for residents to meet with staff and community leaders to discuss quality of life issues and/or elements of a draft General Plan.

**Orovalleyaz.gov:** Display of General Plan updates, meeting announcements and background reports on the Town website.

**Postcards:** Mailed cards to invite participation in events, electronic surveys and voter ratification.

**Public Hearings:** Formal hearings to vote on the final draft of the General Plan update.

**PZ Commission Study Session:** Updates regarding progress and findings over the term of the project.

**School Functions:** Utilize existing school events to invite participation and survey quality of life issues.

**Speakers Bureau:** Community leaders whose purpose is to meet with community groups (HOA’s etc.), invite participation and lead discussions relative to quality of life issues.

**Stakeholder Meeting(s):** Staff meeting(s) with key stakeholders to discuss potential issues or concerns.

- **AZ State Land Dept.:** The Arroyo Grande area is a sizable component of the General Plan. ASLD must be provided the opportunity to review all General Plans in Arizona.
- **Developers/Landowners:** Developers, realtors and landowners interested in economics, land use policy and community design.
- **Community Groups:** Non-profits, clubs, churches etc.

- **Gov. & Schools:** Surrounding jurisdictions and schools (public, charter and private) within Oro Valley.

**State of the Town:** A standing annual event attracting a broad cross-section of community leaders and interests.

**Surveys in NW Explorer:** Published survey to identify community values and needs that respondents mail back to the Town. The aim is to reach a broader audience than can be anticipated at meetings.

**Targeted Participation:** Methods used to “target” specific community groups, locations, and/or topics; rather than the community as a whole.

**Technical Reports:** Baseline information such as census or housing data to use in decision-making.

**Town Department Review:** Internal review process involving Town agencies to ensure timeliness and validity.

**Town Hall I: Project Kick-off & Future Search:** A large event for residents to define project objectives, invite participation and discuss quality of life issues.

**TOV Volunteer Dinner:** Dinner hosted for the volunteers that assisted throughout the General Plan Update.

**Traveling Mobile Display:** An informational display booth to be used at various events throughout the process.

**Twitter:** “tweets” will be used to send event, meeting, and progress alerts. Also Twitter will be used to invite participation in surveys.

**Vista Articles:** Quarterly online articles submitted to the Town.

**Voter Education Postcards or Newsletter:** Mailer used to describe the General Plan ballot measure.

**Youth Values Institute:** A gathering of younger generations to discuss community values, issues and needs.

### Attachment #3 – Public Participation Flowchart

Public Participation Plan	Phase I	Phase II			Phase III	Phase IV
	Community Values	Draft Elements			Final Draft & Adoption	Vote
		Environment	Community	Development		
<b>Targeted Participation</b>						
<b>Committees &amp; Boards</b>						
Environment Committee		☒				
Community Committee			☒			
Development Committee				☒		
Joint Meeting of Committee Representatives	☒				☒	☒
<b>Small Event Meetings</b>						
Leadership Interviews (20 persons per set)	☒				☒	☒
One on Ones with Stakeholders	☒	☒	☒	☒	☒	☒
HOA Meeting Participation Series	☒				☒	☒
Community Conversation on Your Corner						
Town Department Review Meetings	☒	☒	☒	☒	☒	☒
Stakeholder Mtgs. - Gov. & Schools	☒				☒	☒
Stakeholder Mtgs. - Community Groups	☒	☒	☒	☒	☒	☒
Stakeholder Mtgs - AZ State Land Dept	☒				☒	☒
Stakeholder Mtgs - Developers/Landowners				☒		
Boards & Commissions Workshops	☒	☒	☒	☒	☒	☒
PZ Commission Study Session					☒	☒
Focus Group on Land Use				☒		
Focus Group on Economic Development			☒			
Youth Values Institute	☒					
Neighborhood Gatherings	☒				☒	☒
<b>Community Participation</b>						
<b>Large Event Meetings</b>						
Town Hall I: Project Kick-off & Future Search	☒					
Open House					☒	☒
Public Hearings					☒	☒
<b>Community Events</b>						
Annual HOA forum	☒					
State of the Town	☒					☒
School Functions	☒					☒
TOV Volunteer Dinner	☒					☒
<b>Web and Social Media</b>						
Facebook	☒	☒	☒	☒	☒	☒
Twitter	☒	☒	☒	☒	☒	☒
Orovalleyaz.gov	☒	☒	☒	☒	☒	☒
Mindmixer (software and initial setup)	☒	☒	☒	☒	☒	☒
<b>Surveys</b>						
Mindmixer (design of surveys)	☒	☒	☒	☒	☒	☒
Survey Published in NW Explorer	☒					
Informal Event Surveys & Comment forms	☒	☒	☒	☒	☒	☒
Phone Surveys	☒				☒	
<b>Local News Media</b>						
NW Explorer - Advertizing Space	☒	☒	☒	☒	☒	☒
NW Explorer - Quarterly Article	☒	☒	☒	☒	☒	☒
Vista Articles	☒	☒	☒	☒	☒	☒
News Release	☒				☒	☒
Letters to Editor Response	☒				☒	☒
Articles in HOA Newsletters	☒				☒	☒
<b>Water Bill Inserts</b>						
Postcards to Advertize Website & Mindmixer	☒				☒	
Voter Education Postcard					☒	
<b>Ballot Vote</b>						
<b>Tools &amp; Techniques</b>						
Communication Strategy #1: This is important!	☒					
Communication Strategy #2: Participate!	☒					
Communication Strategy #3: Vote!						
Community Speakers Bureau	☒	☒	☒	☒	☒	
Leadership Bureau	☒	☒	☒	☒	☒	
Traveling Mobile Display	☒				☒	
Technical Reports (baseline information)	☒					

### Attachment #4 – Project Milestones

Milestone	Approximate Date
Planning & Zoning Commission review of Public Participation Plan	April 2013
Town Council review of Public Participation Plan	May 2013
Develop technical background reports	May–July 2013
Budget adoption	July 2013
Hire consultant/contractors	Fall 2013
Finalize formal schedule	Fall 2013
General Plan public kick-off and start of community engagement	Fall 2013
Draft elements	2013–2014
Committee review	2014–2015
Develop final draft	2015
Public review of draft General Plan	2015
Inter-agency review	2015
Draft Implementation Plan	2015
Planning & Zoning Commission study sessions and public hearing	2015
Town Council public hearing and adoption	2015
Ratification election	2016