



Proclamation

Mental Health Awareness Month

May 2020

20-22

WHEREAS, the mental health of every citizen is essential to the emotional and economic prosperity of our families, communities, and businesses in Queen Anne's County; and

WHEREAS, mental health is a key component of every individual's overall physical health and emotional well-being; and

WHEREAS, mental illness affects people of all ages, races, ethnicities, and income levels in Queen Anne's County; and

WHEREAS, mental health conditions are not only common, they are treatable, and early effective intervention can save the trajectories of people living with mental illness; and

WHEREAS, feelings of personal shame and fears of social stigma and discrimination prevent many, living with mental illness, from seeking help; and

WHEREAS, untreated mental illness leads to higher rates of emergency department visits, hospitalizations, school dropouts, and suicides; and

WHEREAS, stigma leads to fear, mistrust, and violence against people with mental illness, who are significantly more likely to be victims than perpetrators of violent crimes; and

WHEREAS, stigma can be reduced by increasing the awareness of mental illness and available resources for those suffering from mental health conditions; and

WHEREAS, greater public awareness about mental illness can positively transform attitudes about, and towards people with mental illness, making it easier for the citizens of Queen Anne's County to seek help;

NOW, THEREFORE, WE, THE COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY, do hereby declare May 2020 Mental Health Month. We call on our citizens, agencies, private institutions, businesses and schools in Queen Anne's County to recommit to increasing awareness of mental health and to recognize the necessity of accessible and appropriate mental health services for all citizens of Queen Anne's County.

QUEEN ANNE'S COUNTY
BOARD OF COUNTY COMMISSIONERS



Proclamation

Older Americans Month 2020: Make Your Mark
20-26

WHEREAS, Around the nation, older adults make their marks every day as volunteers, employees, employers, parents, grandparents, mentors, and advocates. They offer their time, talents, and experience to the benefit of our communities; and

WHEREAS, Queen Anne's County includes a growing number of older Americans who make countless contributions to our community every day; and

WHEREAS, Queen Anne's County is stronger when people of all ages, abilities, and backgrounds are included and encouraged to make their mark; and

WHEREAS, Queen Anne's County recognizes the importance of the physical, mental, social, and emotional well-being of its citizens; and

WHEREAS, Queen Anne's County can support our community members by: promoting independence, inclusion, and participation; engaging older adults through education, recreation, and service; and connecting people with opportunities to share their time, experience, and talents.

NOW, THEREFORE, WE, THE COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY, do hereby proclaim May 2020 to be Older Americans Month and urge every resident to recognize older adults and the people who support them as essential members of our community.

**QUEEN ANNE'S COUNTY
BOARD OF COUNTY COMMISSIONERS**

James J. Moran, President

Jack N. Wilson, Jr.



Stephen Wilson

Pillar of the Month for May
"Caring"

20-27

WHEREAS, almost 20 years ago, Queen Anne's County was declared a Character Counts! Community, and we as citizens were encouraged to come together and build a strong community based on the 'Six Pillars of Character'; and

WHEREAS, all citizens, throughout these years, have worked so hard to embrace the "Six Pillars of Character" and incorporate them into their daily activities and to model these traits of good character, and by doing so we have created this healthy, safe and secure place for our families; and

WHEREAS, the *Character Counts!* Pillar of the Month of May is 'Caring', and we as citizens of Queen Anne's County, in the midst of this unprecedented National Emergency created by the COVID-19 virus, have really seen our Character Counts! community stand up during this challenge and show that 'Caring' is essential at a time like this; and

WHEREAS, in Queen Anne's County, we see and feel the spirit of Character Counts! and the entire county uniting with an overabundance of kindness; showing they care, helping those in need, being thankful and expressing gratitude; and

WHEREAS, 'Caring' are the many organizations throughout our community that have stepped up and bonded together and continue to provide food to anyone and everyone here in Queen Anne's County so our citizens will not worry about this basic human need; and

WHEREAS, 'Caring' are those who are helping others however they can, by volunteering their time or resources, shopping for those who cannot get out, for making and distributing masks for our community or for just being a friend during these uncertain times; and

WHEREAS, 'Caring' are the schools and the teachers who have stepped up and adapted to Distance Learning so our children can continue to learn and to Character Coaches that have resumed virtual Character Counts! lessons so we may continue to instill and highlight these important values in our youth; and

WHEREAS, 'Caring' is being thankful and grateful for the frontline workers here in Queen Anne's County and everywhere for doing what they do, day after day, trying to save lives and keep us safe and provided for;

NOW, THEREFORE, WE, THE COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY, do hereby designate the *Character Counts!* Pillar of the Month for May to be 'Caring' and call upon all Queen Anne's County citizens at this time to Stay Home, Be Safe and continue to join together and support the "Six Pillars of Character".

Written by Kelly Huber on behalf of the Character Counts! Advisory Council

**QUEEN ANNE'S COUNTY
BOARD OF COUNTY COMMISSIONERS**

James J. Moran, President



Queen
Anne's
County

DEPARTMENT OF COMMUNITY SERVICES

Housing and Community Services

104 Powell Street
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E-mail: DHCS@qac.org

County Commissioners:

- James J. Moran, At Large
- Jack N. Wilson, Jr., District 1
- Stephen Wilson, District 2
- Philip L. Dumenil, District 3
- Christopher M. Corchiarino, District 4

ACTION ITEM

TO: Queen Anne's County Commissioners

FROM: Michael Clark, Chief of Housing & Family Services

RE: Village at Slippery Hill Request for Support of Phase II

DATE: May 12, 2020

Green Street Housing is applying for Low Income Housing Tax Credit (LIHTC) financing and other Maryland Department of Housing and Community Development (DHCD) rental housing program resources to finance the construction of the second phase of the Village at Slippery Hill. It is an affordable rental community located in Grasonville in which the second phase will include housing for the elderly. In order to make their application strong they are requesting support from the County Commissioners. Specifically they would like the commissioners to increase the Payment in Lieu of Taxes amount for the senior housing portion of the second phase from \$200 to \$400 per apartment and a support letter from the Commissioners to the Secretary of Housing at DHCD.

Under this cover is a Project Summary of The Village of Slippery Hill Phase II, A resolution for Payment in Lieu of Taxes, the Payment in Lieu of Tax Agreement (to be signed by the County Administrator), and a letter of support from the County Commissioners to DHCD.

If the commissioners would like to support the second phase of this project we request that you make the following two motions:

MOTION 1: WE MOVE TO SIGN THE PAYMENT IN LIEU OF TAXES RESOLUTION AND AUTHORIZE THE COUNTY ADMINISTRATOR TO SIGN THE PAYMENT IN LIEU OF TAXES AGREEMENT BETWEEN QUEEN ANNE'S COUNTY AND A SPECIAL PURPOSE ENTITY OR



ENTITIES TO-BE-FORMED TO OWN AND DEVELOP THE PROPERTY.

MOTION 2: WE MOVE TO SIGN THE ENCLOSED LETTER ADDRESSED TO SECRETARY HOLT OF THE MARYLAND DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT IN SUPPORT OF GREEN STREET HOUSING'S HOUSING EFFORT TO RECEIVE LOW-INCOME HOUSING TAX CREDITS (LIHTC) FOR THE NEXT PHASE OF THE SLIPPERY HILL DEVELOPMENT.

THE VILLAGE AT SLIPPERY HILL

Phase II & Senior Building

Nesbit Road, Grasonville, MD Queen Anne's County



PROJECT SUMMARY

The Village at Slippery Hill , Phase II and Senior Building is the proposed, second phase of new construction rental housing located at the corner of Nesbit Road and U.S. Route 50 in Grasonville, Maryland. The project is being developed by the experienced developer team of Green Street Housing and TM Associates Development, Inc.

Phase II development will consist of 66 townhouses in one, two, and three bedroom homes. Rents will be restricted to 60 percent and less of the Area Median Income (AMI). The Senior Building will include 54 apartments in a single corridor elevator building, including one and two bedroom units also serving residents making less than 60% of the AMI.

Location

The Village at Slippery Hill is located at the corner of Nesbit Road and U.S. Route 50 in an area of Queen Anne's County that has been designated for future growth. The site is within walking distance of public transportation, community services and the local elementary school. The site is directly across Nesbit Road from the Queen Anne's Emergency Center and Shore Health Pavilion, both important employers and local health care providers. The site's location directly off of U.S. Route 50 on Nesbit Road provides residents with convenient access to local and regional shopping and service opportunities.

Detailed Project Description

Slippery Hill, Phase II will consist of five townhouse structures with a total of 66 units and the Senior Building will have 54 units in one building. The rent will include water, sewer, and trash collection while tenants will be responsible for heat, cooking, water heating, as well as personal electric charges.

Unit Sizes

The unit sizes range from 699 square feet to 1,399 square feet.

Unit Features

All units at the subject will be equipped with a standard in-unit package including a refrigerator, range/oven, dishwasher, microwave, and in-unit washer and dryer. Units will feature closets, storage space, ceiling fans in living rooms and bedrooms, high performance luxury vinyl plank flooring in living rooms and kitchens, cabinets with solid wood doors, vinyl flooring in bathrooms, and ceramic tile bathtub and shower surrounds.

People with Disabilities

A to-be-determined number of units will be set aside to create permanent housing opportunities for non-elderly persons with disabilities (PWD's). Rent and income levels will be restricted to no more than 50% AMI for these units. The project will provide notice of unit availability to and accept tenant referrals from the Department of Health and Mental Hygiene and Maryland Department of Disabilities.

Public Purpose

The Village of Slippery Hill has support from the Queen Anne's County and the Grasonville community. As a testament to their support, in October 2016, the Commissioners of Queen Anne's County unanimously renewed a 40 year PILOT of \$200 per unit per year. The Queen Anne's County Planning Commission expressed their support as recently as September 2016. When requesting a six month extension of the existing site plan for the project, a Planning Commission member moved that the Commission give the project an unsolicited one-year extension instead to make sure CDA understood how much the project was supported by the County. Following numerous public meetings and design charettes with the Greater Grasonville Community Organization, a citizen group in Grasonville, has supported our development efforts.

Absorption Estimate

Several factors indicate that this is a strong market and our absorption estimate is based on the following:

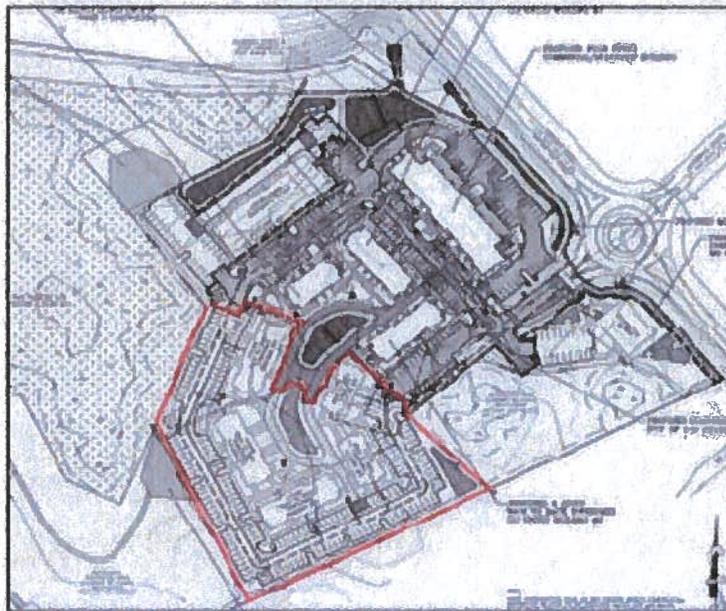
- The market area communities have a low aggregate vacancy rate of 1.4 percent.
- The net demand analysis suggests excess demand for 213 units over the next three years beyond the subject and all pipeline projects.
- The affordability capture rate of 3.9 percent indicates a significant number of income-qualified renter households in the market. Further, 32.8 percent of households are rent overburdened, paying more than 40 percent of their income to housing.
- The proposed subject is well positioned with regard to location, unit size, unit features, and community

amenities, as well as pricing and income targeting relative to the Slippery Hill II Market Area.

- Most of the rental communities surveyed are older properties; four properties were recently built in the subject county or neighboring county.
- As noted, three properties have recently completed initial lease up in the Slippery Hill Market Area. Willows at Centreville, a tax credit community, averaged an absorption pace of 12 units per month during a rolling delivery. Chesapeake Village Center (Phase II), a market rate second phase, had an average absorption pace of six units per month. The Promenade at Red Apple Town Center, a market rate community, had an estimated average absorption pace of roughly 10 - 12 units per month for the first 100 units.
- The Slippery Hill Market Area's population and household bases are expected to continue steady growth over the next five years.

Site Access & Amenities

Vehicular access to the site will be via one entrance at the traffic circle on Nesbit Road which also serves the Emergency Center across Nesbit Road. Though sidewalks along Nesbit Road are not being provided due to pedestrian safety concerns, sidewalks will be provided throughout the site serving all buildings and a bus stop will be constructed on an interior accessible route to provide a future site for a permanent public transportation stop.



Source: Green Street Housing



Property Features

The property will include a number of features that will be available to all residents of the building. They will include:

Community Center. There will be a Community Center adjacent to the rental office. It will have a TV and lounge like furnishings. This space will have meeting areas for the implementation of the tenant service plan.

Kitchen. Adjacent to the community center will be a community kitchen that can be used for parties and other get togethers.

Business Center. A business center with desktop computers, a printer, fax machine and Internet access will be located adjacent to the rental office and will be available to all residents.

Fitness Center. In the second phase a new fitness center and social service office will be added to the features.

Playground. A modern playground will be erected adjacent to the residential buildings and the center courtyard serving those buildings. The playground will be accessible and feature high quality, safe playground equipment.

Picnic Area. An accessible picnic area with picnic tables will be provided adjacent to the playground.

Common Area Security Camera System. An Internet based security camera system that covers all common areas will be installed to ensure the safety of all residents, visitors and staff.

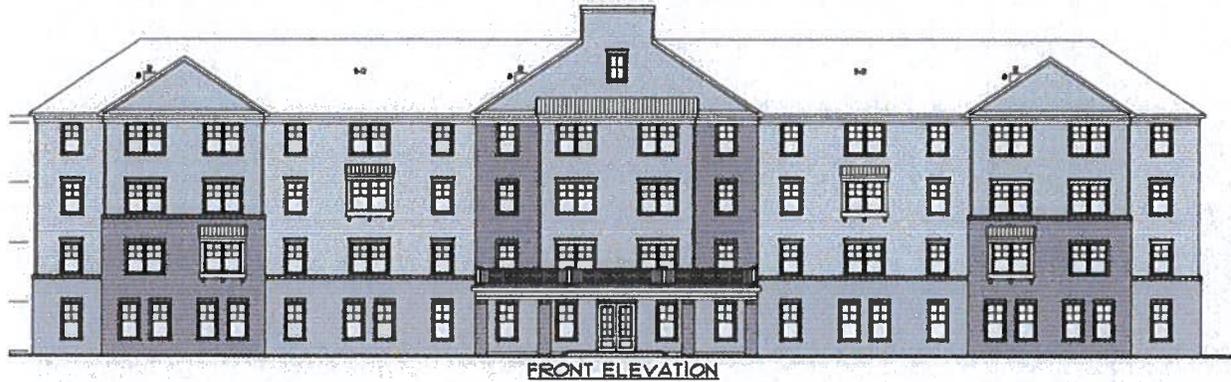
Covered Bus Stop. An accessible, covered bus stop will be constructed near the entrance of the property to provide a common boarding point and shelter for school children waiting for school buses and to provide a permanent public bus stop once the community is constructed.

War of 1812 Monument. A monument in the form of a bronze statue, commemorating the Battle of Slippery Hill which took place nearby, will be erected in the center courtyard of the parking area between the mixed use building and residential buildings.

Development Team

The development team consists of a highly qualified group of professionals that all have experience with CDA programs. The developers are Green Street Housing, LLC and TM Associates Development, Inc. The general contractor is GGI Builders, Inc. T/A Gillis Gilkerson. The property management company is TM

Associates Management, Inc. The architect is Architecture by Design, a certified WBE. The civil engineer is Lane Engineering. The design team will use the services of Pando Alliance for energy consulting, a certified WBE. The Housing Authority of Queen Anne's County, a regional public housing authority, will be a member of the general partner with 11% ownership and will assist with the tenant service plan.



A RESOLUTION OF THE COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY TO APPROVE PROVIDING A PAYMENT IN LIEU OF TAXES (PILOT) TO THE DEVELOPMENT OF RENTAL HOUSING, LOCATED ON NESBIT RD. IN GRASONVILLE, MD.

WHEREAS, Queen Anne's County recognizes that there is a significant need for quality family and senior housing units in Grasonville for persons with low or to moderate incomes; and

WHEREAS, Green Street Housing, LLC, a Maryland limited liability company or its assignee, proposes to develop and operate a rental housing development known as The Village at Slippery Hill, located on Nesbit Road in Grasonville, MD (the "Project"), all or a portion of which will assist persons of lower income as required by applicable law or regulations; and

WHEREAS, Green Street Housing, LLC has advised the County that the financing from the Maryland Department of Housing and Community Development's (the "Department") Low Income Housing Tax Credit (the "LIHTC") Program warrants a contribution to the project in the form of a payment in lieu of taxes (PILOT); and

WHEREAS, Queen Anne's County supports this project because it will address the need for quality affordable housing for persons with lower incomes;

WHEREAS, Queen Anne's County authorized a Payment in Lieu of Taxes (the "PILOT") subject to Resolution 14-10 adopted May 13, 2014 Resolution 16-73 adopted October 11, 2016 to reduce Queen Anne's County real estate taxes in the amount of \$200 per unit per year if the Project continues to provide affordable housing for persons of lower income for a period of forty (40) years;

WHEREAS, Queen Anne's County desires to provide a Payment in Lieu of Taxes (the "PILOT") subject to Resolution 14-10 adopted May 13, 2014 Resolution 16-73 adopted October 11, 2016;

WHEREAS, Queen Anne's County desires to provide a deeper level of financial support to the senior housing portion of the project by reducing the Queen Anne's County real estate taxes in the amount of \$400 per unit per year if the Project continues to provide affordable senior housing for persons of lower income for a period of forty (40) years;

BE IT FURTHER RESOLVED THAT Queen Anne's County approves one or more PILOT agreements between Green Street Housing, LLC or its assignee and Queen Anne's County, attached hereto, provided Green Street Housing or its assignee constructs and operates a rental housing project on Nesbit Road for persons with low to moderate income in accordance with the guidelines of the Department and the LIHTC restrictive use covenants. The PILOT agreements provides for a reduction of Queen Anne's County real estate taxes in the amount of \$200 per unit per year, and in the amount of \$400 per unit per year for a senior housing, if the project continues to provide affordable housing for persons of lower income for a period of forty (40) years from the date the buildings are granted a certificate of occupancy; and

BE IT FURTHER RESOLVED THAT, the County Administrator be granted the authority to execute said Payment in Lieu of Taxes agreements, which is hereby attached to this resolution, on behalf of Queen Anne's County; and,

READ AND PASSED THIS _____ day of _____, 202016.

ATTEST

THE COUNTY COMMISSIONERS OF
QUEEN ANNE'S COUNTY

Name
Title

Name, Title

ATTEST/WITNESS

COUNTY ADMINISTRATOR
OF QUEEN ANNE'S COUNTY

Name
Title

Name



**Queen
Anne's
County**

**THE COUNTY COMMISSIONERS OF
QUEEN ANNE'S COUNTY**

The Liberty Building
107 North Liberty Street
Centreville, MD 21617

County Commissioners:

James J. Moran, At Large
Jack N. Wilson, Jr., District 1
Stephen Wilson, District 2
Philip L. Dumenil, District 3
Christopher M. Corchiarino, District 4

e-mail: QACCommissioners&Administrator@qac.org

County Administrator: Todd R. Mohn
Executive Assistant to County Commissioners: Margie A. Houck
County Attorney: Patrick Thompson, Esquire

May 12, 2020

Secretary Kenneth Holt
Maryland Dept. of Housing & Community Development
7800 Harkins Rd
Lanham, MD 20706

RE: Village at Slippery Hill
Support for LIHTC Financing

Dear Secretary Holt:

The Queen Anne's County Division of Housing and Community Services (DHCS) has reported about the severe need for affordable senior and family rental housing in Queen Anne's County. Most recent studies viewed by DHCS staff have shown the percentage of rental properties in Queen Anne's County is 17.1%. By contrast the average ratio for the State of Maryland is 30% and the surrounding counties of Anne Arundel (25.8%), Caroline (27.8%), Kent (28.9%) and Talbot (27.9%) all have higher ratios of rental stock. The lack of rental housing affects our low income citizens the most. That is because the rents charged for the rental housing that is available is high; often above the typical market rates. Therefore our county's low and even median income workers and citizens cannot afford to rent in Queen Anne's County.

Recent market studies have indicated that there is excess demand for rental housing in the Grasonville market area of over 200 units and an overall vacancy rate of 1.2%, which equates to 4 vacant units out of 334 units.

The Commissioners have provided support to Green Street Housing in its pursuit to develop the Village at Slippery Hill as an affordable rental housing development since 2012. The county has committed to providing each phase of development a Payment In lieu of Taxes (PILOT) equal to \$200 per unit for a 40 year term in addition to a waiver of impact fees.

As we write this letter of support, the first phase of the project is nearing completion. We continue to support the subsequent phases of development. Recognizing that resources are scarcer for the financing of senior housing; the Commissioners have recently approved a more impactful PILOT of \$400 per unit so that the development of the senior housing can proceed at the same time as the second phase of family housing.

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The Queen Anne's County Commission has stepped up to address concerns of lack of affordable workforce housing. We urge the Department to support the continued development of the Village at Slippery Hill by its continued commitment of financing resources.

Sincerely,

QUEEN ANNE'S COUNTY
BOARD OF COUNTY COMMISSIONERS

James J. Moran, President

Jack N. Wilson, Jr.

Stephen Wilson

Philip L. Dumenil

Christopher M. Corchiarino



Queen Anne's County

DEPARTMENT OF PLANNING & ZONING

110 Vincit St., Suite 104
Centreville, MD 21617

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Fax Planning: (410) 758-2905
Telephone Permits: (410) 758-4088
Fax Permits: (410) 758-3972

County Commissioners:

James J. Moran, At Large
Jack N. Wilson, Jr., District 1
Stephen Wilson, District 2
Philip L. Dumenil, District 3
Christopher M. Corchiarino, District 4

ACTION ITEM

MEMORANDUM

DATE: 14 APRIL 2020
TO: COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY
MIKE WISNOSKY, PLANNING DIRECTOR
FROM: AMY G. MOREDOCK, PRINCIPAL PLANNER
SUBJECT: 2020 COMPREHENSIVE PLAN UPDATE – REPLACEMENT CONSULTANT
REQUEST TO HIRE CONSULTANT TO CONTINUE THE PLAN UPDATE

Having terminated its contract with Smith Planning and Design (SPD) on 2 March 2020, the County must select a firm to continue and complete the 2020 Update of the Comprehensive Plan. To that end, staff reached out to the firm whose proposal was identified in September 2019 by the Selection Committee as the second choice to complete the project. That firm, Wallace Montgomery & Associates, LLP (WM), was briefed on the status of the County's update and was excited to discuss the possibility of submitting an updated proposal for reconsideration. Staff has received and reviewed that revised proposal and has found that puts forward a complete and professional process for the successful continuance and completion of the 2020 Comprehensive Plan Update.

The original and revised proposal is thorough in its response to the RFP Scope of Services, Deliverables, and Key Roles and Responsibilities. WM has outlined a full-bodied schedule of public meetings, as well as web-based outreach opportunities (managed by the Company). WM outlines complete management of the project and a mechanism for reporting to key staff and stakeholders.

While this was not a key factor in the selection process, it is worth noting that WM also put forward the second lowest proposed fee (which remains so). In light of the Governor's Executive Orders surrounding the COVID-19 pandemic and a need identified by the Planning Commission, WM has revised its proposal by increasing the number of meetings and workshops, as well as the timeframe for successful completion of the project. In consideration of the deliverables received from SPD, WM has decreased the overall budget from \$258,975.94 to \$257,635.94 (please see the attached *REVISED Project Fee & Schedule* for details on these alterations).

The FY2020 budget allocation for the Comprehensive Plan totals \$250,000.00 for consultant services (see attached Project Transition Analysis). Therefore, a budget adjustment is hereby requested to cover the cost of project completion. Please note, the County received 4 proposals in response to the RFP; only one proposal put forward a budget within the County's FY2020 budget allocation.

In accordance with the 2020 Comprehensive Plan Proposal Selection Committee ranking of proposals received, we now recommend that the County Commissioners of Queen Anne' County hire Wallace Montgomery & Associates, LLP and enter into a contract for their services to update the 2020 Queen Anne's County Comprehensive Plan.

RECOMMENDED ACTION:

I move that the County hire Wallace Montgomery & Associates, LLP and enter into a contract for their services to update the 2020 Queen Anne's County Comprehensive Plan and authorize Planning Director Mike Wisnosky to sign the contract on behalf of the County Commissioners. I further move that the County adjust its budget to accommodate this contract.

**CONTRACT FOR PROFESSIONAL SERVICES
FOR
QUEEN ANNE'S COUNTY COMPREHENSIVE PLAN 2020**

THIS CONTRACT, made and entered into this _____ day of _____, 2020, by and between the "COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY," hereinafter referred to as the "COUNTY," and WALLACE MONTGOMERY & ASSOCIATES, LLP, a financially secure Maryland certified firm, having offices located at 222 S. DuPont Highway, Suite 202, Dover, DE, hereinafter referred to as the "CONSULTANT."

WITNESSETH

WHEREAS, the COUNTY desires to engage the CONSULTANT to perform the professional services described herein; and

WHEREAS, the CONSULTANT represents itself to be professionally competent and capable to perform the services described herein, and certify that it has employed or will employ sufficient professional and qualified staff to complete the work in a timely manner.

NOW, THEREFORE, in consideration of the mutual covenants and conditions contained herein, the COUNTY and CONSULTANT hereby agree as follows:

ARTICLE I – DESCRIPTION OF PROJECT

- 1.1 Upon issuance of Notice to Proceed and receipt of a signed and executed copy of the CONTRACT, the CONSULTANT shall render professional services promptly and diligently to complete the project described in the COUNTY'S Request for Proposals and the CONSULTANT'S Scope of Work and Services defined in the Appendices attached hereto and incorporated herein by this reference. The SCOPE OF WORK AND SERVICES, the PROJECT SCHEDULE, and the PROJECT BUDGET are completely defined as the CONTRACT DOCUMENTS contained in the attached Appendices consisting of the CONSULTANT'S PROPOSAL titled *Proposal: Comprehensive Plan Update 2020 (received 13 September 2019)* and *REVISED Project Fee & Schedule (received 23 April 2020)* referenced as Appendix 1, the COUNTY'S Request for Proposals (RFP) dated 12 July 2019, referenced as Appendix 2, and the CONSULTANT'S Schedule and Fee as outlined in Appendix 1, which are hereinafter collectively referred to as the PROJECT. If a conflict exists among or between any of the CONTRACT DOCUMENTS, the precedence of documents shall be: this Contract for Professional Services, then Appendix 1, and finally Appendix 2.
- 1.2 Subcontracting. No substitution of subcontractors or key personnel shall be permitted for any of the CONTRACT services without the express written approval of the COUNTY.

ARTICLE II – SCOPE OF PROFESSIONAL SERVICES

The CONSULTANT agrees to provide professional services in accordance with the PROJECT and the following requirements:

- 2.1. The CONSULTANT shall be responsible for the completeness and accuracy of all services rendered and correction of all significant errors of omission or commission of any drawings, illustrations, text, maps, or other documents required by this agreement to be provided by the CONSULTANT, notwithstanding prior approval by the COUNTY.
- 2.2. The CONSULTANT agrees to render professional services promptly and diligently upon execution of this CONTRACT between the COUNTY and the CONSULTANT.
- 2.3. The CONSULTANT will meet with the COUNTY as specified in the PROJECT.
- 2.4. The CONSULTANT will be responsible for conducting research, data collection and other work required to complete the project except for those items specifically identified in the PROJECT to be provided by the COUNTY.
- 2.5. The CONSULTANT designates Lauren Good, AICP as its Project Manager.
- 2.6. If so requested by the COUNTY, the CONSULTANT shall submit to the COUNTY's Project Manager a progress report, including work to date indicating the progress made by the CONSULTANT.
- 2.7. The CONSULTANT will provide the COUNTY with the final products as described in the PROJECT.

ARTICLE III – COUNTY'S RESPONSIBILITIES

The COUNTY shall do the following in a timely manner so as not to delay the services of the CONSULTANT:

- 3.1. The COUNTY designates Principal Planner Amy Moredock, CFM as its Project Manager to act as the COUNTY's representative with respect to the services to be rendered under this CONTRACT.
- 3.2. The COUNTY or its representative shall receive and examine documents submitted by the CONSULTANT, and render decisions and authorizations promptly to prevent unreasonable delay in the progress of the CONSULTANT'S services.
- 3.3. The COUNTY shall assist the CONSULTANT by placing at the CONSULTANT'S disposal all available COUNTY-generated information and data pertinent to the PROJECT and gathering existing COUNTY-generated information required by CONSULTANT to perform the tasks outlined by the PROJECT.



3.4 The COUNTY shall give prompt notice to the CONSULTANT whenever the COUNTY observes or otherwise becomes aware of any development or issue that affects the scope or timing of CONSULTANT services or becomes aware of any fault or defect in the project or non-conformance with this CONTRACT.

ARTICLE IV – PERIOD OF SERVICES

- 4.1 The period of performance hereunder shall be as set forth in the Project Schedule contained in the PROJECT.
- 4.2 Neither party shall hold the other party responsible for damages or delay in performance caused by Acts of God or that arise from any events reasonably beyond the control and without the fault or negligence of the other.

ARTICLE V – BACKGROUND MATERIAL AND REUSE OF DOCUMENTS

- 5.1 If required by the COUNTY, the CONSULTANT shall deliver to the COUNTY any and all background material prepared or obtained by the CONSULTANT incidental to the performance of this CONTRACT. Background material includes, but is not limited to original work, papers, notes, and drafts prepared by the CONSULTANT and items such as completed questionnaires, materials in electronic data processing form, maps, drawings, photographs, and other printed materials acquired by the CONSULTANT during the term of this CONTRACT and directly related to the services being rendered under this CONTRACT.
- 5.2 All documents prepared or furnished by the CONSULTANT pursuant to this CONTRACT are instruments of service in respect to the PROJECT and become the property of the COUNTY. The COUNTY, its respective officers, agents, and employees may make and retain copies of information and reference in connection with the PROJECT. Any reuse without written verification or adaptation by CONSULTANT for the specific purpose intended will be at the COUNTY’s sole risk and without liability or legal exposure to the CONSULTANT.

ARTICLE VI – PAYMENT FOR SERVICES

The CONSULTANT shall be paid for their services by the COUNTY in accordance with the following:

- 6.1 Payment – In consideration of the performance of the services described in the PROJECT, provided all work is performed in a manner consistent with the level of care and skill ordinarily exercised by members of the profession currently practicing in the CONSULTANT’s field, the COUNTY shall pay the CONSULTANT a total project fee of \$257,635.94 as set forth in Appendix 1. Payments shall be made on a monthly basis pursuant to an invoice indicating the percentage of completion of each of the work tasks identified. Upon receipt of each invoice, the COUNTY shall pay the balance due within thirty (30) days.



6.1.1 If invoices are not paid within sixty (60) days, accounts will be considered delinquent. The CONSULTANT shall provide written notification of a delinquent account to the COUNTY. In addition, the CONSULTANT, may after giving seven (7) days written notice to COUNTY, suspend services under this CONTRACT until CONSULANT has been paid in full all amounts due.

6.2 Payment for Additional Service – Any additional professional services shall only be undertaken when authorized by executed change order or supplemental agreement. The CONSULTANT will be compensated for additional professional services based on an hourly rate or by a lump sum fee as set forth in the CONSULTANT's proposal and mutually agreed upon between the COUNTY and the CONSULTANT.

6.3 The CONSULTANT shall submit final billing to the COUNTY within sixty (60) days from the date of completion of the PROJECT, whichever shall first occur, unless a later date is mutually agreed upon by both parties.

6.4 The COUNTY is not obligated to reimburse the CONSULTANT for any costs incurred by the CONSULTANT either before the effective date of this CONTRACT or after the COUNTY's payment of the final invoice in the total amount of the PROJECT BUDGET as set forth in Section 6.1, except as otherwise provided for in Section 6.2 of this Article.

ARTICLE VII – INSURANCE

7.1 The CONSULTANT shall maintain at its own expense all necessary insurance, including but not limited to professional liability, workmen's compensation, disability, and unemployment insurance, as well as public liability, product liability, property damage, and automobile liability insurance against all losses, claims, demands, proceedings, damages, costs, charges, and expenses for injuries or damage to any person or property arising out of or in connection with this CONTRACT. All such policies shall be in amounts and form satisfactory to the COUNTY and shall provide that they may not be canceled without thirty (30) days advance written notice to the COUNTY.

ARTICLE VIII – CURTAILMENT AND TERMINATION

8.1 The COUNTY may terminate the CONTRACT at any time upon ten (10) days written notice.

8.2 Upon such termination or abandonment, the CONSULTANT shall deliver to the COUNTY all drawings, illustrations, text, maps, data, and other documents entirely or partially completed, together with all unused material supplied by the COUNTY.

8.3 The CONSULTANT shall appraise the work it has completed and submit its appraisal to the COUNTY for evaluation.

8.4 The CONSULTANT shall receive its compensation in full for services performed to the date of such termination, abandonment, or curtailment which shall be a fee for the percentage of work



satisfactorily completed. This fee shall be a percentage of the CONSULTANT'S fee described in this CONTRACT and shall be in the amount to be mutually agreed upon by the CONSULTANT and the COUNTY. The COUNTY shall make this final payment within sixty (60) days after the CONSULTANT has delivered the last of the partially completed documents together with any records that may be required to determine the amount due.

ARTICLE IX – CONFIDENTIALITY AND NON-DISCLOSURE

- 9.1 The CONSULTANT agrees that any work products created in connection with this CONTRACT are for the confidential information of the COUNTY, and neither the CONSULTANT nor any member of the CONSULTANT'S personnel will disclose any of the same to any person whatsoever, other than the COUNTY, its designees or its authorized representatives, except when expressly authorized to do so by the COUNTY, in writing, or when compelled to testify in relation to such report or conclusion under oath in a judicial forum, or as may otherwise be required by law.
- 9.2 All work products prepared by the CONSULTANT under this CONTRACT shall be the property of the COUNTY and shall be delivered to the COUNTY upon completion of Services. Products shall be complete and functional for the purposes intended, except as to any deficiencies, which are due to causes beyond the control of the CONSULTANT. All electronic files shall be submitted in an unprotected format that can be revised or updated by the COUNTY. The CONSULTANT will retain the right to use all work products that are its work for its own business purposes.

ARTICLE X – CONSTRUED UNDER MARYLAND LAW

- 10.1 All services rendered under this CONTRACT and questions that arise concerning the Terms and Conditions of this CONTRACT are governed by the laws of the State of Maryland.

ARTICLE XI – SEVERABILITY

- 11.1 If any part, term, or provision of this agreement, shall be found by a Court to be legally invalid or unenforceable, then such provision or portion thereof, shall be performed in accordance with applicable laws. The invalidity or unenforceability of any provision or portion of any CONTRACT DOCUMENT shall not affect the validity of any other provision or portion of the CONTRACT.



BOTH PARTIES warrant and represent that they have full right, power, and authority to enter into this CONTRACT.

IN WITNESS WHEREOF, the parties have executed this CONTRACT by their duly authorized representatives as of the date first above written.

ATTEST TO:

WALLACE MONTGOMERY & ASSOCIATES, LLP

Lauren Good, AICP
Project Manager

Antonio A. Mawry, PE
Partner

ATTEST TO:

COUNTY COMMISSIONERS OF QUEEN ANNE'S COUNTY

Amy Moredock, CFM
Principal Planner

E. Michael Wisnosky, AICP
Director
Department of Planning and Zoning



Wallace Montgomery (WM) appreciates the opportunity to assist Queen Anne's County with the Comprehensive Plan Update. Based on our review of the RFP and our conversations with Queen Anne's County team members, we are providing this update/revision highlighting some changes to our project services previously submitted in September 2019. As originally submitted, we propose a multi-step planning process for preparing the Queen Anne's County Comprehensive Plan Update. This program entails the following steps:

- Analyzing existing conditions to provide a concise and accurate assessment of strengths, weaknesses, issues, and opportunities
- Fully analyzing the comprehensive plan, as well as other plans and studies
- Establishing a vision for the community as a foundation for future planning efforts
- Formulating goals and objectives
- Preparing final recommendations and implementation strategies that are measurable and specific

Throughout this process we will work closely with County staff and officials to further refine the process to meet specific local needs and requirements, within the established budget for this effort.

COMPREHENSIVE PLAN UPDATE APPROACH

This section reflects the update to our approach based on our understanding of the County's existing Comprehensive Plan and its intent to update this Plan; the County's desire for public outreach; discussions held with County staff; and a review of Smith Planning & Design (SPD) work products provided the County.

We have also provided an updated schedule at the end of document showing a preliminary, high-level timeline with projected task durations and included meetings. Due to the current COVID-19 pandemic, we have not identified specific meeting dates as it is currently unknown when we will again be able to hold in-person meetings but will work closely to complete these effort within the proposed timeframe. The included schedule represents our current anticipated "worst-case scenario."

Task 1 – Project Initiation

A minor change is proposed within Task 1. This change includes the development of the Draft Public Engagement Plan as part of the initiation meeting, formally included in Task 2. This also includes the acknowledgement of the availability of data completed by SPD and the County since the original RFP. *The proposes budget for this task has been increased from \$2,520 to \$3,545.00 based inclusion of the Draft Public Engagement Plan.*

Task 2 – Conditions Analysis & Input

This task has been updated the most based on coordination with the County. The changes mostly reflect further refinement of the task effort as well as incorporation of information received through the SPD work effort. Task 2 focuses on organization and serves as the research, diagnostic, and visioning phase on which the balance of the comprehensive plan work will rely.

The primary change to Task 2 is greater incorporation of the public engagement and public outreach efforts. Some saving is acknowledged for this section which included building upon the survey data and public outreach efforts previously completed by SPD. This effort also has increased to reflect a great number of Planning Commission working sessions as well as an additional Visioning Workshop in the northern part of the County.

In addition, some of the community profile information identified in Task 3 has been moved to occur during Phase 2 as part of the data collection and public engagement efforts. *The task budget for this effort has been increased from \$110,527.66 to \$138,872.66, with most of the hours coming from Task 3.*

Task 3 – Community Assessments

This task has been reduced based on the incorporation of data received from SPD and the County, as well as the transfer of some hour to Task 2 as noted above. *The task budget for this effort has been decreased from \$73,359.72 to \$52,739.72.*

Task 4 – Plan Development

This task has remained relatively unchanged from the original proposal, therefore no changes to the original hours and budget.

Task 5 – Comprehensive Plan Adoption

This task has remained relatively unchanged from the original proposal, therefore no changes to the original hours and budget.

Task 6 – Project Management

This task, which will extend throughout the length of the project, will incorporate the management of the project, including organizing the various staff members and sub-consultants that are part of the WM Team. This also includes time for minor miscellaneous tasks not included under the other task assignments.

We have removed the charges originally included for administrative and record keeping tasks, which are included as part of the previous tasks. As a result, the project budget for the effort has been reduced from \$13,730.00 to \$3,640.00.

BUDGET AND SCHEDULE

The scope of services described in this proposal represents a comprehensive and recommended approach to complete the Queen Anne's County Comprehensive Plan Update. The WM Team understands the level of investment is significant and appreciate the commitment you are making to a process and document that will serve your community for the next 10 years. We will work with you to refine the scope and associated fee if necessary and to identify opportunities for County and volunteer support to bring additional value to the process. While we are confident each of the tasks described are necessary and worthwhile, there may be opportunities to modify them further to meet your budget expectations.

Our revised proposed project fee to reflect the work effort presented and discussed with the County staff is as follows:

Project Fee by Task

		RFP original fee	Revised fee
Task 1	Project Initiation	\$2,520.00	\$3,545.00
Task 2	Conditions Analysis & Input	\$110,527.66	\$138,872.66
Task 3	Community Assessments	\$73,359.72	\$52,739.72
Task 4	Plan Development	\$37,518.56	\$37,518.56
Task 5	Comprehensive Plan Adoption	\$21,320.00	\$21,320.00
Task 6	Project Management	\$13,730.00	\$3,640.00
TOTAL	Overall Project Fee	\$258,975.94	\$257,635.94

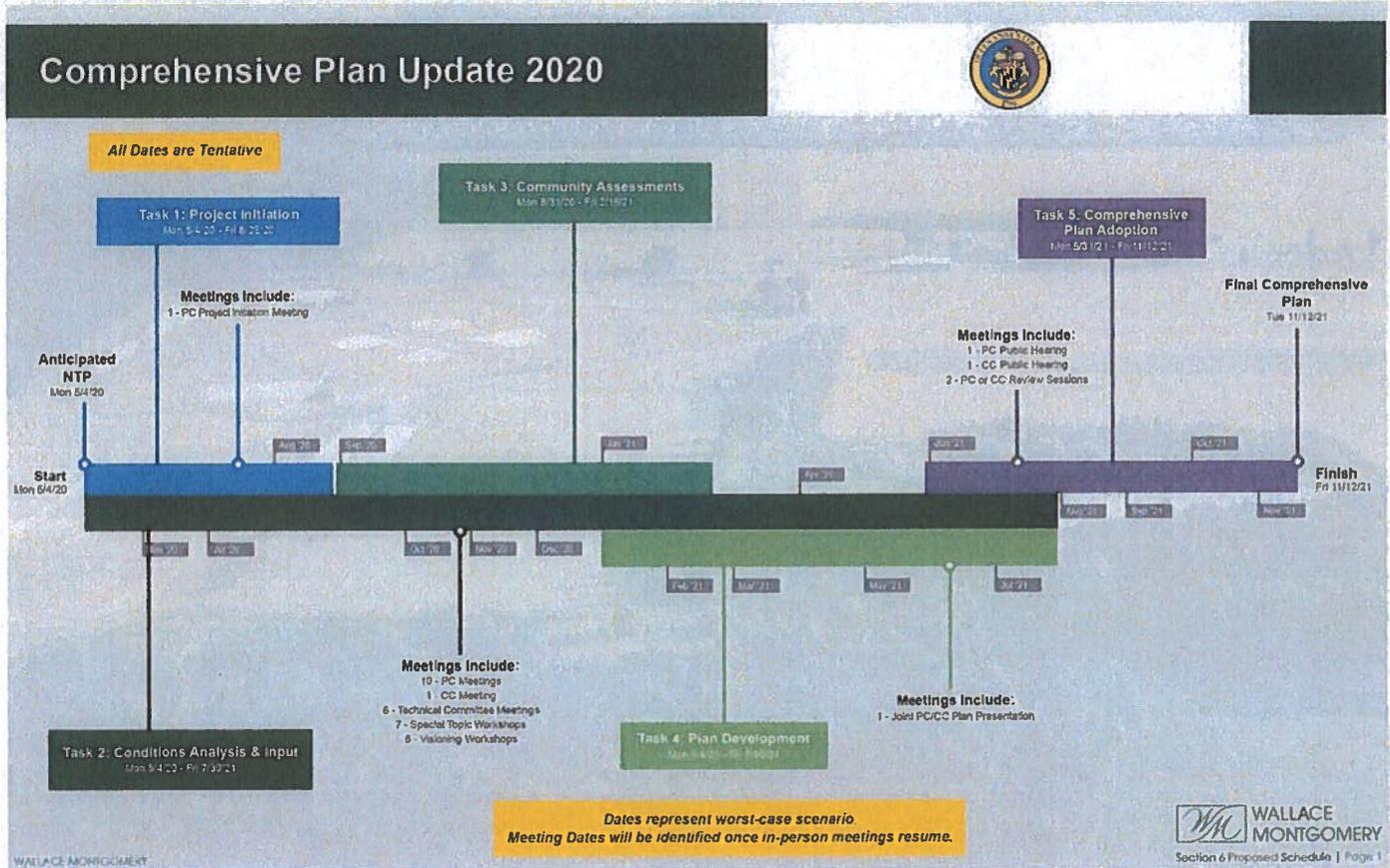
The revised hours for each task are provided below:

HOURS ESTIMATE								
		Associate	Project Manager	Sr. Engineer Planner	Jr. Engineer Planner	GIS Tech	Environ. Analyst	TOTAL
Task 1	Project Initiation							
1.1	Detailed Scope & Schedule	0	4	4	0	0	0	8
1.2	Develop Public Engagement Plan	0	2	2	0	0	0	4
1.3	Project Initiation Meeting	0	4	4	4	0	0	12
Task 2	Conditions Analysis & Input							
2.1	Collect Data & Analyze Existing Conditions	0	24	84	100	48	32	288
2.2	Public Engagement	0	60	84	60	20	12	236
2.3	Evaluate Existing County Vision Statement	0	2	12	8	0	8	30
2.4	Issues and Opportunities Assessment	0	24	36	24	24	8	116
Task 3	Community Assessments							
3.1	Incorporated Jurisdiction Profiles	0	8	8	0	8	0	24
3.2	Community Plans	0	24	68	72	40	4	208
Task 4	Plan Development							
4.1	Comprehensive Plan Framework	0	11	19	11	0	0	41
4.2	Development of Draft Comprehensive Plan	0	16	40	40	24	8	128
4.3	Draft Implementation Elements	0	8	16	16	0	0	40
4.4	Draft Plan Presentation	0	8	8	8	0	0	24
Task 5	Comprehensive Plan Adoption							
5.1	Comprehensive Plan Collateral	0	8	24	24	16	8	80
5.2	Planning Commission Public Hearing	0	6	6	6	0	0	18
5.3	Board of County Commissioners Public Hearing	0	3	3	6	0	0	12
5.4	Final Comprehensive Plan Document	0	8	24	16	16	0	64
Task 6	Project Management							
6.1	Coordination, Invoices, Project Progress Reports & Schedule Updates	0	8	16	0	0	0	24
TOTAL HOURS		0	228	458	395	196	80	1357

PROJECT SCHEDULE

Overall Schedule Changes

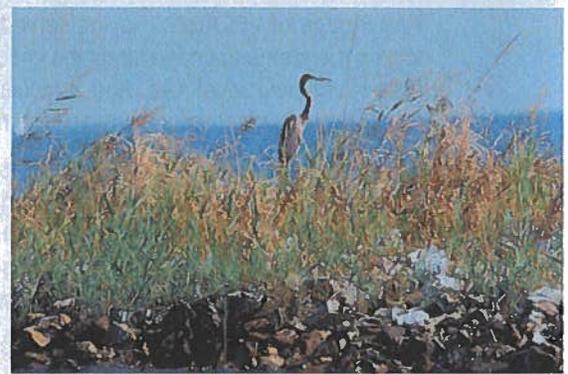
We are proposing a change to the overall schedule so that the planning process will be completed over an 18-month period. We feel that this will better enable us to provide a thorough review and analysis of materials, incorporate a more robust outreach schedule that is more in line with the County's expressed desires, and incorporate results of the 2019 American Community Survey (results due to be released in December 2020) and 2020 Census (results due to be released in spring 2021). This schedule also takes into consideration the current need to limit social interactions, so postpones the beginning of in-person outreach activities until later in the year. Our worst-case anticipated schedule is provided on the next page. We will begin developing a more detailed schedule once NTP is issued. We will revisit the detailed schedule and provide meeting and milestone dates once in-person outreach activities can commence. We will also revisit the schedule should other situations change, such as additional precautions/quarantine needs due to the COVID-19 pandemic. Any schedule changes will be communicated to P&Z staff, the Planning Commission, and the Board of County Commissioners as early as possible. Once the project website is functional, we will include the schedule (and any revisions).



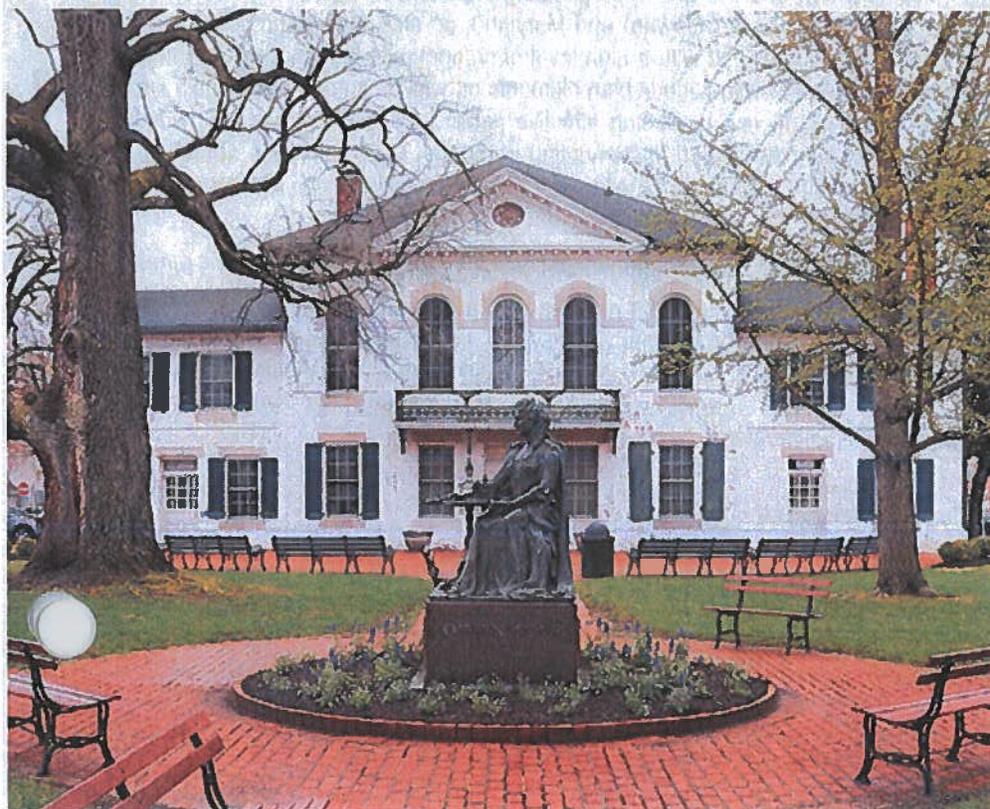


Proposal

Comprehensive Plan Update 2020



**WALLACE
MONTGOMERY**



Copy
September 13, 2019

WALLACE MONTGOMERY
222 S. DuPont Highway, Suite 202
Dover, DE 19901
P: 302.257.3100
F: 302.257.3101



September 13, 2019

Amy G. Moredock, CFM, Principal Planner
Queen Anne's County
Department of Planning and Zoning
110 Vincit Street, Suite 104
Centreville, MD 21617

RE: Comprehensive Plan Update 2020
WM Promo No. 2019-088

Dear Ms. Moredock:

Wallace Montgomery (WM) is excited to respond to this RFP to provide high-quality comprehensive planning services for Queen Anne's County. By selecting the **WM Team**, the County will get an impressive team of seasoned land use, environmental, and transportation planners who will perform the full range of data collection, assessment, inventory, GIS, analyses, and community outreach services required to update the County's 2010 Comprehensive Plan. Working collaboratively with County agencies, the Planning Commission, elected officials, community groups / stakeholders, and citizens, we will update the Comprehensive Plan to establish a blueprint for future development over the next 10 years.

Knowledge of the Area: Having served County and Municipal governments on the Eastern Shore for more than 40 years, **WM** knows the area and understands the critical issues the County faces — such as serving as a major transportation corridor, coastal vulnerability/sea level rise, and agricultural economies — as it balances growth and development with preserving its rural character, abundant natural and cultural resources, and relaxed quality of life.

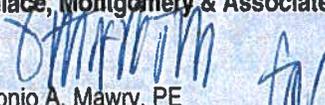
Our Team's knowledge, of and respect for, local government and the dedicated individuals who represent them set us apart from other planning consulting teams. We enjoy working closely with local staff, elected and appointed officials, and stakeholders in the community, and incorporate robust public engagement in all the work that we do. We value partnerships and believe that the combination of our professional expertise and planning experience, enhanced with your local knowledge of issues facing the County, will result in a meaningful, forward-thinking update to your plan that is practical, yet visionary for years to come.

Effective and Experienced Leadership: Our planning services will be managed by **Lauren Good, AICP**. She is a certified planner with 13 years of community, land use, sustainability, and transportation planning experience. Lauren worked on eight comparable comprehensive plan updates for municipal agencies in Delaware and Maryland, so she understands the County's objectives and comprehensive plan update process. She is equipped with a high level of competence in managing inventories, assessments, analyses, GIS, and public participation associated with various plan elements as well as current sustainable smart growth management strategies. Lauren has substantial experience facilitating effective public participation programs; working collaboratively with public officials and citizen advisory committees; and implementing numerous public outreach strategies to obtain constructive input. Queen Anne's County will benefit from Lauren's experience managing downtown and small area plans, sustainability efforts, and her in-depth knowledge of funding source requirements.

Conflict of Interest and Confidentiality Statement: **WM's** signed Conflict of Interest Disclosure form is on the following page.

The enclosed five paper copies and an electronic copy in a PDF format of our proposal further demonstrate our qualifications for the Comprehensive Plan Update 2020 for Queen Anne's County. **WM** (from our Partners to our technicians) is committed to exceeding the County's expectations and quality standards for this contract. If you have questions or need additional information, please contact our Project Manager for this contract **Lauren Good** at 302.232.6965 or vial email at **lgood@wallacemontgomery.com**. Thank you for your consideration.

Sincerely,
Wallace, Montgomery & Associates, LLP


Antonio A. Mawry, PE
Partner

CONFLICT OF INTEREST DISCLOSURE & EMPLOYMENT OF ALIENS STATEMENT

In connection with the undersigned's participation in the bid process or request for proposals being considered by the County Commissioners of Queen Anne's County ("the County") the undersigned does affirm under the penalties of perjury as follows:

I have reviewed the materials provided by the County in connection with my proposed bid or proposal and reviewed such records of my company and business as necessary to make the following statements:

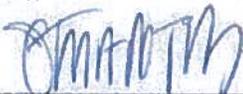
(Check all appropriate boxes)

- To the best of my knowledge and belief, neither I, the company identified below, nor any employee of the company have been involved or are presently involved in any situations or actions that might be regarded as an actual or potential conflict of interest in the event of a successful bid or award.
- It appears that I, the company identified below or an employee of the company have been involved in some situations or actions that might be regarded as a potential conflict of interest should I submit the successful bid or proposal. Details of such situations and/or actions are hereby attached to this form (attach additional sheet(s)).
- The following situations or actions in which I, my company or an employee of the company are presently involved might be regarded as a potential conflict of interest if I submit the successful bid or proposal (attach additional sheet(s)).
- I have attached a list of all present contracts between the company named below and the County.

Furthermore, vendors providing goods or services to Queen Anne's County Government, as a condition of doing business with the County, are required to comply with all applicable laws and regulations relating to the employment of aliens.

Should vendors providing goods or services to Queen Anne's County fail to comply with applicable laws and regulations relating to the employment of aliens, such failure shall constitute a material breach of the vendor's contractual relationship with Queen Anne's County and the County may take all reasonable steps to terminate the County's contractual relationship with the vendor. If you have questions, please consult the County Department that manages your vendor contract.

Notice of reporting requirements – Any person doing business with a government entity may be subject to the political contribution reporting requirements of Title XIV of the Election Law Article of the Annotated Code of Maryland.

Signature:  Date: September 13, 2019

Name: (please print) Antonio A. Mawry, PE

Company/Organization: Wallace, Montgomery & Associates, LLP

Address: 222 S. DuPont Highway, Suite 202, Dover, DE 19901

Phone Number: 302.257.3101

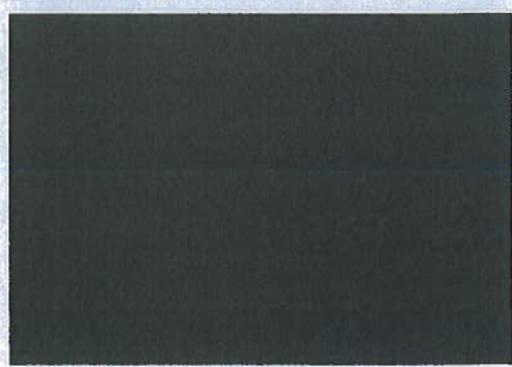
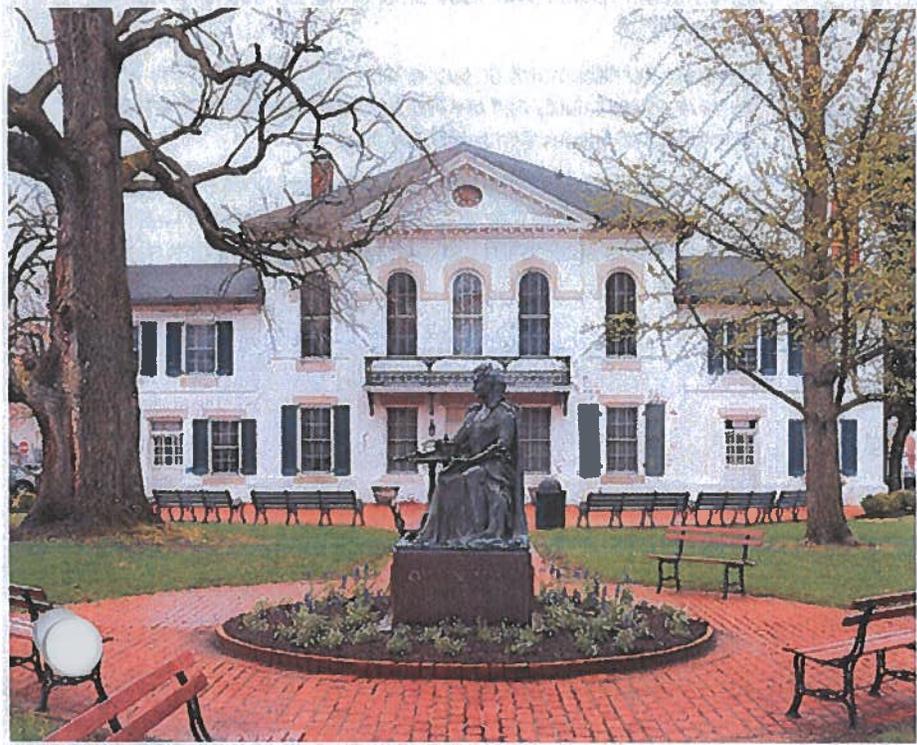
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Section 1

Wallace Montgomery Company Profile





Wallace Montgomery Company Profile

Comprehensive Plan Update 2020 | Queen Anne's County, Maryland

FIRM NAME, BUSINESS ADDRESS, PHONE NUMBER AND EMAIL ADDRESS

Name: Wallace, Montgomery & Associates, LLP
Address of Headquarters:
 10150 York Road, Suite 200
 Hunt Valley, MD 21030
Phone Number: 410.494.9093
Fax Number: 410.667.0925
E-mail Address: amawry@wallacemontgomery.com

BUSINESS LOCATION

This project will be managed from our Dover, Delaware office — less than an hour from Queen Anne's County government offices — with support from our Hunt Valley, Maryland office.

Address:
 222 S. DuPont Highway, Suite 202
 Dover, DE 19901
Phone Number: 302.232.6965
E-mail Address: lgood@wallacemontgomery.com

TYPE OF OWNERSHIP AND PARENT COMPANY

WM is organized as a limited liability partnership with four Partners. Each Partner is responsible for several practice areas providing hands-on technical, business development, and administrative leadership. The firm is not owned by a parent company nor does it own affiliated or subsidiary firms.

OFFICERS OF THE FIRM

Antonio A. Mawry, PE	Partner	<ul style="list-style-type: none"> ▪ Highway/Transit ▪ Planning ▪ Environmental ▪ Pavement Mgt. ▪ Survey
Stuart B. Taub, PE	Partner	<ul style="list-style-type: none"> ▪ Water Resources ▪ Utilities
Matthew J. Allen, PE, PTOE, CCM	Partner	<ul style="list-style-type: none"> ▪ Traffic ▪ Construction Mgt. ▪ GIS ▪ CADD
David L. Borusiewicz, PE	Partner	<ul style="list-style-type: none"> ▪ Structures

YEAR ESTABLISHED AND FORMER NAMES OF THE FIRM

Year the Firm was Established: 1975
Former Names of the Firm: Duffy, Montgomery & Associates, 1975-1985

FIRM'S BACKGROUND

Longevity: Established in 1975, WM has steadily grown into a multidisciplinary planning, engineering, and construction management firm with 240 planners, environmental scientists, engineers, technicians, surveyors, and inspectors practicing from five offices in Maryland, Delaware, Virginia, and Pennsylvania. We apply 44 years of lessons learned to a wide range of planning, environmental, and civil and transportation infrastructure projects for local and state agencies in the Mid-Atlantic US.

In 2007, we expanded our services to include a planning practice, which focuses on an inclusive approach based on a smart growth philosophy; local land use; growth trends; and vehicular, transit, bicycle, and pedestrian needs.

As our department has grown, we now have AICP-certified planners collaborating with engineers and environmental scientists to further understand and provide the services necessary for a full comprehensive planning approach.

Financial Stability: With annual gross receipts of \$34.6M in 2018, WM has the financial resources to provide all the services required to update the County's Comprehensive Plan. In 2019, *Engineering News Record* ranked WM #392 among the top 500 engineering firms in the US.

There are no debarment or suspension actions against the firm. We have no tax liability and are in good standing with the Maryland Department of Assessments and Taxation.

Furthermore, we have Professional Liability Insurance coverage in the amount of \$5M and maintain Comprehensive General Liability, Comprehensive Automobile Liability, and Worker's Compensation Insurance.

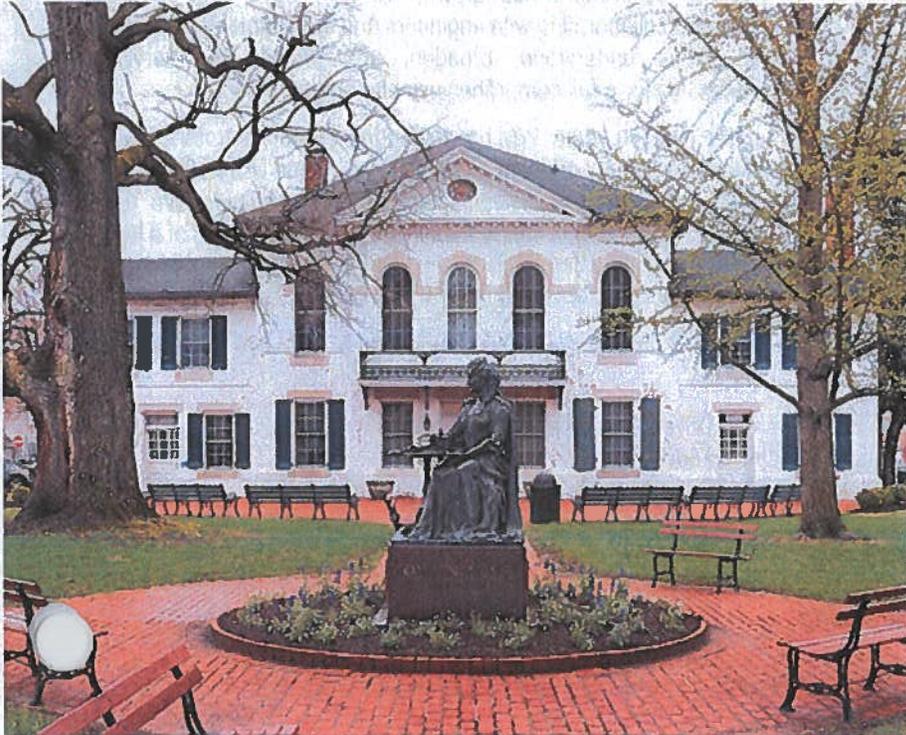
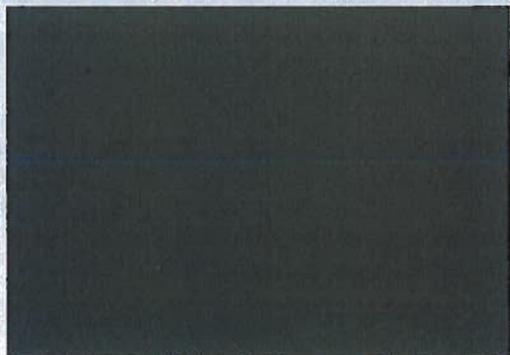


Section 2

Wallace Montgomery Project Team



**WALLACE
MONTGOMERY**



Teamwork and collaboration are crucial to good planning. We have assembled a team of industry leaders to assist Queen Anne's County in the Comprehensive Plan update, but most importantly, we have assembled a team of collaborators to work with the community throughout this endeavor. **Wallace Montgomery (WM)**, Heritage Strategies, and Remline bring together a unique professional perspective and experience while capitalizing on overlapping skillsets that highlight our collective strengths and will serve Queen Anne's County throughout the life of this project. Our Team members share the same core values when it comes to community planning and design; we strive to bring out the distinct character and qualities that make Queen Anne's County a special place, and we do so by working with you, not just for you. We view the community as part of our Team and look to local planning staff, elected and appointed officials, and commission members to collaborate on the vision, values, and ultimate future of the County.

MEET THE WALLACE MONTGOMERY TEAM

The **WM** Team appreciates the opportunity to provide comprehensive planning and public outreach services to Queen Anne's County and offer our knowledge and experience for the Comprehensive Plan Update 2020 project. The **WM** Team has extensive experience in comprehensive planning and related services and includes creative and innovative specialists who can provide practical recommendations for land use, sensitive areas and natural resources, historic and cultural preservation, economic development and tourism, housing, community facilities, and transportation.

WM's project success is dependent on our highly skilled and reputable team. Our Team can meet the high-quality standards that **WM**, Heritage Strategies, Remline, and Queen Anne's County each have for project success. We have established a positive working relationship and can attest to our record of excellent performance.

Our commitment to enriching the community is the result of a multi-faceted practice and fully collaborative vision based on comprehensive planning principles honed through decades of research and practice. Chief among these principles is engagement with diverse, often competing stakeholders. Our expertise in consensus-building allows us to maximize a project's potential and add value, while exceeding a clients' expectations.

Our principles also include providing clients with a wealth of information and integrated services that bring holistic solutions to complex situations. With every project, we apply our demonstrated planning expertise, context sensitivity, and skills in interdisciplinary engagement to develop recommendations that are both appropriate to environmental and historical context, as well as being highly implementable.

Wallace Montgomery | Prime Consultant

WM is a multi-disciplinary planning and engineering firm and a recognized leader in project planning, engineering design, and construction management. Headquartered in Hunt Valley, Maryland, and with offices in Dover and Newark, Delaware, **WM** has been serving public agencies throughout the Mid-Atlantic since 1975. **WM** currently has a staff of more than 240 professional planners, engineers, environmental scientists, technicians, and support personnel. We have been a partner with many of Maryland's Eastern Shore communities over the last 44 years, delivering projects in planning and design.

Recognizing a need to better serve our clients, **WM** created the Transportation and Comprehensive Planning Department in 2007, with a focus on meeting short-, mid-, and long-term needs by providing a comprehensive look at community needs as they relate to local comprehensive plans and projects for municipalities, towns, and counties. Our department also evaluates and plans for statewide and regional needs, working with state departments of transportation and regional metropolitan planning organizations.

Starting with a focus on transportation, the department concentrated on an inclusive approach to providing transportation solutions based on a Complete Streets philosophy; local land use; growth trends; and vehicular, transit, bicycle, and pedestrian needs. Based on our local experience, we understand the financial constraints and community issues and provide context-sensitive and implementable solutions.

As our department has grown, we now have AICP-certified planners collaborating with engineers and environmental scientists to further understand, broaden, and provide the services necessary for a full comprehensive planning approach.

In the past ten years, **WM** has expanded its reach across the Mid-Atlantic region by opening offices in Newark and Dover, Delaware; Mechanicsburg, Pennsylvania; and Vienna, Virginia. We offer public agency clients the human and technical resources of a large multi-disciplinary firm with the excellent customer services of a small firm, complemented by a local presence.

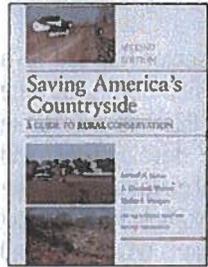
With **WM's** experience, the County can be assured that our work will be:

- Driven by data and knowledge
- Founded on community vision
- Compelling, sustainable, and implementable
- Sensitive to place and context
- Inclusive and engaging

Heritage Strategies, LLC | Historical and Cultural Resources



WM selected Heritage Strategies—a certified small woman-owned business—to be on our Team because of the knowledge and expertise of the firm's historical preservation and land conservation expert, A. Elizabeth Watson, FAICP, a longtime resident of the Eastern Shore. WM and the County will benefit from her extensive knowledge of the area (including Queen Anne's County) and her passion for preserving the area's significant cultural landscapes and historical resources.



Elizabeth's experience includes comprehensive and preservation planning. She has been the part-time executive director of the Stories of the Chesapeake Heritage Area on Maryland's Eastern Shore since 2002. She is also the co-author of *Saving America's Countryside: A Guide to Rural Conservation*, which grew out of her experience working for the National Trust for Historic Preservation's Rural Program. In addition, she is the co-producer of the award-winning film made for the Chesapeake Bay Foundation, *Chesapeake: Living Off the Land*.

With Elizabeth on our Team, the County can be confident that we will meet the following goals:

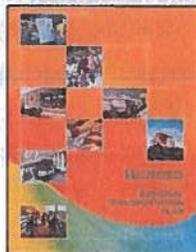
- Identifying cultural landscapes and historic resources, including character-defining patterns and features
- Analyzing issues and opportunities
- Developing actionable goals and strategies to guide preservation / conservation for the next decade and into the future

Remline | Public Outreach, Document Layout & Graphics Support

REMLINE Marketing Services Remline was selected to be on the WM Team because of the firm's outstanding reputation for planning and implementing customized, targeted, and creative public outreach programs as well as their proven ability to design and develop effective, interesting, and reader-friendly documents, reports, and graphics.

Over the last 36 years, Remline—a certified woman-owned business—has become a preferred go-to public outreach and communications firm for supporting planning and infrastructure design projects for public agencies in Maryland and Delaware. They have completed the following representative projects:

- **Visualize 2045 Long-Range Transportation Plan** for the National Capital Region, Metropolitan Washington Council of Governments – Developed a comprehensive media strategy that was successful at obtaining input from diverse audiences and ethnicities, including groups that



may be hard to reach through other methods and designed the 55-page, graphically engaging plan document

- **2040 Regional Transportation Plan and 2050 Regional Transportation Plan**, Wilmington Area Planning Council
- **2040 Maryland Transportation Plan and Maryland Bicycle and Pedestrian Plan**, MDOT
- **2018 Strategic Plan**, Maryland Transportation Authority



Remline created interesting graphics in multiple languages to reach diverse audiences for the Visualize 2045 Long-Range Transportation Plan.

Based on this experience, Queen Anne's County can rely on Remline and the WM Team to develop an effective public outreach strategy — within the County's budget — specifically customized to reach a diverse participant pool:

- Residents in towns and agricultural and waterfront communities
- Skilled workforce
- Residents and visitors who enjoy the County's outdoor recreation and natural resources

Part of the strategy will involve developing eye-catching graphics and maps for the Planning Department's website and other social media tools. In addition, the County can rely on Remline and the WM Team to produce a final planning document that is reader-friendly; easy to navigate; and contains interesting infographics.

TEAM STRUCTURE

Our project team for the Queen Anne's County Comprehensive Plan Update includes professionals with specialized expertise in all areas of comprehensive planning; transportation planning; downtown and corridor planning; neighborhood and special area planning; zoning; environmental planning; historic and cultural resources planning; economic development; utilities planning; community involvement, outreach, and engagement; and implementation strategies. The planning professionals proposed for this project have been specifically assembled to provide Queen Anne's County with a responsive, effective, creative, and specifically unique plan for this important assignment.

The WM Team enjoys a history of building solid, long-term relationships, resulting in a high number of repeat clients and yielding consistently successful projects. With each of these relationships, our Team works closely and in coordination with our clients. We work diligently to understand the project scope, listen carefully to understand the issues impacting the project, and

employ our expertise and experience to develop appropriate and effective solutions.

The **WM** Team will provide Queen Anne's County with a full-service team focused on delivering a quality Comprehensive Plan in an efficient, cost-effective, and innovative way, developing the project so that the recommendations made can be implemented.

Our Team structure is broken down into the following disciplines:

- Land Use – land use, community development, housing, and economic development
- Water Resources – water and wastewater infrastructure, and stormwater management
- Environmental – environmentally sensitive areas, priority preservation areas, historic and cultural preservation
- GIS / Graphics
- Transportation
- Public Outreach

The **WM** Team has the capacity, resources, technical expertise, and experience with local government contracts to provide high-quality deliverables on-time and within budget. Our organizational structure mirrors the scope of work as described in the RFP; it maximizes our responsiveness and flexibility by enabling us to execute multiple tasks simultaneously and efficiently.

The **WM** Team organizational chart appears on the following page. It shows our key personnel and support staff who will be active on this project. The key staff are the team members who will serve in leadership roles for this project.

WALLACE MONTGOMERY TEAM PROJECT MANAGER

Lauren Good, AICP will serve as **Wallace Montgomery's** Project Manager and Lead Land Use Planner. Lauren is a Project Manager in **WM's** Transportation and Comprehensive Planning Department and will manage this project by applying her comprehensive planning and public outreach experience along with her expertise in helping local Maryland agencies address their planning needs. Lauren currently serves as the Project Manager for **WM's** comprehensive and land use planning service contracts. Lauren has earned a reputation for providing outstanding service and delivering projects within budget and schedule restraints. Lauren will ensure that the Comprehensive Plan update is delivered consistent with County requirements and expectations.

Lauren has 13 years of experience in public and private sector planning positions. Her areas of specialization include comprehensive planning; downtown revitalization planning; public engagement; zoning maps; conditions inventories and needs analyses; development review; resiliency and sustainability planning; project management; GIS mapping and analysis; ordinances and regulations; permitting; and customer service. Lauren spent seven years working in municipal and county government, managing increasingly complex programs involving current and long-range planning, community development, GIS mapping and analysis, and emergency operations.

Lauren has served on the Executive Board of the Maryland Chapter of the American Planning Association since 2014. She has spoken on a variety of planning related topics at national, state, and regional conferences and routinely facilitates meetings with a wide range of planning participants. She has an MA in Urban and Regional Planning from the University of Illinois at Urbana-Champaign; a BA in Urban Affairs and Planning with concentration in urbanization planning and policy and minor in real estate from Virginia Tech; a BA in Political Science with concentration in legal studies from Virginia Tech; and a Certification in Graphic Design from Auburn University. Lauren has been an AICP-certified planner since 2010.

Lauren's experience working in the public sector has led to a deeper understanding of issues faced by her clients as she transitioned to working in the private sector; this has resulted in greater collaboration in planning, economic development, and resilient strategies between agencies and local governments. She has wide-ranging experience working with stakeholders in project planning and design; facilitating collaboration on policy and planning decisions; along with grant writing and administration.

Lauren will be directly accountable to the Queen Anne's County Project Manager and **WM's** Partner-in-Charge, Tony Mawry, PE.

Speaking

Lauren has spoken at numerous state and regional conferences including Maryland, Delaware, and Illinois state planning chapter conferences. She has also presented at the National Planning Conference in Philadelphia and has participated as a panelist on several speaking engagements in the States of Maryland, Delaware, Virginia, Illinois, and Connecticut.

Activities, Affiliations, Awards

American Institute of Certified Planners

- American Planning Association
- *Chapter Member: Delaware, Connecticut, Illinois, Virginia*
- *Division Member: Sustainable Communities, Small Town & Rural Planning, Transportation Planning*
- *Young Planner's Group Task Force, Northeast Region Rep*

APA Maryland Chapter

- *Treasurer, 2015-present*
- *Activities Committee Co-Chair, 2014-2017*
- *Statewide Representative, 2014-2015*
- *Young Planners Group Chair, 2013-2014*

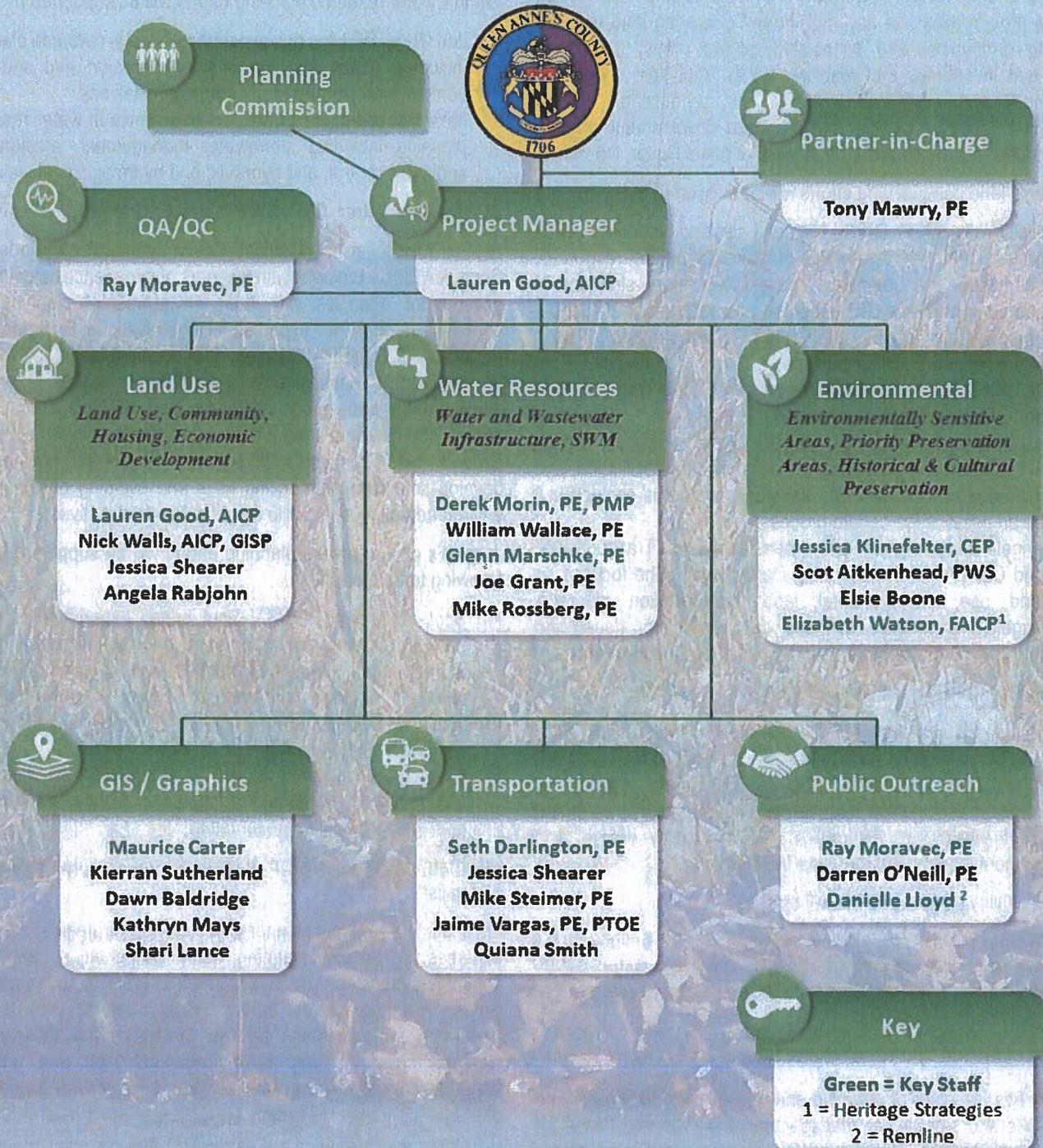
WTS International - *Chapter Member: Baltimore, Philadelphia*

Women Leading Government, DE Chapter– *Communications Committee Member*

Project Management Institute – *Chapter Member: Delaware Valley*

Project Management Institute – *Chapter Member: Delaware Valley*

The WM Team Provides Outstanding Leadership for All Services Required for Comprehensive Plan Update 2020



KEY PERSONNEL

Lauren Good, AICP | Lead Land Use Planner

Lauren is a certified planner with 13 years of experience. She has a clear understanding of the County's objectives and plan update process, since she has updated numerous comparable comprehensive plans for municipal and county governments in Maryland, Delaware, Pennsylvania, and Connecticut as well as several small area and downtown revitalization plans. Lauren also has a proven record of accomplishment preparing land use and zoning ordinances and associated zoning maps; developing condition inventories and resulting needs analyses; completing resiliency and sustainability plans; and conducting build-out analyses based on existing and proposed development patterns and codes. Lauren works primarily out of WM's Dover, DE office.

Lauren's land use planning efforts will be supported by:

- Nick Walls, AICP, GISP | Nick is a certified planner and GIS professional. His knowledge of planning, natural resources, stormwater management, law and regulatory structures—combined with his GIS expertise and technological focus—empower him to solve problems in a comprehensive, cost-effective, and practical manner.
- Jessica Shearer | Jessica is a member of WM's Transportation and Comprehensive Planning Department. She has experience providing land use and related analyses working with state and local agency projects, meeting facilitation, and multi-agency coordination. Jessica's numerous contacts will be an asset to the update process.
- Angela Rabjohn | Angela is a member of WM's Transportation and Comprehensive Planning Department. She focuses on land use, environmental, and transportation planning. Angela's experience includes data collection, developing improvement recommendations, and public involvement.

Derek Morin, PE | Lead Utility Planner

Derek has 22 years of public and private sector experience planning and designing water and sewer projects in Maryland and throughout the Mid-Atlantic region. His broad engineering experience includes water distribution; sanitary sewers; water and wastewater treatment; hydraulics; site and utility design; and environmental permitting for these facilities.

Derek's utility planning efforts will be supported by:

- William Wallace, PE | Bill's career has focused entirely on the planning and design of utilities, including water supply distribution systems, sanitary sewer collection systems, and utility conduit systems.

Glenn Marschke, PE | Lead Water Resources Planner

Glenn has 36 years of planning and design level hydrologic and hydraulic and stormwater management analyses experience for water quality enhancement projects. He conducts these analyses in tandem with planning services; develops designs for stormwater management facilities and best management practices, storm

drains, and erosion and sediment control; floodplain analyses; establishes stream restoration; designs fish passage; and provides wetland mitigation. He manages stormwater management facility inspection and environmental permitting and develops initiatives to reduce nutrient loadings in waterways. Glenn serves as an approved Maryland Department of the Environment technical reviewer for assessing stormwater management and erosion and sediment control plans for their regulatory compliance.

Glenn's water resource planning efforts will be supported by:

- Joe Grant, PE | Joe has experience in water resource planning including stormwater management, erosion and sediment control, and hydraulic and hydrologic analyses.
- Mike Rossberg, PE | Mike has experience in water resource planning including stormwater management, erosion and sediment control, and hydraulic and hydrologic analyses.

Jessica Klinefelter, CEP, CWB | Lead Environmental Planner

Jessica Klinefelter is a Certified Environmental Professional and Certified Wildlife Biologist with 20 years of experience helping local government agencies with their environmental planning and permitting needs. Her expertise includes National Environmental Protection Act (NEPA) studies and documentation; permitting; environmental assessments; floodplain studies; wetland delineations; total maximum daily load (TMDL) compliance; agency coordination; stream restoration; and endangered species surveys. She often works closely with planners and engineers to develop solutions for reducing risks and avoiding or minimizing environmental impacts while meeting owner objectives.

Jessica's environmental planning efforts will be supported by the following team members:

- Scot Aitkenhead, PWS | Scot brings experience in broad natural resources management and aquatic ecosystems management. He is also adept at watershed management, wetlands ecology, and forestry. Scot is a Professional Wetland Scientist and a Qualified Professional/Maryland Forest Conservation Act.
- Elsie Boone | Elsie is an environmental scientist with experience in wetlands, floodplains, forests, endangered species, and wildlife preservation.

Elizabeth Watson, FAICP | Historic and Cultural Resources Specialist

Elizabeth is a regional planner with Heritage Strategies. She has expertise in historic planning, land conservation, and rural community planning. She has worked on projects on the Eastern Shore, including Queen Anne's County, for 30 years. She performed early planning for the Stories of the Chesapeake Heritage Area, creating its management plan and advising nonprofit organizations in the four-county region on grants and strategic planning. Elizabeth understands the Eastern Shore's resources and Maryland's preservation and planning programs. Recognition of her work elevated her to Fellow in the College of the American Institute of Certified Planners in 2018. Elizabeth

works primarily out of Heritage Strategies' Chestertown, MD office. Elizabeth's historic and cultural resource planning efforts will be supported by Heritage Strategies staff, as well as other WM staff involved in the project.

Seth Darlington, PE | Lead Transportation Planner/Engineer

Seth has 13 years of transportation planning, engineering, and project management experience. He collaborates with multiple disciplines and stakeholders to solve routine and complex transportation challenges. He is on the leading edge of changing industry standards and guidelines and applies these standards and guidelines to client projects, when applicable. He has expertise in multimodal planning; context sensitive solutions; congestion management; urban design; and public outreach. Seth works primarily out of WM's Hunt Valley, MD office.

Seth's transportation planning efforts will be supported by the following team members:

- Jessica Shearer | Jessica is experienced in transportation planning and previously worked for the MDOT SHA Office of Planning and Preliminary Engineering, managing the state's capital program and regional planning activities as well as serving as the Program Manager for the Transportation Alternatives Program.
- Mike Steimer, PE | Mike has over 10 years of experience in the design and planning of transportation infrastructure and capital improvement projects. He has in-depth knowledge of MDOT standards, guidelines, and process and previously worked for MDOT SHA in project development.
- Jaime Vargas, PE, PTOE | Jaime has experience in traffic and transportation planning, and engineering services.

Maurice Carter | Lead GIS Analyst

Maurice is a GIS analyst with 16 years of experience. He has conducted geographic analyses; designed and maintained GIS database and system procedures; and performed cost/benefit/risk analyses. Maurice also has extensive experience in map creation. Maurice works primarily out of WM's Hunt Valley, MD office.

Maurice's GIS mapping and analysis and graphic efforts will be supported by the following team members:

- Kierran Sutherland | Kierran is a GIS professional with over 10 years of experience creating professional maps for use online, in presentations, and in reports; compiling and creating GIS data; and implementing geodatabases.
- Dawn Baldrige | Dawn has over 20 years' experience with GIS including hard copy and online map development, design and implementation of geodatabases, and network analysis and maintenance of geospatial data. She is also skilled in E911 data setup and the implementation and maintenance of all supporting spatial and tabular data to support these efforts.
- Kathryn Mays | Kathryn is WM's graphic designer. She understands the norms and trends of the industry to effectively produce persuasive work and applies these skills via a

planning perspective. When designing a piece, Kathryn uses technology effectively and creatively to produce clear communication in a timely manner.

- Shari Lance | Shari serves as WM's CADD Manager and is responsible for creating visually accurate renderings and graphics. Her renderings allow for greater project insight, superior project visualization, and productivity gains.

Ray Moravec, PE | Public Outreach and QA/QC

Ray is the Associate-in-Charge of WM's Transportation and Comprehensive Planning Department. He will assist with public outreach and QA/QC efforts on this project. Ray is a Maryland-registered Professional Engineer with 29 years of experience in transportation planning. Ray has led, or been involved with, all aspects of public outreach, with an emphasis on education and information sharing. His experience includes highway alignment and transit studies; bicycle and pedestrian facilities; access management; environmental technical analyses and documentation; traffic analysis; noise analysis; land use planning; plan development and implementation; and coordination with pertinent agencies and elected officials. Ray will be available whenever he is needed for this project. Ray works primarily out of WM's Hunt Valley, MD office.

Danielle Lloyd | Public Outreach Specialist

Danielle has eight years of experience in public outreach and advertising, working on numerous projects for state, federal, and private projects for Remline. She is an outstanding, detail-oriented project manager with effective communication skills that enable her to serve as a liaison between creative staff and clients. Danielle experience interacting with the public and state agency employees. Danielle works primarily out of Remline's Newark, DE office. Danielle's public outreach efforts will be supported by Remline staff, as well as other WM staff involved in the project.

Availability

WM's key and support staff are fully committed to this project. They have documented experience and familiarity with the requirements for the County's comprehensive plan update.

Our proposed staff has both the availability and the expertise to complete this project, on schedule and within budget. Our Project Manager, Lauren Good, will have 50% of her time available to dedicate to the completion of the Queen Anne's County Comprehensive Plan update project. The remainder of our key staff will have approximately 30% or more of their time available to commit, depending on project needs and schedule.

RESUMES

Detailed resumes of key staff members who will serve in significant leadership roles and successfully complete assignments begin on the following page. The WM Team will provide the full range of services to complete the Comprehensive Plan Update 2020.

Lauren Good, AICP
Project Manager and Lead Land Use Planner

Education

MS / 2007 / Urban and Regional Planning
BA / 2005 / Public and Urban Affairs
BA / 2005 / Political Science
Certificate / 2019 / Graphic Design

Registrations

American Institute of Certified Planners (AICP) / 2010

Years of Experience: 13

Lauren Good is a certified planner with 13 years of planning experience. She has a clear understanding of the County's objectives and plan update process, since she has updated eight comparable full comprehensive plans for municipal and county governments in Maryland and Delaware, as well as several small area and downtown revitalization plans. Lauren also has a proven record of accomplishment preparing land use and zoning ordinances, zoning maps, and presentations; implementing effective public participation programs; developing condition inventories and resulting needs analyses; completing resiliency and sustainability plans; and working collaboratively with public officials and advisory committees utilizing creative and interactive processes to address community planning needs. Lauren serves on the executive board of the Maryland Chapter of the American Planning Association and is a member of the national and Delaware chapters of the organization.

Small Area Long Range Master Plan Coordinator, Anne Arundel County, MD (2015): **Description:** Project involved long-range and comprehensive land use planning for various areas within the County. **Role:** **Project Manager** who oversaw the processing, review, and development of recommended departmental positions on zoning reclassifications, exceptions, variances, and zoning enforcement; drafted administrative decisions; and reviewed and analyzed applications for special permits and licenses for three of the County's small areas. **Challenges and Solutions:** The County adopted 16 small area plans to provide focused planning for its unincorporated areas. Lauren had primary responsibility for ensuring that development inquiries and plans conformed with three diverse communities: Broadneck, Severna Park, and Lake Shore.

Comprehensive Land Use Plan, Town of Georgetown, DE (2019): **Description:** Project involved developing a community-based vision and updating the Town's 2010 Comprehensive Plan. **Role:** **Task Manager** responsible for day-to-day project supervision; collecting and analyzing data; creating and laying out the plan; conducting GIS mapping and developing graphics; and conducting existing land use survey, outreach planning, and event coordination. Lauren also served as the plan's primary author. **Challenges and Solutions:** While analyzing existing and future land use maps, Lauren discovered numerous discrepancies. She

developed and managed a land use field assessment of the Town's parcels to confirm existing land use and developed a matrix for updating future land use and zoning classifications.

Comprehensive Plan, Town of Millville, DE (2019): **Description:** Project involved developing a community-based vision and updating the Town's 2009 Comprehensive Plan. **Role:** **Task Manager** responsible for providing day-to-day supervision; preparing project maps; creating, monitoring progress, and analyzing the community survey; researching and collecting data; creating and distributing public presentation materials; creating the plan layout; and creating the vision, goals and objectives reflective of community input. Lauren also served as the plan's primary author. **Challenges and Solutions:** During the update, Lauren discovered discrepancies in the official town limits and worked with Town and County officials and the Delaware Office of State Planning Coordination to update the official boundary.

Comprehensive Plan, Town of Blades, DE (2019): **Description:** The project involved the 2019 update to the Town's Comprehensive Plan. **Role:** **Task Manager** responsible for providing day-to-day project supervision; collecting and analyzing data; creating and laying out the plan; conducting GIS mapping and developing graphics; developing outreach events; and planning and coordinating the presentation. Lauren also served as the plan's primary author. **Challenges and Solutions:** Lauren facilitated two community outreach events in conjunction with the Town's National Night Out event.

Martinsville Southern Connector Project (US Route 220) Environmental Impact Statement (EIS), VDOT, Henry County, VA (2021): **Description:** Project involves evaluating alternatives for a seven-mile freeway connection from the North Carolina State Line to US Route 58 and developing an EIS. **Role:** **Senior Land Use Planner** responsible for drafting and reviewing various chapters of the EIS and its technical reports and providing public outreach services during public meetings and hearings. **Challenges and Solutions:** Several alternatives evaluated anticipate the relocation of residential housing. To allow for a better understanding of the project's purpose and need as well as reasons why relocations may be necessary, Lauren helped facilitate a public meeting for 300 people, many of whom may be affected by the potential relocations, that provided an overview of the study process, alternatives, and preferred alternative. The meeting also provided information about relocation services available as part of the project.

Comprehensive Plan, Town of Selbyville, DE (2019): **Description:** Project involved updating the Town's 2007 Comprehensive Plan. **Role:** **Task Manager** responsible for providing day-to-day project supervision; preparing project maps; creating and laying out the plan; researching and collecting data; creating and distributing public presentation materials; and creating the vision, goals, and objectives reflective of community input. Lauren also served as the plan's primary author. **Challenges and Solutions:** After a land use field inventory, Lauren analyzed more than 1,600 parcels to identify discrepancies

between existing land use, future land use found in the 2007 plan, and current zoning. She prepared exhibits for legal review and created maps that showed approved re-zonings, variances, and special exceptions that the Town could use.

Comprehensive Plan, City of New Castle, DE (2019): **Description:** Project involved updating the City's 2009 Plan. **Role:** **Task Manager** responsible for day-to-day project supervision; preparing project maps; researching and collecting all data; and co-authoring the plan. **Challenges and Solutions:** Lauren worked with students from the University of Delaware's (UD) School of Public Policy & Administration to broaden the neighborhood outreach component through the development of a Public Involvement Plan highlighting numerous options for outreach. She served as the daily point-of-contact for UD students, as well as the City's Planning Commission.

Comprehensive Development Plan, City of Rehoboth Beach, DE (2019): **Description:** Project involved preparing the City's 2020 Plan. **Role:** **Project Planner** responsible for updating the 2010 Plan; ensuring all data is current; and updating maps, figures, and tables. **Challenges and Solutions:** Lauren prepared all project maps; researched and collected data; created and distributed outreach and public presentation materials; and developed an extensive community survey in coordination with the City's Planning Commission. She also led in-depth discussions regarding census and American Community Survey data, as well as state data on population projections for the year-round and seasonal populations.

Comprehensive Plan, City of Seaford, DE (2019): **Description:** Project consisted of preparing the City's 2018 Plan. **Role:** **Task Manager** responsible for providing day-to-day project supervision; updating the 2010 plan; ensuring all data is current; and updating maps, figures, and tables. **Challenges and Solutions:** Lauren prepared project maps; researched and collected data; created and distributed outreach and public presentation materials; and developed community and business surveys in coordination with the City's staff, City Council, and Planning and Zoning Commission.

Downtown Development District Plan, Town of Middletown, DE (2019): **Description:** Project involved managing the creation of the Downtown Development District (DDD) Plan and funding administration compliance services for the Town. The Town received a successful grant award to complete a DDD Plan. **Role:** **Task Manager** responsible for day-to-day project supervision; providing grant research; creating the approach and eligible tasks; coordinating with supportive partners; and preparing the grant application with input from the Town. Lauren also served as the plan's primary author. **Challenges and Solutions:** Lauren drafted the initial grant application; prepared project maps; created and facilitated a downtown survey; researched and collected data including funding opportunities; created and distributed outreach and public presentation materials; organized and led task force meetings; facilitated downtown outreach events; performed field assessments; and served as the primary author of the State

Designation Application. The plan was adopted by the Town on March 18, 2019 and received state designation as a Downtown Development District by the Governor on August 19, 2019.

Odenton Town Center Master Plan, Anne Arundel County, MD (2015): **Description:** Project involved the five-year update to the Odenton Town Center Master Plan as required by the legislature. The community is characterized by its proximity to an active MARC station, a National Register-eligible historic district, and Fort Meade. **Role:** **Long Range Planner** responsible for drafting and reorganizing the plan; conducting GIS-related services; providing document layout; and facilitating public meetings. **Challenges and Solutions:** Odenton was designated as a Transit Oriented Development (TOD). All development projects located within the Town Center must comply with the provisions included in the master plan. The core of the Town Center is involved as a public-private partnership as the TOD tries to get off the ground with a stakeholder group comprised of state and County officials and a consortium of developers.

Community Sustainability Plan, Town of Fenwick Island, DE (2019): **Description:** Project entailed creating a Community Sustainability Plan and preparing and administering the grant application. **Role:** **Task Manager** responsible for day-to-day project supervision; collecting and analyzing data; creating and laying out the plan; conducting the environmental planning and analysis; providing GIS mapping and developing graphics; and planning outreach events. **Challenges and Solutions:** The Town was looking for a way to become more resilient in the face of future climate change and sea level rise scenarios. Lauren obtained the original Delaware Department of Natural Resources and Environmental Control grant monies to fund the project on behalf of the Town.

Plan of Conservation and Development, Town of Windsor, CT (2012): **Description:** Project updated multiple chapters of the Town's Comprehensive Plan including open space; agricultural resources; housing; economic development; villages; and the business/industrial corridor. **Role:** **Task Manager** responsible for day-to-day project supervision and amending drafts of the various chapters. **Challenges and Solutions:** Lauren identified and evaluated barriers to previous recommendations that had not been implemented and developed an action program including prioritizing goals and recommendations and implementing processes for each of the relevant sections.

Existing Land Use Map Update, Anne Arundel County, MD (2014): **Description:** Project updated the County's land use map. **Role:** **Project Manager** responsible for coordinating the countywide project and updating the map to be parcel-based by using recent aerial photography, Maryland Department of Assessment and Taxation records, and other local resources to determine each parcel's existing land use. **Challenges and Solutions:** Lauren developed a new, more useful methodology and a three-tiered, hierarchical land use list that can be used in various County computer modeling simulations.

Ray Moravec, PE
Public Outreach and QA/QC

Education

BS / 1990 / Civil Engineering

Registrations

Professional Engineer – Maryland #36053 / 2008

Years of Experience: 30

Ray Moravec is experienced in all aspects of transportation and land use planning including the National Environmental Policy Act (NEPA) process. His experience includes transportation planning studies to identify actionable goals and strategies in relationship to land use; economic development; sustainability; and community planning goals. He has managed the development of transportation components of sector and sub-area plans as well as feasibility, corridor planning, and Planning and Environmental Linkages studies; environmental technical analyses and documentation (including Environmental Impact Studies); traffic and noise analyses. Ray's expertise also includes developing public involvement plans; facilitating public meetings; and stakeholder / agency engagement.

Greenbelt Sector Plan, Maryland-National Capital Parks and Planning Commission, Prince George's County, MD (2013):

Description: This project involved a planning study that used future land use development and growth to assess changes to the sub-area plan and transportation network. The changes included a new major office development for the proposed FBI headquarters relocation and connections to the Greenbelt metro station. The land use and transportation update also identified and included changes to other land use and zoning for future year 2040. **Role:** **Transportation Planner** responsible for this multimodal access study involving traffic data collection; critical lane analyses; Synchro corridor modeling; future traffic forecasting; origin-destination study; development of recommendations; and participation in meetings with neighborhood organizations. Solutions focused on bicycle, pedestrian, transit, and vehicle mobility and access. **Challenges and Solutions:** Ray met with the community and elected officials to address the changing land use and transportation needs, with specific emphasis on bicycle, pedestrian, and transit operations.

Martinsville Southern Connector Study, Virginia Department of Transportation, Henry County, VA (2019):

Description: This project involved conducting an environmental impact study to evaluate alternatives for a seven-mile freeway connection from the North Carolina State Line to US Route 58. **Role:** **Transportation Planner/Project Manager** responsible for managing the study, which included providing a complex evaluation of five alternatives; developing and implementing public involvement plan; and performing agency coordination. Travel demand modeling involved developing a sub-area model and building off the statewide model. **Challenges and Solutions:** The corridor includes heavy interstate

truck traffic mixed with local traffic and numerous access points. Traffic data results focused on understanding the through vs. local and truck vs. auto traffic user mix to identify the need to address regional and local traffic.

MD 223 Corridor Planning Study, Maryland Department of Transportation State Highway Administration, Prince George's County, MD (2016): **Description:** Project involved developing transportation solutions to meet diverse land uses, ranging from rural residential to commercial centers, for this eight-mile corridor study. Study recommendations helped identify short- and long-term transportation solutions, such as system preservation to full NEPA analysis. **Role:** **Transportation Planner** responsible for managing the study. Developed the public involvement plan. Conducted stakeholder interviews and held two public workshops to discuss project needs and present alternative solutions, including neighborhood bicycle and pedestrian connectivity. **Challenges and Solutions:** Feasibility study completed to meet FHWA Planning and Environmental Linkages requirements.

Comprehensive Project Planning and Miscellaneous Consulting Services, Contract AE-3003, Maryland Transportation Authority (MDTA), Statewide, MD (Ongoing):

Description: On-call contract to provide comprehensive planning, environmental services, travel forecasting, and miscellaneous consulting services. **Role:** **Transportation Planner** responsible for managing several tasks. Assists MDTA in traffic impact study reviews and accessing permit applications for private development projects near MDTA facilities. Assists MDTA in consultation for project management activities for the Chesapeake Bay Crossing Study Tier 1 NEPA study. Activities also include assistance in the development of purpose and need; screening criteria; updates to the ferry and transit studies; and public involvement efforts. Ray is also providing project management support services for the review and coordination of the Belvidere Interchange study being undertaken by Stewart Properties. Assists with internal MDTA coordination and review, agency coordination, and public outreach. **Challenges and Solutions:** Working closely with MDTA to meet the MDTA facilities' transportation needs is a challenge, so we coordinate with all MDTA team members to include all disciplines in the process.

St. Leonard Second Access Road, Calvert County Department of Public Works, MD (2015):

Description: This project identified a second access road to a community that had only one way in and out; the community would be cut off with no ingress or egress if there was an accident or evacuation. **Role:** **Transportation Planner** responsible for the feasibility study that assessed transportation options to provide a second access point to meet community needs while still facilitating easy travel for bicyclists and pedestrians. **Challenges and Solutions:** Held interactive workshop sessions to present project needs and concepts. The community members were greatly divided on their opinions. His team collaborated with the community to develop consensus for the findings document and the presentation to the County Council.

Derek Morin, PE, PMP

Lead Utility Planner

Education

Master Certificate / 2009 / Engineering
BSCE / 1996 / Civil Engineering

Registrations

Professional Engineer – Maryland #27051 / 2002

Years of Experience: 22

Derek Morin has 22 years of public and private sector experience planning and designing water and sewer projects in Maryland and throughout the Mid-Atlantic region. His broad engineering experience includes water distribution; sanitary sewers; water treatment; wastewater treatment; hydraulics; site and utility design; and environmental permitting for these facilities.

High-Level Sewershed Project 1028, Baltimore City Department of Public Works (DPW), MD (2010): **Description:** Project included a comprehensive evaluation of the sewers in the 4,608-acre high-level sewershed. **Role: Deputy Project Manager** responsible for supervising the work of five engineering subconsultants and four sewer CCTV field contractors to complete this \$10 million program on-time and on-budget under Consent Decree dictated deadlines. His field CCTV teams produced video and condition reports for one million feet of sewers up to 100" in diameter. They inspected 6,000 public and private manholes and confirmed sewer connectivity to create accurate GIS mapping of defects on public and private property. Derek's survey teams mapped and hydraulically modelled 200,000LF of 8"- to 100"-diameter sanitary sewers using survey-grade GPS techniques. He managed the development and calibration of the Infoworks dynamic hydraulic model. The team used the information collected during each inspection to update/correct the City's GIS system. Derek managed alternative analyses, which involved simulating 70+ alternatives of relief, replacement, and pumping conveyance modifications. The selected alternatives became projects to improve the City's sanitary sewer collection system. They used a standardized cost estimating model to identify the recommended projects that could attain City-acceptable level-of-service. **Challenges and Solutions:** Before this sewershed project, the City's GIS system was created using as-builts and 200 scale utility maps. However, the City had low confidence in the accuracy of the sewers shown in the GIS. Field crews assessed the size of sewer assets, materials, and connectivity. His team revised the GIS mapping, which now has a more than 90% confidence level.

Rock Creek Trunk Sewer Capacity Improvements, City of Rockville DPW, MD, (2016): **Description:** Project involved designing a new 18"-diameter trunk sewer to divert sewage from a sewershed at capacity to a City sewershed with excess capacity. The sewer diversion allowed occupancy of a new development at the Rockville Town Center. The design was executed as part of a Public-Private Partnership. **Role: Principal-in-Charge**

responsible for executive oversight of developing and analyzing alternatives and designing 4,500 LF of 18"-diameter PVC sewer (SDR 26) and 33 precast-concrete manholes up to 30' deep. The selected alternative involved obtaining easements across private property that optimized the operation of the sewer and reduced construction costs. The alignment of the sewer traversed backyards, residential streets, state highways, metro and CSX, and Maryvale Park. **Challenges and Solutions:** The sewer project had to be complete before residences and commercial areas of the new Town Center could be occupied. The team responded quickly to foreseen site conditions found in the field to stay on schedule.

Southlawn Office / Industrial Center Water and Sewer Utilities Extension, City of Rockville DPW, MD (2004): **Description:** Project involved extending public water and sewer systems one mile to annex six properties with failing septic systems and wells into the City. **Role: Project Manager** responsible for developing plans for two sewer alternatives and one 12"-diameter water line. Managed public outreach to explain the alternatives and their impacts to property owners. **Challenges and Solutions:** Costs posed a challenge, since the six property owners resisted the capital costs of being added to the City water and sewer system regardless of their failing onsite systems. The City installed the water main anyway, hoping to entice the property owners to connect in the future.

Brushwood Sewer Extension, Anne Arundel County DPW MD (2008): **Description:** Project involved extending a gravity sewer 2,200 LF from Brushwood Court residences to a trunk sewer on West Benfield Drive, which convert septic onsite service for 20 residences to the public sanitary sewer system. **Role: Project Manager** responsible for designing the sewer extension and septic tank. **Challenges and Solutions:** The need for a 30'-deep trench in some spots elevated the costs. Installing E-One style grinder pump units at the five properties at the end of the Brushwood Road cul-de-sac reduced the trench depth to 20'. This saved \$250,000 in construction costs.

Sanitary Sewer Collection System Improvements in the Jones Falls Sewershed, Baltimore City DPW, MD (Ongoing): **Description:** Project involves rehabilitating sanitary sewer assets within the Glen Avenue sub-basin of the Jones Falls sewershed. The scope includes replacing or upsizing portions of the sewer network along Glen Avenue to increase sewer capacity. **Role: Assistant Project Manager and Utility Project Manager** responsible for preparing the preliminary design memorandum report, contract documents, and engineer's estimates. **Challenges and Solutions:** The Glen Avenue corridor contains parallel utilities (20"- and 6"-diameter water mains, parallel 8"-diameter sewer lines, gas, telecom), which makes replacing or upsizing sewer mains a challenge. Derek developed a strategy that connects existing parallel sewer lines to provide additional flow capacity in existing infrastructure, which reduces construction cost and duration.

Glenn Marschke, PE

Lead Water Resources Planner

Education

MS / 1994 / Environmental Engineering
BS / 1982 / Civil Engineering

Registrations

Professional Engineer – Maryland #16142 / 1988

Years of Experience: 36

Glenn Marschke has 36 years of planning and design level hydrologic and hydraulic (H&H) and stormwater management (SWM) analyses experience for water quality enhancement projects. He conducts these analyses in tandem with planning services; developing designs for SWM facilities/best management practices (BMPs), storm drains, and erosion and sediment control (ESC); floodplain analyses; stream restoration; fish passage; and wetland mitigation. He manages SWM facility inspection and environmental permitting. SWM services include initiatives to reduce nutrient loadings in waterways. He also serves as an approved Maryland Department of the Environment (MDE) technical reviewer for assessing SWM/ESC plans for their regulatory compliance.

On-Call Floodplain and Watershed Studies, Baltimore County Department of Public Works (DPW), MD (Ongoing):

Description: These two consecutive on-call contracts focus on floodplain and watershed-related services including watershed-wide studies of large Baltimore County waterways. **Role: Project Manager** responsible for staffing; technical, quality, schedule, and financial management; and agency coordination. Glenn managed watershed studies of Western Run, Jones Falls, Gwynns Falls, Roland Run, Maiden Choice Run, and the Back River. These analyses provided flow rates at roadway crossings to be used in the planning and design of developer projects. The analyses are also used to update FEMA mapping. The Western Run study included detailed H&H analyses — including SWM assessments to reduce flooding — that the County uses for planning long range flood mitigation projects. **Challenges and Solutions:** HEC-RAS generated a complex map of floodplains that he integrated into a statewide, GIS-based floodplain database that is linked to FEMA mapping. Glenn's team combined GIS contour mapping with a field survey of stream channels, bridges/culverts, and other features. H&H modelers, GIS technicians, FEMA representatives, and Baltimore County representatives coordinated consistently to complete this intricate integration process.

Total Maximum Daily Load (TMDL) SWM Site Searches and Concept Designs, MDOT SHA, Harford County, MD (2018):

Description: Project involved County-wide site searches to plan for new SWM BMP locations along roadways and MDOT SHA-owned facilities. The new facilities are intended to reduce nutrient loadings. **Role: Water Resources Project Manager** responsible for staffing; technical, quality, schedule, and financial

management; and agency coordination. Services included planning-level desktop evaluations (using GIS data) to identify new SWM BMP locations based on untreated impervious areas. After completing this work, his team conducted field investigations of the most feasible potential SWM BMP locations; they also developed SWM concepts, reports, cost estimates, funding request packages, and estimated design milestone schedules and advertisement dates. His team considered the necessity of avoiding utility conflicts, wetlands, and other environmental impacts when selecting the locations. **Challenges and Solutions:** Glenn carefully orchestrated the planning-level site searches to efficiently identify viable locations while minimizing wasted efforts on flawed sites. He assessed site constraints (such as impacts to environmental resources) and eliminated or deferred non-viable/non-preferred sites from future consideration.

Green Roads Program/Ager Road Improvements, Prince George's County DPW & Transportation (DPW&T), MD (2018):

Description: Project involved developing guidelines that establish practices, policies, and standard details in planning future roadway designs that include green infrastructure. As an initial/pilot project, practice from guidelines were used in designing green infrastructure for the Ager Road Complete Green Streets project.

Role: Water Resources Project Manager responsible for identifying best practices for maintainable and sustainable drainage as well as BMPs for SWM. He worked closely with County staff to ensure the guidelines met planning needs and addressed the goals of other DPW&T departments. **Challenges and Solutions:** Meeting the diverse and often competing needs of multiple stakeholders and departments within the County was a challenge. Glenn researched information from other agencies and participated in regular working sessions with County staff to develop consensus on the recommendations to be included in the guidelines. Glenn used the Green Roads guidelines for designing SWM — which incorporated micro-bioretenion, submerged gravel wetlands, and bio-swales — for Ager Road. The design removed more than two acres of impervious area and provided treatment for more than eight acres of legacy pavement above and beyond the project's requirements.

MD 5 Leonardtown Project Planning Study, St. Mary's County, MD (2011):

Description: Planning study involved developing and analyzing concepts to determine right-of-way and environmental impacts of potential improvements. **Role: Lead Water Resources Engineer** responsible for assessing SWM needs based on the environmental site design (ESD) criteria and the feasibility of the ESD micro-scale practices such as micro-bioretenion, bio-swales, and submerged gravel wetland. These SW/ESD practices are intended to reduce nutrient loadings. **Challenges and Solutions:** He proposed an underground BMP for an area with no available right-of-way.

Jessica Klinefelter, CEP, CWB

Lead Environmental Planner

Education

MS / 1998 / Wildlife Biology

BS / 1995 / Biology

Registrations

Certified Environmental Professional – ABCEP / 2011

Certified Wildlife Biologist – Wildlife Society / 2007

Years of Experience: 20

Jessica Klinefelter is a Certified Environmental Professional and Certified Wildlife Biologist with 20 years of experience helping local government agencies with environmental planning and permitting for capital improvement projects. Her expertise includes National Environmental Protection Act (NEPA) studies and documentation; permitting; environmental assessments; floodplain studies; wetland delineations; total maximum daily load (TMDL) compliance; agency coordination; stream restoration; and endangered species surveys. She works closely with engineers to develop solutions for reducing risks and avoiding or minimizing environmental impacts while meeting the owner's objectives.

Greenbelt Metro Area NEPA Re-Evaluation, MDOT SHA, Prince George's County, MD (2016): **Description:** Project entailed planning and design services for improvements on I-95/I-495 from east of US 1 to east of the Baltimore-Washington Parkway to accommodate improvements at the Greenbelt Metro Station as a mixed-use transit-oriented development. **Role:** **Environmental Manager** responsible for a NEPA re-evaluation due to time and project expansion since the Categorical Exclusion (CE) was first approved in 2005. She managed the analyses of air and noise quality; indirect and cumulative effects; natural resources; wetland impacts and mitigation; hazardous materials; community effects; environmental justice; and Section 4(f). **Challenges and Solutions:** Jessica's team used a streamlined Re-evaluation Consultation Fact Sheet to consolidate and convey changes that occurred since the CE approval. The team documented design changes, changes in environmental impacts, and recent public involvement activities.

Hall Creek Watershed Improvement Plan, Calvert County, MD (2011): **Description:** Project included a watershed assessment to identify pollution sources, requirements to achieve pollutant load reductions, and develop management measures that would achieve prescribed load reductions. **Role:** **Environmental Manager** responsible for collecting land use, stormwater management (SWM), water quality, and biological data; she also led field investigations of physical stream characteristics. **Challenges and Solutions:** The watershed was heavily grazed by horses, which contributed to water quality impairments. Jessica provided solutions for farm operations and programs to support farmers with stream and riparian buffer restoration.

Martinsville Southern Connector Environmental Impact Statement (EIS), VDOT, Henry County, VA (2021): **Description:** Project involves an environmental impact study to evaluate alternatives for a seven-mile freeway connection. **Role:** **Environmental Manager** responsible for analyzing the environmental impacts of five alternatives and developing the NEPA document. Environmental studies included socioeconomic; land use; indirect and cumulative effects; natural, archaeological, cultural, and historical resources; hazardous materials; and air and noise quality. She managed investigations of endangered species and wildlife habitats, streams and buffers, wetlands, and woodlands. **Challenges and Solutions:** This was one of the first projects to follow the One Federal Decision process that required expedited agency reviews; identifying a preferred alternative in the Draft EIS (DEIS); and acquiring permits 90 days after a Record of Decision. This necessitated frequent agency coordination and an aggressive schedule with concurrent activities.

Baltimore Red Line, MDOT MTA, Baltimore City, MD (2015): **Description:** Project involved the study of a 14-mile light rail transit providing east-west service through Baltimore City and County. **Role:** **Senior Environmental Specialist** supervising environmental NEPA documentation and environmental permits for the program management team. Jessica coordinated with the City's Forestry and Parks Department on street tree impacts and mitigation locations; oversaw wetland impacts/permitting requirements including stream restoration and wetland mitigation; coordinated with the Maryland Department of the Environment and USACE; participated in meetings with elected officials, schools, and community associations; and oversaw Critical Area impacts with the Critical Area Commission and stipulations of the programmatic agreement with the Maryland Historic Trust. **Challenges and Solutions:** The project necessitated weekly environmental coordination to track environmental commitments and ensure compliance with NEPA requirements.

Intercounty Connector Planning Study, MDOT SHA, Montgomery and Prince George's Counties, MD (2011): **Description:** Project required environmental planning for Maryland's first all-electronic toll road connecting I-270 at I-130 with US. **Role:** **Senior Environmental Manager and MDOT SHA's In-House Consultant Environmental Manager** responsible for overseeing consultants' studies of hazardous materials; natural and cultural resources; environmental stewardship; air/noise, economic, socioeconomic/community impacts; and Expert Land Use Panel. Participated in an interagency working group that addressed the concerns of local, state, and federal agencies. Participated in public meetings to present environmental resource information and seek feedback on alternatives and environmental concerns. Reviewed DEIS, final EIS, and technical support documents. **Challenges and Solutions:** This project was unique in that it convened an expert land use panel to evaluate the project's impact on surrounding land use and development. Jessica served on the panel and effectively guided the project towards successful NEPA approval and implementation.

Elizabeth Watson, FAICP

Historic and Cultural Resources Specialist

Education

MRP / 1981 / Regional Planning
MA / 1974 / History

Registrations

Fellow in the College of the American Institute of Certified Planners (APA) / Registration #095315 / 2001

Years of Experience: 41

HERITAGE strategies Elizabeth Watson is a regional planner with expertise in historic preservation, land conservation, and rural community planning. She is a co-author of *Saving America's Countryside* (Johns Hopkins, 1997) – the National Trust's award-winning guide that originated the field of rural historic preservation planning. She has worked on projects on the Eastern Shore, including Queen Anne's County, for 30 years. She performed early planning for the Stories of the Chesapeake Heritage Area; as its Executive Director, 2002-2009. She created its management plan and advised nonprofit organizations in the four-county region, including Queen Anne's County, on grants and strategic planning. As a long-time resident of Maryland's Eastern Shore (Chestertown), she understands its resources and Maryland's preservation and planning programs. Recognition of her work elevated her to Fellow in the College of the American Institute of Certified Planners in 2018.

White River Vision Plan, Indianapolis and Hamilton County, IN (2019): **Description:** A two-year plan to design a major greenway along 60+ miles of the White River. **Role:** **Historic and Cultural Resources Specialist** responsible for identifying resources and providing direction for design, interpretation, and programming. **Challenges and Solutions:** In a team of designers for placemaking and linkages, Elizabeth advocated for the river's historic character and stories, influencing the team's recognition of the cultural landscape and its structure for the project (in segments of widely varying character from urban to rural). Her understanding of environmental and urban planning enabled constructive dialogue with landscape architects and planners focused on the river's physical and recreational attributes.

Morris Canal Greenway Plan, North Jersey Transportation Planning Authority, NJ (2018): **Description:** An 18-month plan to develop a greenway and pathway along 101 miles of the 19th century route of the Morris Canal. **Role:** **Historic and Cultural Resources Specialist** identified resources and provided direction for design, interpretation, and programming. **Challenges and Solutions:** Fieldwork revealed that the canal is far more intact than originally understood, and that a unique cultural landscape of canal towns was easily recognizable. Elizabeth's advocacy for the corridor's history and character shaped the ultimate plan, including a recommended update to the 1971 National Register nomination and a rich program of interpretation.

Plans for Maryland's Working Waterfronts, for Talbot County, 2016 (Tilghman Island and Bellevue); Town of Oxford, 2017; Town of Rock Hall, 2017; and Town of Port Deposit, 2018: **Description:** Plans sponsored by Maryland's DNR focused on community waterfronts, associated resources, and greater public access to the water. **Role:** **Historic and Cultural Resources Specialist**, facilitator, and community planner. **Challenges and Solutions:** Each community had different concerns. Tilghman Island – she focused on economic development in relation to community planning and island-wide development limitations for the plan. Bellevue - she addressed the needs of a small park beside the ferry landing. Oxford – she examined high-tide effects on the historic district. Rock Hall – she helped design a waterfront walkway, encouraged use of rehab tax credits for two sites, and urged public protection of a parcel needed by watermen to load/unload. Port Deposit – she focused on creating linkages between a major park and the nearby historic district.

Historic Preservation Plan, Historic Resources Commission (HRC) of Asheville and Buncombe County, NC (2015): **Description:** After 30 years operating under guidelines enabling legislation for local commissions, the HRC needed to understand its options and priorities. **Role:** **Project Manager.** **Challenges and Solutions:** Public outreach was extensive to support planning for a very rural county and a city of more than 90,000. The downtown was not a local historic district; but, Elizabeth found ways to alter the design review process to include historic character. The plan assured the city there is more potential for tax-credit rehabs; recommended a "plan-on-a-page" neighborhood engagement process that was successfully employed for the city's comprehensive plan update; and prioritized numerous projects.

National Heritage Area Management Plans for Crossroads of the American Revolution, NJ (2011); Sangre de Cristo, CO (2012); Niagara Falls, NY (2012); Abraham Lincoln, IL (2012); Delaware and Lehigh, PA (2013); Freedom's Way, MA and NH (2015): **Description:** These plans addressed historic preservation, "Main Street" needs, interpretation, wayfinding, land conservation, recreation, the arts, and heritage tourism. **Role:** **Project Manager.** **Challenges and Solutions:** She managed an intensive inventory and evaluation of historic sites and innovative programs for public outreach and interpretation of the significance of historic sites, districts, and cultural landscapes.

Cultural Assets Inventories, The ARTS Council of the Southern Finger Lakes, NY (2016) and Finger Lakes Wine Country (2019): **Description:** Created a database and GIS maps including heritage tourism and local foods businesses, artists, and recreational and historic sites. **Role:** **Project Director.** **Challenges and Solutions:** She conducted an innovative assessment of businesses and nonprofits to promote deeper relationships. For Finger Lakes Wine Country, she provided insights into the visitor experience beyond the region's many wineries, enabling deeper promotion of the heritage tourism experience.

Maurice Carter

Lead GIS Analyst

Education

BS / 2003 / Geography

Years of Experience: 16

Maurice Carter is a Geographic Information System (GIS) analyst with 16 years of experience. He has evaluated products and service alternatives for GIS services; conducted geographic analyses; designed and maintained Oracle Spatial GIS database system procedures; and developed and managed a Crime/Incident Tracking GIS (using Esri ArcGIS Server); and performed cost/benefit/risk analyses. He has prepared and reviewed application and infrastructure specifications and development plans and ensured their cost-effectiveness, compatibility with architectures, and compliance with security/control and technology recovery practices.

Project Tracking Database - Project Management Support, MDOT SHA, MD (Ongoing): **Description:** This project involves supporting the data management needs of MDOT SHA, focusing on their water quality restoration planning efforts. Services included development of a Project Tracking database for the MDOT-SHA Plan Review Division (PRD). This database captures all information related to the review of development plans for compliance with stormwater management, erosion and sediment control, and similar regulatory elements. **Role:** **GIS Analyst** responsible for facilitating stakeholder workgroups tasked with identifying all workflows and data elements related to plan review efforts. This task required Maurice to fully integrate himself within PRD's plan review efforts so that he could shape the database to reflect their operational and administrative needs. Maurice used this knowledge to create the database and incorporated several functions that significantly improved the efficiency of PRD staff and reduced the turnaround time for plan review. He created reporting functions that allow PRD to generate their various annual reporting needs on-demand to support the delegated authority requirements to demonstrate compliance with state regulations. This effort required Maurice to fully understand the planning process, the regulations being enforced, and to synthesize this information into a database structure. **Challenges and Solutions:** MDOT SHA previously used various spreadsheets that were inconsistent from one reviewer to the next. To enable the database functions to properly report on activity and track project status, Maurice needed to work with all the planners to gain buy-in to the centralized database system. He was able to demonstrate to the planners that he had listened to their needs and integrated database components in response to these needs. This approach allowed Maurice to successfully deploy the database and attain complete user acceptance and integration.

Americans with Disabilities Act (ADA) Analysis, Asset Inventory Development, and Management Program Implementation, City of Baltimore Department of Transportation (DOT), MD (Ongoing): **Description:** This project involves collecting mobile LiDAR data and high-resolution street-level imagery and subsequent asset extraction and analyzing ADA assets for regulatory compliance. **Role:** **GIS Analyst** responsible for developing the analytical approach to review the asset datasets for compliance with ADA criteria. Maurice reviewed federal and state ADA standards and regulations and translated this understanding to a GIS-based analytical model. He also facilitated stakeholder workshops that identified the various asset classes and attributes required for DOT to transition their management programs to a performance management approach. **Challenges and Solutions:** Much of Baltimore's pedestrian infrastructure was installed several decades ago, prior to ADA design standard implementation. The lack of consistency in construction standards of pedestrian infrastructure precluded using automated analysis tools. Therefore, Maurice relied on his understanding of the evolution of ADA regulations and current standards to develop an approach to the compliance analysis that provided flexibility to the analytical methods while ensuring comprehensive review of all infrastructure and while keeping costs under control. The resulting process included three phases, each progressively more detailed. Phase I featured desktop analysis of pedestrian ramps to identify clearly non-compliant assets. Those assets that met these initial criteria passed to Phase II, boots-on-the-ground analysis. For those assets that met Phase II requirements, Maurice then performed the Phase III review to determine if pedestrian networks connecting compliant ramps were ADA compliant. This approach permitted the review of over 50,000 ramps and sidewalk features for less than half the cost of similar analysis approaches.

Martinsville Southern Connector Study, Virginia Department of Transportation, Henry County, VA (2019): **Description:** This study focused on the identification of the purpose and need for the study and the development of alternative solutions. Services included a full socioeconomic and natural environmental resource inventory and impact analysis. **Role:** **GIS Analyst** assisting with the development of numerous GIS analyses, figures, and stakeholder identification and outreach efforts. Maurice assisted with identifying potentially impacted property owners and mailing list development for multiple alignment options. He helped to identify, acquire, and analyze existing GIS base data and helped to generate new content necessary for project design elements. **Challenges and Solutions:** Maurice identified deficiencies with the underlying parcel data used to develop mailing lists. He then assisted with the creation of custom scripts to scrape various Virginia websites for updated ownership records and appended the new information to the existing datasets.

Seth Darlington, PE
Lead Transportation Engineer/Planner

Education

BS / 2006 / Civil Engineering

Registrations

Professional Engineer – Maryland #39917 / 2010

Years of Experience: 13

Seth Darlington has 13 years of transportation engineering, planning, and project management experience. He has served as on numerous transportation, transit, and planning projects for state and local agencies in Maryland. Seth collaborates with multiple disciplines and stakeholders to solve routine and complex planning and transportation challenges. He has in-depth knowledge of state, federal, and National Association of City Transportation Officials (NACTO) standards and guidelines. He has expertise in multimodal planning; context sensitive solutions; congestion and access management; urban design; transit planning; feasibility studies; and public outreach.

Southern Maryland Regional Transit Study, MDOT MTA, Prince George's and Charles Counties, MD (2017):

Description: This three-year pre-NEPA planning study focused on evaluating the advancement of Bus Rapid Transit (BRT) or Light Rail Transit (LRT) along a 20-mile corridor between the Branch Avenue metro station in Prince George's County and the Waldorf-White Plains area in Charles County. The study found that BRT offers comparable ridership and time benefits for \$500M less than LRT. County planners provided the information to incorporate into future land use and transportation master plans. **Role:** **Transportation Planner** responsible for evaluating preliminary BRT and LRT alternative alignments and station locations; risk assessments; cost estimates; design elements to comply with Federal Highway Administration (FHWA), Federal Railroad Administration, and CSX design requirements; conceptual design of an LRT maintenance facility; and a planning analysis and cost estimate of tunnel options for I-495. **Challenges and Solutions:** Alternatives involved both a land use and transportation relationship for access and existing development and redevelopment opportunities. Identified locations in mostly undeveloped areas, but with easy access for potential transit riders and access to mix-used development.

MD 223 Planning and Environmental Linkages (PEL) Study, MDOT SHA, Prince George's County, MD (2016):

Description: The MD 223 corridor planning study focused on developing transportation solutions for diverse land uses across this eight-mile corridor. **Role:** **Transportation Planner** responsible for designing multiple short-, mid-, and long-term transportation solutions for the corridor. These solutions ranged from system preservation projects to full National Environmental Protection Act (NEPA) analysis. This study was conducted in coordination with FHWA as part of the NEPA PEL process. **Challenges and Solutions:** The

limited right-of-way and available funding drove the need for context-sensitive solutions.

MD 32 PEL Study, MDOT SHA, Howard/Carroll Counties, MD (2018): **Description:** This PEL study developed measures of effectiveness to address the short- and mid-term needs of the corridor. The study also identified long-term solutions to address the future needs. **Role:** **Transportation Planner** responsible for concept development, cost estimates, ROW needs, and QA/QC. **Challenges and Solutions:** Identified short- and mid-term improvements for implementation prior to larger capital projects.

MD 5 Great Mills Transportation Improvement Study, MDOT SHA, St. Mary's County, MD (2016): **Description:** The project location is considered a choke point; it is constrained by commercial and residential development and a bridge over the St. Mary's River. This project developed transportation alternatives and capacity improvements to alleviate the choke point. **Role:** **Transportation Planner** responsible for developing alternatives, including avoidance and minimization operations. He assisted in the environmental assessment and worked to establish intersection improvements and corridor capacity improvements (including bicycle and pedestrian facilities). **Challenges and Solutions:** His team balanced impacts to business and residences while still meeting floodplain requirements.

Greenbelt Sector Plan, Maryland-National Capital Park and Planning Commission, Prince George's County, MD (2013):

Description: This project developed the transportation elements associated with the Greenbelt sector plan. **Role:** **Transportation Planner** responsible for developing existing and future transportation operational and safety improvements for the Greenbelt sector plan. Transportation alternatives included improvements to MD 193, as well as enhancing pedestrian and bicycle access to the Greenbelt metro station. The work included public presentations of existing and proposed conditions, including graphics and renderings. **Challenges and Solutions:** The team was tasked with balancing vehicular traffic with bicycle, pedestrian, and transit needs. The team also considered both existing and future development and redevelopment opportunities.

Riverside Traffic Circle Feasibility Study, City of Salisbury, MD (2018):

Description: This project involved a traffic study and analysis to assess the feasibility of a roundabout to improve current and future traffic operations and bicycle and pedestrian safety and a complex intersection of four roads. **Role:** **Transportation Engineer/Planner** tasked with alternative design development, traffic analysis, and impact and cost evaluation. Presented the project to the public at an open City Council session to garner public input and support. **Challenges and Solutions:** Replacing a traditional signaled intersection with a roundabout can change the traffic patterns for downstream intersections by eliminating the traffic metering added by signal timing. The team evaluated potential downstream improvements to improve overall level-of-service through a system of intersections surrounding the proposed roundabout.

Danielle Lloyd
Public Outreach Specialist

Education

B.S. / 2011 / Business Administration

Years of Experience: 8

Danielle Lloyd has eight years of experience in marketing, advertising, and public outreach and has played an integral role in state, federal, and private projects for Remline. She is an outstanding, detail-oriented project manager with strong communication skills that enable her to serve as a liaison between the creative staff and clients, including the Maryland Department of Transportation Maryland Transit Administration (MDOT MTA) and Maryland State Highway Administration (MDOT SHA); Delaware Department of Transportation (DeIDOT); and the State of Delaware, Office of the Governor. Danielle has years of experience interacting with the public and state agency employees.

MD 32 Corridor Planning and Environmental Linkages (PEL) Study, MDOT SHA, Carroll and Howard Counties (2018):

Description: MDOT SHA used this PEL study to identify current and future transportation needs for the MD 32 corridor. Needs were identified through in-person and online surveys and a public meeting and were then published in a 52-page report and a full set of appendices. Findings from the online survey were analyzed and summarized into eye-catching, easy to understand graphics. The report included a full summary of needs, charts and tables, in addition to graphics of future visions for the corridor. **Role: Public Outreach Specialist** (subconsultant to WM) responsible for identifying and creating survey questions for stakeholders; producing outreach materials like meeting boards, a newsletter, and the full report and appendices; and providing support at the public meeting including interacting with participants and assisting MDOT SHA staff. **Challenges and Solutions:** Using her years of experience in public outreach, Danielle was instrumental in helping to develop survey questions, and then breaking down the responses to provide a snapshot of public thoughts and opinions on the Study. These findings were integral throughout the course of the planning study and were featured at the public meeting on display boards.

2040 Regional Transportation Plan, the Wilmington Area Planning Council (WILMAPCO), DE (2015):

Description: The plan was adopted by WILMAPCO to set a broad vision for transportation in the New Castle County, DE and Cecil County, MD and identify actions needed to achieve and measure its goals. The findings were summarized in a 52-page report. **Role: Project Manager** responsible for design and copywriting for the report, including simplifying client-provided text geared toward the general public. She directed design of the logo, report cover, and inside page layout. **Challenges and Solutions:** During the design of the plan, the client requested that we make some changes to the

template. We were able to incorporate these fairly broad revisions, and still complete the plan in a timely fashion.

Maryland Twenty-Year Bicycle and Pedestrian Master Plan, Maryland Department of Transportation (MDOT) (2014):

Description: The Maryland Transportation Plan established a 20-year vision for making walking and bicycling an integral part of Maryland's transportation system, including the context in which this vision will be pursued. **Role: Project Manager** was responsible for the textual and graphical display and summary of the plan, as well as goal handouts. Danielle led the design phase; writing and simplifying copy; supervising cover and layout design; and providing ideas and direction for charts, tables and graphs within the plan. Upon its completion, the Bicycle and Pedestrian Master Plan was 52 pages. **Challenges and Solutions:** MDOT was very satisfied with our fresh take on the design of the Bike/Ped Plan.

MDOT Annual Attainment Report, MDOT (Yearly):

Description: This report is an in-depth evaluation of the state's transportation system performance, including metrics and benchmarks previously determined by the state. Remline is responsible for all design aspects of the report, including design of the cover, inside pages, and dozens of charts showcasing how the state has or has not met specific benchmarks. **Role: Project Manager** responsible for designing and copyediting the 2019 Attainment Report. Danielle ensured that the client's needs and visions for the report were met, resulting in a comprehensive 64-page report. **Challenges and Solutions:** This annual report has a set page count and strict branding guidelines related to language, design, layout, and use of images. Danielle's diligent reviews of each portion of the report and working closely with the client resulted in a well-received final report.

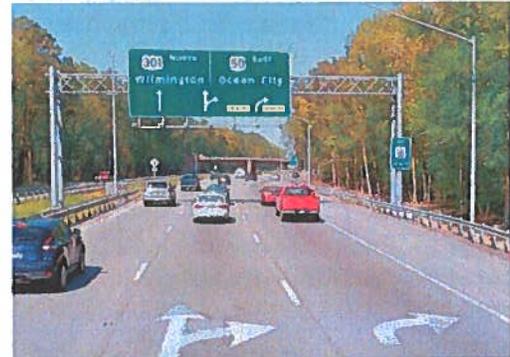
Long Range Transportation Plan, DeIDOT, DE (2017):

Description: Remline assisted DeIDOT with promoting their Long Range Transportation Plan by designing a website template that is dynamic and user-friendly. To illustrate the current vs future look of transportation over the next 20 years, Remline created a web graphic that generates future improvements overlaid on a transportation scene; when the user moves the cursor over them, the improvements are highlighted. The site also includes visions, goals, topics, the full draft long range transportation plan, and a schedule of outreach and implementation. **Role: Project Manager** was responsible for guiding the web designer in creating the layout of the website in addition to writing and editing copy for the site. **Challenges and Solutions:** Danielle worked with a graphic designer to determine the best way to show the current transportation technology compared to the future in an interactive, but easy to comprehend, way.



Section 3

Related Experience



Wallace Montgomery (WM) is a multidisciplinary consulting firm, headquartered in Hunt Valley, Maryland. We have served public agencies throughout the Mid-Atlantic since 1975. The quality of work we have delivered and the relationships we have built empowers us to cultivate a talented and growing staff in our Dover and Newark, Delaware offices. Our history of close collaboration and exemplary service is evident in all we can offer Queen Anne's County – most specifically, our staff of 240 professionals including planners, engineers, and scientists. Our core mission and values of quality, teamwork, and client service have driven every action we have taken since we opened our doors 44 years ago; they continue to inspire us as we grow.

PROFESSIONAL COMPETENCE AND PROVEN RECORD OF ACCOMPLISHMENT

WM's core project team, which will lead project efforts from our office in Dover, is a leader in the industry. We have built this reputation by providing a comprehensive range of services to jurisdictions throughout the states of Maryland, Delaware, Pennsylvania, and Virginia. We are pleased to have Lauren Good, AICP, serve as our Project Manager on the 2020 Comprehensive Plan Update project. Lauren recently joined our Dover office and strengthens WM's comprehensive planning capabilities. She is supported by team members with plan development expertise and a range of experience in various fields.

Comprehensive Plans

We have worked with numerous jurisdictions to update, rewrite, or develop comprehensive plans at all levels of government in Maryland, Delaware, Pennsylvania, and Connecticut. This expertise includes public outreach and goes beyond standard state requirements. We have used these comprehensive plans to provide factual data when developing a community's vision for the future. We also use these plans when examining the following vital issues: proper use of land; economic development; housing; transportation and other infrastructure; environment; and cultural and historic resource protection.

We have used these plans to help communities be proactive, innovative, and collaborative to grow and embrace change in the following areas:

- Guiding reinvestment in existing communities
- Encouraging the development of neighborhoods that are attractive and livable for people of all ages, ability levels, and style preference
- Facilitating business opportunities in locations that complement existing communities and stimulate the economy

- Preserving natural, historical, recreational, and agricultural resources
- Facilitating the process of preparing for new technology, changing demographics, and climate change

Downtown, Neighborhood & Community Revitalization Plans

We have been fortunate to work with many jurisdictions in Maryland and Delaware. Our work on downtown, neighborhood, and community revitalization plans has helped inspire community participation in the plan development process, specifically for economic development.

In Delaware, we have worked with numerous designated Downtown Development Districts (DDD) to develop initial DDD Plans, apply for State designation, and provide services to implement revitalization and economic development strategies. Work with current DDD jurisdictions included the Town of Georgetown; City of Harrington; Town of Laurel; Town of Middletown; and Town of Smyrna.

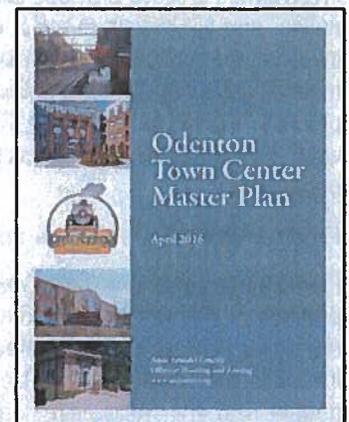
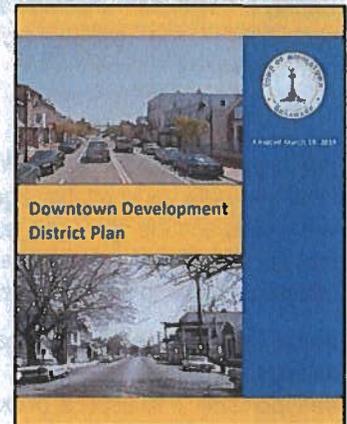
Outside of Delaware, we have worked on revitalization planning for the following jurisdictions:

Anne Arundel County, Maryland – Services included updating the transit-oriented development Odenton Town Center Master Plan.

Chesapeake City, Maryland – Services involved helping the City apply for and receive grant funding to begin a residential façade improvement program.

Town of Rising Sun, Maryland – Work involved collaborating with the Town Administrator to determine economic development priority areas and develop concept-level mapping of road and trail improvements to facilitate these efforts.

Town of Windsor, Connecticut – Services involved amending chapters of the Conservation and Development Plan, including "Guide Housing & Residential Development"; "Support Business &



Economic Development”; “Enhance Villages”; and “Day Hill Corporate Area”; which is the Town’s business and industrial corridor.

Sustainability Plans

Our work — including successful projects such as the Fenwick Island Community Sustainability Plan, Charlestown Vulnerability Assessment, and participation with the Resilient and Sustainable Communities League — empowers us to expand our skill sets related to sustainability and resiliency. WM recognizes the County’s needs and understands how to apply the concepts of sustainability and resiliency to better integrate these in our planning efforts.

Transportation Plans

WM is proud of our success in developing transportation plans for local and state transportation agencies in the Mid-Atlantic region. We understand the pressures governments face to do more with less and the need to solve problems in the most efficient and cost-effective manner to achieve short- and long-term goals.

Since Queen Anne’s County has a mix of rural and suburban settings, it becomes even more important to consider transportation in all aspects of the planning process.

Due to our current and previous work with MDOT, we can provide extra value to our Maryland clients by incorporating current trends and best practices.

PUBLIC FACILITATION CAPABILITIES AND EXPERIENCE

WM has a reputation for managing first-class, customized public participation and outreach programs. Public involvement is a key component of the planning process. Our proactive public involvement process provides complete information, timely public notice, and full access to major decision-making: We believe in involving the public early in the plan development process and then maintaining a high level of public involvement through the entire process. We integrate meaningful public involvement into technical work by facilitating best practices and traditional strategies to engage the public.

Public Outreach, Strategies, and Products

Public participation is a vitally important component of the planning process. WM gets input from stakeholders and the public regarding plan goals and strategies, individual needs, and best investment strategies. We also use strategies to reach out to people who are traditionally underserved in planning processes such as low-income and minority households.

We have used the following public outreach strategies to get the most effective and actionable information:

- Meeting facilitation
- Public information materials
- Open houses / stakeholder forums
- Workshops

- Community events
- Public opinion surveys
- Community advisory boards
- Public service announcements
- Tailored outreach to underserved populations
- Websites
- Brainstorming and visioning workshops
- Briefings
- Key stakeholder / informant interviews
- Focus groups
- Youth outreach strategies
- Media relations and press coverage
- Promotional campaigns
- Social media
- Public meetings
- Public hearings



Effective engagement takes careful planning: Each population we work with presents a unique opportunity to . . .

- Broaden our ability to build personal relationships with the target population
- Create a welcoming atmosphere
- Increase accessibility
- Develop alternative methods for engagement
- Maintain a presence within the community
- Partner with diverse organizations and agencies

Workshop and Community Involvement Facilitation

Each WM planning project includes a community involvement component. We work side-by-side with our clients to develop strategic and personalized workshops and facilitate events that inform the public, solicit opinions, and build consensus. Our experience ranges from facilitating small focus groups to meetings and workshops with hundreds of participants.

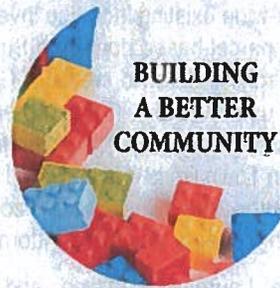
Graphic Design and Publications

Effective outreach requires developing straightforward and accessible communication. Several of our WM Team members with talent in public outreach will work as an integral addition to Queen Anne’s County staff to enhance and clarify project messages. We can help clients by creating anything from minor visual aids to impactful, smooth presentations.

We will provide County-wide outreach by engaging people from a variety of backgrounds, educational levels, and even languages. We can provide Spanish and American Sign Language interpreter services as an add-on service. We will use simple, non-technical terms and graphics to explain complex concepts.

Images are a universal language that facilitate broader communication. When we work with communities, we create diagrams, illustrations, graphs, and figures to help the reader understand our core ideas. We carefully choose the colors – having too many can be distracting, making it difficult for readers to focus attention on content. Our Team includes people with experience in graphics and publication software, including Adobe Photoshop, Illustrator, and InDesign. They also have experience with more widely-used programs such as Microsoft Word, Excel, PowerPoint, and Publisher. We can use a variety of these programs to develop the following materials:

- Public engagement plans
- Educational outreach
- Meetings and events
- Visualizations
- Project branding
- Print collateral
- Social media outreach
- Surveys
- Creative writing and editing
- Presentations
- Stakeholder database
- Website content



HIGH-QUALITY DOCUMENTS AND GRAPHICS

WM will make the Comprehensive Plan the best it can be. Our process will ensure the document is clean, clear, and consistent in terms of spelling, grammar, style, and punctuation. We will ensure that it is audience-appropriate and conveys the intended meaning.

We will make sure the text is reader-friendly for diverse audiences. We will use shorter words and phrases to avoid exhausting the reader with superfluous information. We will focus on the material that is worthy of conveying the Plan's value and purpose to the broadest possible audience. Before we begin drafting the plan document, we will develop a table of contents and outline that will allow for the smooth transition from one point to the next and provide a good starting point for ensuing work. We will also maintain a consistent style and voice throughout the document.

The WM Team provides professionals with proven understanding of comprehensive planning; technical writers; graphic designers; and quality control specialists who will ensure the document is technically correct and the best product for the County.

The WM Team includes public outreach and marketing specialists who will develop a cover and spread template for the County plan and three community plans. These will be used to ensure professional quality layout to complement the professional planning work being completed throughout the project. Some examples of our Team's documents and graphics can be found in Section 7, "Additional Information" of this proposal.

RELATED EXPERIENCE

The WM Team members have demonstrated experience creating comprehensive plans and performing similar long-range planning activities. The table below includes the services we have performed. In-depth descriptions of representative experience begin on page 3-4.

	Plan Services	Code Update	Public Outreach	GIS Services
Maryland Jurisdictions				
Anne Arundel County	✓	✓	✓	✓
City of Baltimore	✓	✓	✓	✓
City of Rockville			✓	✓
Town of Charlestown		✓	✓	✓
Town of Delmar	✓			
Anne Arundel County			✓	✓
Calvert County	✓		✓	✓
Montgomery County	✓		✓	✓
M-NCPPC Prince George's County	✓		✓	✓
MWCOG	✓		✓	✓
Prince George's County	✓		✓	✓
Talbot County	✓		✓	✓
Town of Port Deposit	✓	✓	✓	✓
Town of Ridgely		✓	✓	✓
Town of Rising Sun	✓		✓	✓
Delaware Jurisdictions				
Town of Blades	✓		✓	✓
Delaware Department of Transportation	✓		✓	✓
Town of Felton	✓			✓
Town of Fenwick Island	✓	✓	✓	✓
Town of Georgetown	✓	✓	✓	✓
City of Harrington	✓	✓	✓	✓
Town of Middletown	✓		✓	✓
Town of Millville	✓		✓	✓
City of New Castle	✓		✓	✓
City of Rehoboth Beach	✓		✓	✓
City of Seaford	✓		✓	✓
Town of Selbyville	✓		✓	✓
Town of Smyrna	✓		✓	✓
Other Jurisdictions				
City of Harrisburg, PA	✓			✓
Virginia Department of Transportation	✓		✓	✓
Town of Windsor, CT	✓	✓	✓	✓

Please note that some of the projects and jurisdictions included in the table (above/location) reflect our Project Manager's experience while at other firms.

**Comprehensive Plan Update
Georgetown, Delaware**

Relevance to the Comprehensive Plan Update 2020

- Comprehensive Plan
- Public Outreach
- Land Use Analysis
- Mapping & Graphics Development
- Policies & Regulations Evaluation
- Public Outreach

Project Description

Georgetown's last comprehensive plan was certified in 2010. Per Delaware Code, the Town is required to update their plan at least every 10 years. Lauren Good, AICP (Wallace Montgomery's Project Manager for Queen Anne's County Comprehensive Plan Update 2020) managed planning and public outreach services to begin developing the 2020 Comprehensive Plan, along with associated maps and implementation recommendations.



Project Scope of Services

Lauren's team provided planning services including data collection and analysis; plan development; public outreach; GIS mapping; and land use inventory and analysis.

Comprehensive Plan: The Plan focused on several key elements, including town and community services; transportation; utilities; land use; economic development; housing; environmental protection; open space and recreation; and historic and cultural resources.

Development of the Plan update involved the following key services:

- Identifying resources and collecting data to create GIS maps
- Performing community outreach through events, an online community survey, and SWOT analysis
- Conducting existing and future land use and zoning analyses
- Preparing multiple joint Planning Commission and Town Council presentations
- Drafting the Plan and presenting the draft plan to the public
- Coordinating with the state's Preliminary Land Use Service

Public Outreach: Lauren created a project website that includes the presentations; a link to the community survey; and the future draft plan for public review and comment. She developed an online community survey and provided translated versions for the Spanish-speaking population. These surveys resulted in more than 150 respondents providing answers to questions and providing nearly 650 write-in comments on their thoughts about the

Town's future. The responses provided insight into how the public felt about the current use of land and its future development and the type, location, and amount of housing available. They also identified where additional resources are needed.

The Plan's development was strongly tied to the results of the community survey. The plan included information gleaned from the survey; the data was also included, in its entirety, as an appendix.

Land Use Analysis: A land use inventory was completed by others during prior comprehensive plan efforts. To better analyze existing land uses and provide informed recommendations for both future land use and zoning considerations, Lauren conducted a town-wide existing land use inventory. She obtained updated GIS map parcel-based data from Sussex County, as well as Town tax and zoning data, to create a GIS mapping layer for the existing land use inventory. Lauren created a data spreadsheet by using this information as a tool in the field to analyze each parcel of land within Town limits and assigned an existing land use classification. She proposed a land use and zoning classification flow chart to the Town Manager and Town Attorney to review.

Once Lauren completed and verified the existing land use inventory, she imported the zoning and future land use data to analyze each parcel and ensure the compatibility of the land use and zoning classifications. The project is now in the stage of determining if the parcels are conforming, nonconforming, zoned incorrectly, or if further research is needed for a legal determination.

The Plan is currently in a draft stage, awaiting future input from the Planning Commission to finalize goals and objectives before it is presented for public review and comment as part of the adoption process. The Plan update will be completed by others.

Challenges and Solutions

Challenge: It was difficult to schedule community meetings where large numbers of stakeholders could attend. **Solution:** The team posted presentations to the project website and sent out electronically with forms to receive feedback from residents who could not attend meetings, increasing the amount of feedback we received.

Satisfying the Client's Objectives

Lauren is committed to collaboration, innovation, and flexibility when delivering projects, in addition to open and frequent communication, which aided the client when prioritizing needs.

Client Contact
 Jocelyn Godwin | Planning Project Administrator
 302.856.7391 | jgodwin@georgetowndel.com

Fee: Original – \$49K; Actual – \$54K
Additional outreach services provided at Client request.

Duration of Lauren's Services: 18 months

**Downtown Development District Plan
Middletown, Delaware**

Relevance to the Comprehensive Plan Update 2020



- Small Area Plan
- Public Outreach
- Community Visioning
- Economic Development
- Condition Inventory & Needs Analysis
- Public Outreach

Project Description

The Town had experienced some development success, which included pressure from its western end. The Town wanted to focus a revitalization effort on its downtown; however, there had been no concentrated planning effort on this area. Lauren Good, AICP (Wallace Montgomery's Project Manager for Queen Anne's County Comprehensive Plan Update 2020) completed a successful grant application to develop a Downtown Development District (DDD) Plan, as well as a designation application to assist in focusing future redevelopment efforts.

Project Scope of Services

Lauren's team provided planning, public outreach, agency coordination, and grant application and administration services.

Grant Administration: Lauren prepared an application to obtain a \$49,995 Neighborhood Building Blocks Fund (NBBF) grant to create a DDD Plan. Part of the grant application process required a presentation to the review board. The board was comprised of representatives from the Division of Small Business; the Department of Justice; the State Housing Authority; the Office of State Planning Coordination; and a public representative.

Plan Development: Creating the Town's DDD Plan entailed forming a task force; facilitating multiple public outreach events; developing and analyzing an online survey; creating maps; and performing data and existing condition analyses. Once the team developed the vision and goals, they devised implementation strategies for economic and retail development; housing; public realm; parking; and transportation. They also identified several potential funding sources for implementation.

Public Outreach: Lauren identified and coordinated with project partners and members of the task force, such as Middletown Main Street, Inc.; Clark Construction; Middletown Historical Society; The Everett Theatre; Wellbeing on Main; and Volunteer Brewing Company. She facilitated several task force meetings and created an online survey, as well as an outreach booth for the Town's annual Peach Festival, to showcase the project and garner citizen input about the downtown area.

The planning process also engaged Town staff; elected officials; residents; property owners; business owners; and local organizations. Consultants worked to develop consensus among

parties and build social capital to identify the goals and policies of the plan. Through the various outreach methods, more than 400 community members gained a greater understanding of the future of the downtown and provided feedback for the downtown planning document.

Challenges and Solutions

Challenge: Integrating feedback from numerous stakeholders was challenging. **Solution:** Lauren's team maintained an open dialogue with both the client and stakeholders to develop a Plan that serves all constituent groups involved in the planning process.

Challenge: The Town was limited in what it could offer as far as monetary incentives for investors to participate in the DDD Plan. **Solution:** Lauren investigated best practices used in similar communities and worked with Town leadership to develop a list of incentives that would be palatable throughout the 10-year life of the DDD Plan.

Satisfying the Client's Objectives

Lauren managed the downtown revitalization planning process to develop a DDD Plan for the Town. She coordinated the final adoption process with state agencies and the Town Council; the DDD Plan was adopted in March 2019. Lauren worked with the Town to apply for a State Downtown Development District during the 2019 round of requests; designation was awarded in August 2019. By achieving state designation, this area of the Town is now eligible for additional funding resources and programs offered through various state agencies.

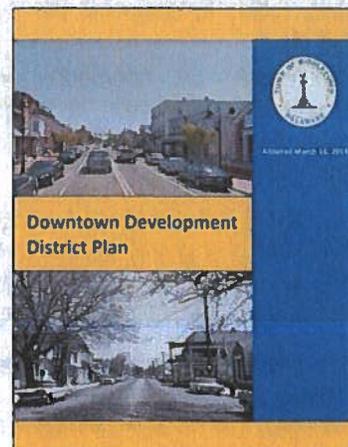
Client Contact

Kristen Krenzer | Town Clerk, PR & FOIA Coordinator
302.378.2711 x 223 | kkrenzer@middletownde.org

Fee: \$50K

Duration of Services: Original – 12mo; Actual – 18mo

Client requested revision to original scope to accommodate additional public outreach.



**Transportation Planning Study
Thoroughfare Plan**

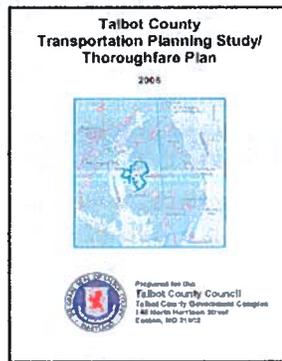
Relevance to the Comprehensive Plan Update 2020

- Countywide Plan
- Public Outreach
- Condition Inventory & Needs Analysis
- Transportation Infrastructure

Project Description

Wallace Montgomery (WM) conducted a county-wide transportation planning study with the following objectives:

- Quantify existing and future operations
- Highlight current and near-term operational and safety deficiencies
- Identify corridors of concern
- Incorporate required upgrades into the Maryland Department of Transportation State Highway Administration’s (MDOT SHA) Highway Needs Inventory program.



Project Scope of Services

Phase I: Phase I involved the following services:

- Field investigations and inventories to document roadway characteristics for all county roadways.
- Collecting turning movement counts at 42 intersections
- Forecasting near-term and long-term build-out potential throughout the county
- Quantifying localized and corridor wide upgrades required under existing, 2015, and 2030 analysis scenarios
- Analyzing existing and future conditions including capacity, speed, signal warrants, safety, roundabout feasibility
- Origin-destination study to determine the percent by-pass traffic along US 50.
- Developing concepts or near-term and long-term improvements and analyzing each to determine potential impacts and right-of-way needs
- Developing cost estimates

This study was instrumental in identifying funding opportunities, through the development of a priority list of needs for roadway improvements. This list of was presented to the MDOT SHA for the inclusion in the Consolidated Transportation Program.

Many of the county roadways intersect state roadways. Therefore, upgrades along county roadways would impact state roadway operations. Additionally, US 50 bisects Talbot County (north-south) and east-west travel across the county is essentially

prohibited during summer weekends due to the traffic congestion along US 50. The County considered the possibility of constructing overpasses over US 50 to promote east-west travel.

Public Outreach: The project involved extensive public coordination and outreach and an aggressive public meeting schedule including the following meetings.

- Individual meetings with local townships
- Meetings with public interest groups such as economic development panels and planning panels
- Large-area public meetings held at local fire-halls, libraries, and school auditoriums

In addition to the public meetings across the county, **WM** provided project updates to the Talbot County Council on numerous occasions. By engaging the public through a variety of public outreach methods and forums, **WM** obtained input that encompassed a wide range of perspectives to ensure that all possible and viable improvements were included in the recommendations and to build support for potential improvements.

Phase II: **WM** worked with Talbot County on moving forward two breakout projects resulting from the countywide planning study:

- Upgrade of Black Dog Alley from US 50 to Dover Road.
- Develop conceptual alternatives for a new interchange or intersection improvements for the US 50 and MD 322 intersection just north of Easton.

WM followed the format for the streamlined NEPA process for each project so that Talbot County could pursue various funding opportunities. The process included the following:

- Development of the project Purpose and Need statement
- Conducting an environmental inventory
- Developing alternatives
- Coordinating public and agency involvement.

Challenges and Solutions

Challenge: This was the first time this type of analysis was conducted countywide. **Solution:** We worked with the County on the approach and scope to meet needs in a reasonable cost-effective timeframe.

Satisfying the Client’s Objectives

WM provided Talbot County with a comprehensive transportation plan to help prioritize improvement projects and identify future capital improvement funding needs.

Client Contact

Ray Clarke, PE | County Engineer
410.770.8171 | rclarke@talbotcountymd.gov

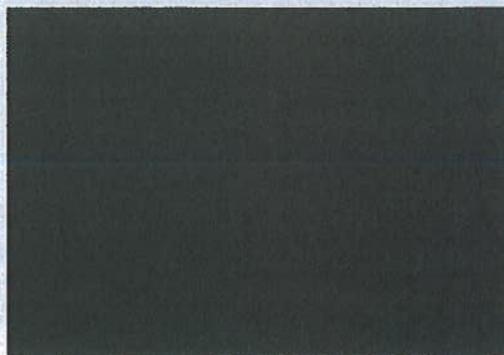
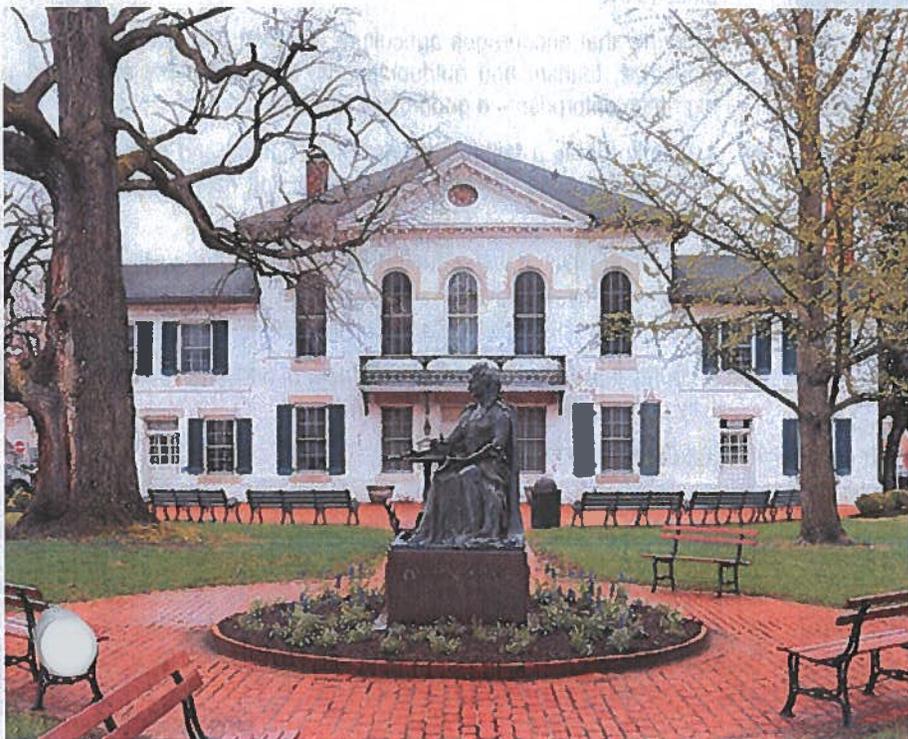
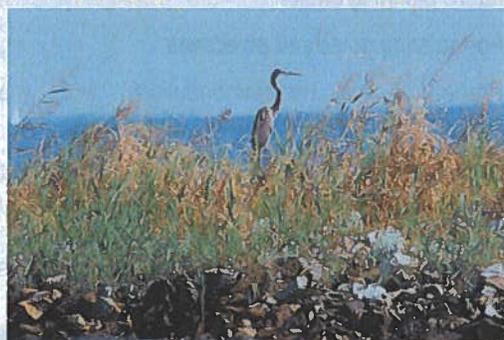
Fee: Original – 300K; Actual – 300K

Duration of Services: Original – 2 yrs; Actual – 2 yrs



Section 4

Project Services



Based on Wallace Montgomery's (WM) review of the RFP and our knowledge of Queen Anne's County and relevant documents, we have provided information and comments to the outlined requirements. During this project, the WM Team will provide professional services to support the County and Planning Commission in developing its Comprehensive Plan Update 2020.

We propose a multi-step planning process for preparing the Queen Anne's County Comprehensive Plan Update. This program entails the following steps:

- Analyzing existing conditions to provide a concise and accurate assessment of strengths, weaknesses, issues, and opportunities
- Fully analyzing the comprehensive plan, as well as other plans and studies
- Establishing a vision for the community as a foundation for future planning efforts
- Formulating goals and objectives
- Preparing final recommendations and implementation strategies that are measurable and specific

Our proposed work program will produce a meaningful and responsive comprehensive plan for Queen Anne's County. Should the County favor our approach, we will work closely with County staff and officials to further refine the process to meet specific local needs and requirements.

PROJECT UNDERSTANDING

Queen Anne's County, bordered by the Chester River and Kent County to the north; Caroline County and Delaware to the east; Wye River and Talbot County to the south; and the Chesapeake Bay to the west, is home to more than 50,000 people.

As one of the oldest sites of colonial settlement in the nation, the County exhibits traces of history across its extensive landscape. Residents have been farming the land and harvesting the water for centuries. Agriculture is now the County's principal economic activity, yielding corn, soybeans, wheat, barley, and vegetables.

The County is at the center of the four-county Stories of the Chesapeake Heritage Area and promotes heritage tourism, public access, and education, building community support for heritage preservation. Route 213, which bisects the County north-south from Kingstown to Wye Mills, is recognized as part of the Chesapeake Country National Scenic Byway, designated for its cultural and historic intrinsic values.

Due to its location, Queen Anne's County is often known as the "Gateway to the Eastern Shore," providing vehicular access from points west via the William Preston Lane, Jr. Memorial Bridge (Bay

Bridge). The County offers more than 495 miles of scenic shoreline, accompanied by acres of pastoral rural landscape, and working waterfront. It also offers residents, workers, and visitors a pleasant environment for living, working, and recreation. The County's natural resources play a great part in attracting visitors, who often become residents, enjoying the quality of life provided by public support for outdoor recreation activities such as boating, fishing, golfing, bird watching, biking, hiking, and sport shooting.

Queen Anne's County includes the eight incorporated municipalities of Barclay, Church Hill, Centreville, Millington, Queen Anne, Queenstown, Sudlersville, and Templeville. The County also includes six established planning areas: Chester, Stevensville, Kent Narrows, Grasonville, and joint planning areas with the towns of Queenstown and Centreville.

Strategically located business parks such as the Matapeake Business Park, Thompson Creek Business Park, Chesapeake Bay Business Park, and Centreville Business Park all offer a mix of manufacturing, flex-warehouse, and office space. Retail and commercial business is found mostly along the heavily travelled US Route 50/301 corridor, in addition to smaller presences within town centers.

Currently, the vision is to maintain the County's status as a quintessential rural community. Our approach would assist in preserving the overall character of the County:

- A predominantly rural county with small towns connected by creeks and country roads through fields and forest – a great place to live
- A county that encourages agriculture, seafood and maritime industries, tourism and outdoor sports, small business and high-tech enterprise – a good place to work
- A county that is a faithful steward of its natural and cultural heritage – a good neighbor for the Bay and other Eastern Shore counties
- A county in which development does not impair the quality of life enjoyed by all residents – a community that protects the expectations and opportunities of all its citizens
- A county that supports the highest quality of education that will fully prepare its citizens for the future

Project Goals and Objectives:

WM will re-assess the existing 2010 Comprehensive Plan, vision statement and plan elements that address land use; demographics; housing; business and economic growth; tourism; transportation; water and sewer infrastructure; historic and cultural preservation; the towns and villages; the countryside; natural features and environmental resources; and community facilities

and public services. Each section will be updated, as necessary, to reflect current conditions and to integrate new or revised policy prescriptions.

The updated Comprehensive Plan will include policy statements, goals, objectives, guidelines, maps, and graphics that will serve as a foundation for future land use decisions. It will include strategies for implementation that are consistent with the updated vision and may include recommended changes in local ordinances and policies, so the County can remain consistent with Plan recommendations.

Familiarity with Maryland Laws and Policies

The Maryland Land Use Article states that, once a planning commission is legislatively created, it has the function and duty to prepare a comprehensive plan for its jurisdiction and to present this plan to the local legislative or governing body for its consideration and adoption. The comprehensive plan must serve as a guide for public and private actions and decisions to ensure the development of public and private property in appropriate relationships. Each jurisdiction must review and, if necessary, update its comprehensive plan every ten years.

The Land Use Article also establishes a framework for the plan's content by requiring that it address certain components such as land use, transportation, community facilities, water resources, and goals and objectives.

In addition to the elements required by the Land Use Article, a planning commission is also required to implement 12 visions through the comprehensive plan:

Quality of Life & Sustainability	Public Participation	Growth Areas	Community Design
Infrastructure	Transportation	Housing	Economic Development
Environmental Protection	Resource Conservation	Stewardship	Implementation

Maryland Department of Planning Review of Comprehensive Plans

As the land use planning and policy arm of the state, the Maryland Department of Planning (MDP) promotes growth that fosters vibrant, livable communities, preserves and protects the environment, and makes efficient use of state resources. MDP works closely with Maryland's counties and municipalities in envisioning and guiding where and how future development, revitalization, and preservation will occur.

MDP, on behalf of the state, reviews comprehensive plans for consistency with the state's Smart Growth and growth management laws:

- *Land Use Article*, including the requirements for municipal growth, water resources, and priority preservation area elements;
- *State Economic Growth, Resource Protection, and Planning Policy* found in Subtitle 5-7A, known as the 12 Visions
- *Priority Funding Areas Act* found in Subtitle 5-7B of the *State Finance and Procurement Article*.

MDP's review and comment on local plans are provided as guidance to ensure local plans reflect the best possible land management policies and practices. Its comments are posted on the MDP website prior to the draft plan's scheduled public hearing.

Potential Issues:

In addition to other issues that will be identified and addressed throughout the comprehensive planning process, the County may wish to address the following potential issues in this update to the Comprehensive Plan:

- Sea level rise, flood vulnerability and resiliency, and increasing storm activity
- Moderately priced dwelling units (MPDU) and limitations to the current program for accomplishing the goal of increasing the number of MPDUs in the County
- Agricultural economic development
- Broadband and wireless telecommunication services
- Bay Bridge, traffic, and Chesapeake Bay Crossing Study

Potential Stakeholders:

Working on the County Comprehensive Plan update will involve interacting with diverse constituency and many stakeholders. While this is only an initial list of potential stakeholders, we anticipate working with members of these agencies and organizations:

- Queen Anne's County Departments
 - Planning and Zoning
 - Community Services
 - Tourism
 - Emergency Services
 - Parks and Recreation
 - Public Works
 - Roads
 - Trash and Recycling
 - Water and Sewer
 - Environment Health Department
- Queen Anne's County Commissioners
- Planning Commission
- Chamber of Commerce
- Kent Narrows Development Foundation
- Queen Anne's County Economic Development Commission

- Watershed organizations
- Heritage organizations
- Queen Anne's County Municipalities – Barclay, Church Hill, Centreville, Millington, Queen Anne, Queenstown, Sudlersville, Templeville
- Queen Anne's County Planning Areas – Chester, Stevensville, Kent Narrows, Grasonville

WALLACE MONTGOMERY'S PHILOSOPHY

The **WM** approach to comprehensive planning is centered around learning and listening. Our processes are designed to encourage participation, build consensus among both common and disparate groups, and help the community articulate its vision. We use our wealth of knowledge in public engagement; community building; planning; design; infrastructure and mobility; housing; sustainability; historic preservation; landscapes; and economic development to help our clients plan for a strong, resilient future. We are leaders in our professions and use our experience throughout the Mid-Atlantic to build a body of best practices that benefits our clients.

Challenges and Opportunities

Like all counties, Queen Anne's County has its challenges; however, in those challenges are hidden opportunities. We will work with the County to understand these challenges more comprehensively and to identify and explore how to make the most of those opportunities in real time. This will include looking for ways to accomplish the following objectives:

- Capitalize on natural assets and outdoor amenities
- Create and preserve unique neighborhood character
- Build and maintain partnerships with core stakeholders and community members to address needs and issues
- Catalyze community action toward achieving the overall vision

Driven by Data and Knowledge

Our learning and listening approach involves thorough research and analyses of current conditions and trends. We will collect and analyze data from all available sources to help better understand existing conditions in the County. We employ the extensive capabilities of GIS in our planning analysis and will ensure that our analysis is supported by high-quality existing data as well as properly developed and managed original datasets compiled through the planning process. We will use GIS technologies to encourage citizen engagement and capture the wide range of local knowledge held by residents. Using the best available data, we will interrogate GIS and demographic data to extract land use characteristics and relate them to planning objectives.

Our approach will result in a plan that is firmly grounded in economic and demographic realities, even as it reaches toward the future.

We will also identify creative ideas and best practices used in other communities that could benefit Queen Anne's County. We will review relevant policies, plans, and studies and use the extensive work the County has completed prior to this plan to inform our process and lay a solid foundation for the Comprehensive Plan update.

Founded on Vision

Planning is the art and science of identifying issues, forecasting change, and ultimately creating a vision that moves the community forward in a way that minimizes challenges and risk and maximizes a sustainable future. Planning is important because it requires a community to assess its strengths and weaknesses; it facilitates conversation and visioning; and it represents a consensus opinion on what the community should be in the future. Good plans also provide guidance on how to implement goals, policies, and actions. Our plans include a robust implementation element that provides actionable guidance for our clients. For plans to be effective, they must meet the following criteria:

Must be compelling. The Plan must have a clear vision of the future that makes residents, land owners, community leaders, and developers want to work toward its fulfillment. This vision is usually expressed as a concise vision statement and a series of well-thought-out goals and actions.

Must be written for lay readers. The work that goes into plans is often complex and involves navigating local, state, and federal programs, issues, and research that can be difficult for lay readers to understand. One of the primary roles of planners is to understand these complex issues, programs, and information sources; determine how they may impact or benefit their communities; and then communicate what they know simply and truthfully so that the community can understand their choices and determine their best course of action. That course of action is typically written as a plan. The written document needs to be complete without being overly long or complex and should be free of unnecessary jargon.

Must be implementable. A plan that isn't implemented is worse than no plan at all. Successful planning harnesses the energy and talents of the community and creates excitement and expectation. Plans that result from that process but only sit on a shelf destroy public trust; damage the reputation of planners and community leaders; and make the next honest planning effort more difficult.

Must be sustainable. For a community to thrive and be livable and healthy, the plan must meet the needs of current and future residents. The American Planning Association's *Planning for Sustainable Places* notes that communities accomplish this by balancing economic, environmental, and social resources; incorporating strategies for resilience; and linking local issues and action to regional, national, and global concerns.

Sensitive to Place and Context

The **WM** Team will use a place-based planning approach. Place-based plans reflect historic character and vernacular architecture

and respect the interrelatedness of land use, mobility, utilities, community health, the environment, and economic well-being. They are often a physical representation of the community's core beliefs and planning principles.

Our place-based planning approach sets the stage for seamless integration of those place-identified principles in land use code updates.

Inclusive and Engaging

An effective plan will require robust public outreach. The WM Team has decades of experience leading public engagement activities including educational and decision-making meetings. Holding effective meetings is critical to keeping people actively engaged in the project and directly impacts the quantity and quality of input provided by the public. Additionally, project schedules are dependent on successful and effective meeting outcomes. Our Team members are experts in facilitating conclusive and meaningful input sessions that impact the final product.

Every community is different and public engagement should be tailored to meet a community's specific needs; therefore, the WM Team believes it is critical to define public engagement goals, desired methods, and a schedule. It is important that we develop the public engagement plan with the participation of County staff and Planning Commission members and include the following information:

HOW the public will be engaged in the process: charrette; informational meetings; website; press releases; email; and social media. Our Team often uses Facebook and Twitter to communicate plan progress, meetings, and reports. We also employ online surveys and web maps to gather community input.

WHO will be the target audience of specific engagement strategies such as the public, specific stakeholders, and youth. It is important to obtain broad representation of the community and its various segments, especially disadvantaged and hard-to-reach populations. Our Team will work to ensure County residents are aware of the planning effort and have an opportunity to meaningfully engage in the process.

WHEN in the process methods of engagement will be used, whether continuous or discrete.

WHERE public engagement will occur, such as in a County government building, local schools, parks, libraries, or during local events and activities.

WHY particular engagement strategies are needed to help ensure that the entire community has more than one way to contribute and be involved.

WHAT is needed from each type of engagement activity, so we understand how the results of the engagement will be used to inform the Plan.

In addition to answering these core questions, the public engagement plan will detail who — WM Team or County staff — will lead and provide support on each engagement area. We prefer a multi-faceted approach that includes the following tasks:

Creation of a Steering Committee. We are glad to see the County's intention to have the Planning Commission serve in this capacity. Steering committees guide the planning process and serve as an invaluable member of the planning team. They provide insight and direction, review draft products, resolve conflict, and serve as an advocate of the plan with the public and Board of County Commissioners.

Branding. Branding products and events related to the planning process is a useful way to draw attention to, and set apart products and initiatives related to, the planning process.

Stakeholder Interviews. There will be many perspectives to balance as we engage stakeholders and gather feedback on the future of Queen Anne's County, such as those of local officials; the school district; housing authorities; economic development partners; utility and service providers; and social organizations concerned with community initiatives. Stakeholder interviews may be conducted one-on-one, remotely, in small- to mid-sized groups in a public workshop setting, using online feedback tools, or through a combination of the above.

Project Website and Social Media Campaign. An interactive project website provides community members with an online portal to download draft documents, provide comments, view upcoming meeting dates, and monitor the plan process. The website can include a series of short surveys or 'quick polls' to gain community input on a range of topics. Additionally, appropriate social media platforms and press announcements could be used as an extension of the website, to inform a wide array of users of the Plan's status. Interactive web mapping content will also be used to communicate plan elements, existing conditions, and development patterns to the community and will also provide an additional means of soliciting input.

Surveys. Community surveys provide great insight into the needs and desires of County residents. We plan on two types: a community survey similar to what many municipalities may be familiar with, and a series of short surveys on particular topics — we call these 'quick polls.' These might relate to housing type preference, a specific policy change, or proposed development standards.

Kick-off Event. A kick-off event (or series of events) introduces the public to the planning process; solicits general, initial thoughts and ideas; and establishes expectations for the rest of the project.

Visioning Workshops. Conducting in-depth, hands-on workshops or events helps to facilitate greater buy-in and ongoing community involvement. These workshops may extend into the local schools, underserved neighborhoods, or other areas of the community not often targeted for outreach and input.

Outreach Events. We strive to make planning fun and productive. A series of active/participatory community-wide events can be incorporated into our approach with the intent to educate and engage community members who might otherwise have no interaction with the planning process. We approach them in settings such as music concerts, farmers' markets, or other public events and activities specific to Queen Anne's County.

The activities described above are reflected in the phases and tasks we have proposed to accomplish the project scope outlined in the RFP; however, we are able to employ a full suite of outreach activities throughout any comprehensive planning process.

Management Plan

At **WM**, we pride ourselves on developing close relationships with our clients and true team approach to understanding project needs; developing potential solutions; and selecting an appropriate approach to bring a community's vision into reality, while maintaining compliance with regulatory and agency requirements. For this project, **WM** has selected a project team with outstanding technical expertise in the fields of land use planning; water resources; the environment; historic and cultural preservation; transportation; GIS and data analysis; graphics; public outreach; and civic engagement. Our Team has a full understanding of regulatory requirements and excellent working relationships with key state representatives; we maintain continual contact with these representatives to stay abreast of the changes, challenges, and needs of the communities we serve – which better enables us to develop context-specific and responsive solutions.

WM utilizes an internal quality assurance/quality control (QA/QC) program to control the accuracy and completeness of work; ensure adherence to appropriate planning criteria; incorporate implementation practicability; and monitor budgets and schedules. The program was developed, and is routinely updated by, a standing committee composed of employees from all experience levels and service areas in the firm. This holistic approach fosters and promotes quality and has resulted in a process and manual that is used by everyone in our organization. Our QA/QC program ensures our clients receive a high-quality product that exceeds normal expectations for professional planning services. It emphasizes lessons learned and the need to educate our staff; document and verify work; cooperate internally and with our client; and communicate effectively. It focuses on a process that results in accurate planning documents and includes measures to protect the project budget and schedule.

Lauren Good, AICP is **WM's** Project Manager for the Comprehensive Plan update. Early in project initiation, Lauren will work with the Queen Anne's County staff to develop a communication and management plan. Lauren will have day-to-day quality control responsibility; she will track the project progress and resources on a weekly basis and raise to the County any actions that need immediate assistance. In addition, she will hold monthly status meetings with the technical project team, so all team members are aware of progress, schedule, and upcoming

deliverable needs. Each week she will check the hours, as well as the budget, to ensure that there are no unforeseen issues and that we are efficiently using our resources. Lauren will work closely with Ray Moravec, PE who is the project's QA/QC Manager.

COMPREHENSIVE PLAN UPDATE APPROACH

The following approach is based on our understanding of the County's existing Comprehensive Plan and its intent to update this Plan; the County's desire for public outreach; and our assumption that Queen Anne's County desires a Plan that will set a high bar and inspire the community toward positive growth and vitality.

Coordination meetings with County staff will be scheduled each month to ensure the project is on track. Meetings will be held in person, via conference call, or using video conference software. The team will also attend in-person coordination meetings when in the County for scheduled trips.

Documents will be generated in MS Word or Adobe InDesign and shared as PDFs during the Plan's creation. Editing will be completed in either MS Word or using the Adobe review capabilities and redlined or annotated versions of draft documents will be created as necessary. At the end of the planning process, final materials will be transmitted to the County in their native format and as a PDF.

All mapping and spatial data analysis will be completed using Esri's ArcGIS platform and will primarily utilize GIS data from trusted sources as needed and available. GIS data will be created, managed, and provided in a mutually agreed-upon format at the project's completion. Web mapping applications developed specifically for this plan update may, if desired, be transferred to the County upon project completion or may be hosted by **WM**, subject to future agreements.

The proposed work program, outlined below, divides the project into discrete, logical steps. Tasks are laid out in a logical order; however, many of the tasks may be conducted simultaneously.

Task 1 – Development of a Detailed Scope of Work

To kick-off the planning process on the right foot, a meeting will be held with County staff, and additional identified key representatives such as the Planning Commission Chair, to discuss the project scope, deliverables, meeting schedule, and other project/process related items. This meeting is a great opportunity to obtain local feedback on several topics to help organize the project:

- Determining local resources and availability
- Discussing outreach methods and potential existing events
- Identifying a project point of contact
- Identifying available GIS base data
- Considering potential scheduling conflicts
- Reviewing relevant code requirements (including county, state, and federal)
- Reviewing the plan adoption process
- Discussing opportunities to provide information throughout the life of the project

Regular and as-needed meetings and conference calls with County staff and/or designated members of the Planning Commission will be held throughout the planning process to ensure open communication and exchange of ideas.

Task 1 Deliverables

- Detailed Scope of Work

Duration: 15 days

Stakeholders / Review Agencies: County

Task 2 – Project Initiation, Conditions, Participation & Issues

Task 2 focuses on organization and serves as the research, diagnostic, and visioning phase on which the balance of the comprehensive plan work will rely. A formal project kick-off will be held with County planning and zoning staff, members of the Planning Commission, and the public.

Additionally, we will develop a Plan brand that is compelling and reflects the project's intent. We find it is helpful to unify messaging by creating a brand for projects that links outreach elements and public perception to a theme that is visually appealing and easily recognizable.

The WM Team will also work with County staff to identify key stakeholders that should be engaged during the project and begin outreach to these individuals and groups as soon as possible.

Task 2.1: Initiate Project and Analyze Existing Conditions

Project Initiation Meetings

Before much actual work begins, a project initiation meeting will be held to set the foundation for the planning program and review and discuss the overall direction and policy issues facing the County. Participants in the project initiation meeting would include County staff, members of the Planning Commission, and key personnel from the WM Team. The meeting will fulfill the following key objectives:

- Reviewing overall project objectives
- Refining the project's work program
- Reviewing and establishing roles and responsibilities for all parties involved throughout the process
- Establishing a project schedule

The project initiation meeting will conclude with a Project Initiation Workshop, intended to solicit the views of Planning Commission and staff members regarding their concerns and aspirations for the County.

One of the first exercises we will suggest is an analysis of the County's strengths, weaknesses, opportunities, and threats (SWOT). The SWOT analysis is useful as it provides unbiased, anonymous information from those working at various levels within County government. We recommend that the simple worksheet forms be forwarded to, and filled out by, elected and appointed officials, boards, committees, and all County staff. All information is combined and provided back verbatim to the Planning

Commission/County staff and is also catalogued by topic to see where issues lie. Results are presented at a future Planning Commission meeting or workshop.

It is often illuminating when some members of the governing and administrative community view items as strengths and others view the same as weaknesses. This exercise can be accomplished either through anonymous email remitted directly to the consultant or via an online survey tool, such as Survey Monkey – both options ensure responses are kept anonymous.

Collection and Review of Baseline Information

Prior to any meetings, WM begins the initial planning process by reviewing existing documents including the County's 2010 Comprehensive Plan; amendments; the community plans for the County's established Planning areas; annual reports; meeting minutes from the Planning Commission and Board of County Commissioners; codes and ordinances; and the website. WM also reviews government structure to better understand the County's needs and identify areas for consideration in the comprehensive planning process.

Data collection is one of the most important phases during the process, since it empowers us to use information to mold the document, justify trends, and assist in making decisions throughout the planning process. We break the data collection phase into three components: County, other government, and mapping.

County

Every jurisdiction collects data on a routine basis for items such as rental and vacant property licensing, building permits, and land development applications (among other items). This is valuable localized information. We will work with County staff to review and obtain the data in its original format (e.g., County software system output, Excel spreadsheet, Word document). Our team includes former state, County, and municipal employees: We understand the volume of work that occurs during a normal government workday, as well as the number of interruptions that government employees must contend with. To facilitate the data collection process, we have developed a data collection questionnaire document in Microsoft Word that is easy to complete and assists in identifying the information that is available from the County. We typically advise that this questionnaire be completed within the first 30 days of a project, depending on staff availability, which we work around until we receive the requested information.

It is helpful to have additional conversations with department heads or liaisons to further determine relevant projects and initiatives that have been completed, are planned, or are currently underway. We have a reputation of working well with other consulting firms. We leverage these relationships if the other firms have had heavy involvement with a particularly large project, discipline, or existing relevant data. We always consider these firms to be contributing partners in any planning process. Once we better understand which projects should be completed, we can also add experts to

our Team who can provide complementary knowledge and experience.

In addition to the data questionnaire, data collection, and department head/liason conversations, we anticipate reviewing, at a minimum, the following County documents:

- 2010 County Comprehensive Plan and appendices
- 2007 Chester/Stevensville Community Plan
- 2010 Grasonville Community Plan
- 2006 Kent Narrows Community Plan
- Zoning and Subdivision Regulations
- Design Manual
- 2017 Land Preservation, Parks and Recreation Plan
- Comprehensive Water and Sewer Plan
- 2019 Multi-Jurisdictional Hazard Mitigation Plan
- 2018 Economic Overview
- 2015 Economic Development Commission Ten-Year Strategic Plan
- 2016 Affordable Housing Assessment
- 2018 Annual Report on Homelessness
- 2016 Sea Level Rise and Coastal Vulnerability Assessment and Implementation Plan
- 2004 Early Action Compact Modeling

Other Government

While we are collecting County data, we concurrently collect data from the state and federal governments, as well as any municipalities that may be impacted by the planning process. Our data collection effort includes initiatives, guidelines, plans, studies, annual reports, and regulations. Typically, significant portions of information come from the US Census Bureau – specifically, either from the Decennial Census or the American Community Survey, the latter of which is scheduled for release every December. Below, we include an abbreviated list of some resources that we rely on and are frequently used for a variety of planning efforts:

- US Decennial Census
- American Community Survey
- Population Estimates and Projections
- A Better Maryland – State Development Plan
- Maryland Department of Transportation (MDOT) Bicycle and Pedestrian Master Plan
- Consolidated Transportation Program
- Maryland Trails Strategic Implementation Plan
- Maryland Transportation Plan
- Local Watershed Plan
- MDP Annual Report
- MDP Models and Guidelines Series
- Multi-Hazard Mitigation Plans
- Adopted Comprehensive Plans for Incorporated Jurisdictions within the County (e.g., Barclay, Church Hill, Centreville, Millington, Queen Anne, Queenstown, Sudlersville, Templeville)

Mapping

We will also acquire any GIS datasets owned or maintained by Queen Anne's County and state or federal agencies that are applicable to the development of the Comprehensive Plan. Where appropriate, we will utilize the information available through the State of Maryland's iMAP data portal or the Maryland Historical Trust's Cultural Resource Information System, Medusa. In the event that any purchase of data is required, WM will request County staff to coordinate the acquisition of this information, as most data owners are other government agencies and typically have data sharing agreements to provide this information free of charge to other government entities. Any GIS data acquired or developed during this project will be transmitted to the County at the end of the project. Our staff is also actively involved in MSGIC, the Maryland State Geographic Information Committee, and maintains excellent working relationships with other data owners. These relationships will help expedite the identification and acquisition of needed base data.

Existing Condition Inventory and Projected Needs Analysis

This step will include analyzing existing conditions and future potential conditions within the community. The analyses will be based on information obtained during our collection and review of baseline information and may be amended to include feedback from community service providers; reconnaissance; surveys; inventories; and analyses. We will emphasize identifying existing conditions to be considered during the formulation of goals, objectives, and planning recommendations.

The project team takes a forward-thinking approach in terms of identifying community needs and desires and testing those assumptions based on demographic and behavioral trends. The project team will conduct a trends analysis to identify potential changes to the County's demographic profile and behavioral trends in terms of how people interact with their communities. We will use information from the community profile assessment and survey components with well-documented literature on behavioral and socio-economic drivers to examine potential behavioral and psychographic characteristics associated with the County's changing and growing population. The trends analysis will help the project team identify how the County's community profile is likely to change and anticipate community needs and desires into the future.

In conducting these existing condition inventories and projected needs analyses, we will also use current and available data to complete GIS-based data analyses, when appropriate.

Studies, Plans, and Reports

We will assemble and review the previously prepared plans and studies to influence the updated Comprehensive Plan. It is important to recognize the amount of time and resources invested in these plans and discern the information that remains useful and relevant to the Comprehensive Plan process. Reviewing these documents will determine the following information:

- Recently adopted policies that need to be reflected in the new Comprehensive Plan
- Changes within the community that have taken place since the previous Plan was prepared
- Inconsistencies between plans and reports
- Relevance of previously collected data
- Gaps in data that must be corrected as part of the comprehensive planning process

We will review the land development plans of the County's eight incorporated towns for consistency regarding municipal growth areas, Priority Funding Areas, and other applicable provisions.

Zoning and Development Controls

We will assess all the County's regulatory controls – including the Zoning Code and zoning boundaries, Subdivision Code – to identify strengths and weaknesses and to determine how these controls may influence land use and opportunities for new development or redevelopment.

Population/Demographic Analysis

We will use the US Decennial Census and American Community Survey, among other similar data sources, to conduct an analysis of existing conditions and trends within Queen Anne's County. It is imperative that Comprehensive Plan recommendations are grounded in market and economic realities, particularly as it relates to housing and employment.

This analysis will highlight socioeconomic data including, but not limited to, households by age and income; race and ethnicity; shifts in population and households; consumer expenditure data; and labor/employment. Demographic data will serve to inform the assessment of short-, mid-, and long-term development potentials. Local and regional population projections will be factored when evaluating future demand for housing, goods, services, and employment.

Housing

Information will be gathered with regard to existing housing stock and residential development activity in the County. Attention will focus on housing quality, distribution, density, and price points. Based on the existing housing stock within the County and both current and projected demographics, we will complete a housing gap analysis. The gap analysis will determine whether a deficit or surplus of housing units exists for households at various income bands for rental and for-sale housing.

Population and Housing Projections

Using information from the population/demographic analysis, population projections will be developed through the year 2030. There are a variety of ways to develop projections. The Maryland Department of Planning developed projections through the year 2040 in 2010. The US Census provides population projections each year based on the last decennial census. Information from each of these sources can be extrapolated and used to develop local projections for both population and housing estimates that are

either conservative or liberal estimates, depending on how much risk the County would like to take for estimating purposes.

Land Use and Development

The Comprehensive Plan will serve as the primary policy guide for short- and long-range planning, zoning, and decision-making within the County and will serve as a necessary first step and guideline toward systematic revision of the County's land use and development regulations.

We will prepare an existing land use map that inventories parcels within the County, excluding parcels that are within incorporated municipalities. Each parcel will be assigned a land use by utilizing the State Department of Assessment and Taxation's use description. The Maryland Department of Planning's Land Use/Land Cover dataset may also be used as reference. (Should more detailed existing land use analysis be desired, this can be provided at additional cost.) The map will then be analyzed to identify functional land use areas, compatible and incompatible land use arrangements, and other issues related to land use and existing development conditions. This analysis can be expanded to include a more detailed look at permitted uses, special uses, variances, etc. as an add-on service.

We will identify jurisdictional boundaries and areas that have already been identified for future annexation by the incorporated municipalities within the County, also identifying additional issues that may require intergovernmental coordination.

Drawing from the various stages of public input outlined in this proposal, as well as technical analyses and input from various stakeholders and County officials, we will develop a land use analysis and future land use plan for Queen Anne's County.

To create the land use plan for the County, our Team will perform the following tasks:

- Conduct a development capacity analysis, examining land mass by acreage, zoning, serviceability, and land use designations to produce projected growth scenarios for Queen Anne's County. This information will be provided to the public and stakeholders during the public outreach process.
- Identify potential redevelopment areas including infill and adaptive reuse areas and opportunities and determine redevelopment strategies to initiate the process.
- Provide clear direction of where and how development should occur over the plan's lifecycle. Input from the community and stakeholders will help in determining this direction.

The plan will address and depict the location and balance of different land uses, including location, design, character, and density, accompanied by the interconnection between land uses, the built environment, the socio-economic and the natural environment, to guide future growth and development. The plan, and the public input process, will focus on how various land uses and future development will interact with the rural character found in the County and will discuss how transportation planning, open

space and recreation improvements, and economic/commercial enhancements can further drive these interactions.

In tandem with the land use analysis, we will evaluate priority funding areas, priority preservation areas, and economic development and tourism, including consideration for emerging economic development opportunities.

Community Facilities and Infrastructure

We will conduct an inventory and analysis of major public and private facilities and services and infrastructure providers and owners. These inventory and analysis will be completed in conjunction with those needed but covered more completely under the Environmental Features and Open Space, Water Resources, Transportation and Mobility, or Historic and Cultural Preservation topics. Facilities and services will be evaluated with respect to age, condition, capacity, demand, and the need for future improvement. Our Team will prepare a facilities survey questionnaire to be sent to all service and facility providers within the County. This will include, but not be limited to police, fire, libraries, parks and recreation, and schools. Our Team will use the results of the survey, together with other research, to prepare the inventory, analysis, and mapping of existing community facilities.

Environmental Features and Open Space

We understand the importance and influence that the environment has in shaping our daily lives and how it impacts our patterns of land use. This is particularly important considering changing weather patterns and rising sea levels. Our Team will review, inventory, and analyze the County's open space and environmental features, including all County parks and recreation facilities; areas of natural environment; water features; and other natural and human-made features that add to the County's special image and character. We will identify the benefits, problems, concerns, strengths, and opportunities for improvement of these resources and will seek to incorporate consideration of the resources throughout the plan.

We will perform the following specific identification, evaluation, and analysis:

- Chesapeake Bay Critical Areas
- Habitats for Threatened and Endangered Species
- Floodplains
- Steep Slopes
- Streams and Stream Buffers
- Wetlands
- Erosion Hazard Areas
- Shore Buffers
- Woodlands/Forests
- Currently Impaired Waters
- High-Quality Waters
- TMDLs
- Natural Areas and Wildlife Habitats
- Other Sensitive Areas

Within this topic area, we will address environmentally sensitive areas; resource areas; water resources; hazard mitigation and sea level rise/coastal resiliency; fisheries; mineral resources; and resource protection, conservation, and preservation. We will review the regulatory protections provided to these natural resources within the Zoning Code and identify opportunities to improve these protections to the degree desired by the community. Additionally, we will review the status of the County's stormwater management needs and discuss potential impacts of future regulation under the State's National Pollutant Discharge and Elimination System (NPDES) authority.

Coupled with these evaluations, we will provide an assessment of Watershed Implementation Plans (WIP) that are in effect or are under development.

We will also include discussions of existing environmental initiatives and include enhanced strategies such as hazard mitigation and coastal resiliency initiatives.

Water Resources

The WM Team will review and update the Water Resources Element, streamlining components between the 2010 Comprehensive Plan and 2011 Comprehensive Water and Sewerage Plan. We will provide an assessment of impacts of existing and projected growth on the County's water resource limitations, challenges, and solutions identified as part of the Environmental Features analyses outlined above.

As part of the analysis, we will consider:

- Land use planning in the geographical context of watersheds
- Estimated nutrient discharges for total nitrogen and phosphorus
- TMDLs for total phosphorus and total nitrogen by eight-digit watershed
- Drinking water supply to support current and future populations
- Drinking water treatment plant capacity
- Wastewater capacity to support current and future populations
- Wastewater treatment plant capacity
- Stormwater impacts on water resources with respect to total nitrogen and phosphorus
- Best management practices

Transportation and Mobility

We will undertake an analysis of the County's existing transportation infrastructure. This will encompass the existing street system, bike and pedestrian facilities, public transportation, and overall traffic management. The analysis will help us develop recommendations that would improve access and control, linkages and connectivity, and overall safety and efficiency. Our analysis will include discussions and consideration of other jurisdictional transportation efforts including state, regional, and other planning levels.

Transportation analyses will include local transportation plans in addition to the Maryland Transportation Authority Chesapeake Bay Crossing Study. Currently, the range of alternative corridors have been narrowed to three plus a no-build option. Two of the corridors being carried forward for additional evaluation have a direct impact on Queen Anne's County:

- Corridor 6: MD 100 to US 301 between Pasadena, Rock Hall, and Centreville
- Corridor 7/Existing Corridor: US 50/301 to US 50 between Crofton and Queenstown

While the study's Final Environmental Impact Statement (FEIS) won't be published until summer 2021, it is anticipated that the Draft EIS and identification of the recommended preferred corridor alternative will be published in spring/summer 2020, within the scope of the County's Plan update. The WM Team will remain fully abreast of information provided through the Study and will incorporate pertinent information and analyses accordingly.

Historic and Cultural Preservation

Queen Anne's County is widely recognized across Maryland for the quality, age, and extent of its heritage resources – including historic sites and districts, both rural and town-based – plus cultural and interpretive resources. The County is at the center of the four-county Stories of the Chesapeake Heritage Area (as certified by the Maryland Heritage Areas Authority) and promotes heritage tourism, public access, and education that build community support for heritage preservation. The WM Team's review of heritage resources will be undertaken using existing inventories and surveys, supplemented by field review and consultations with local stakeholders, review of the 2005 heritage area management plan, and review of the use of state and federal historic preservation tax incentives. Gaps in existing information will be identified and the team will consult with the County on ways to fill those gaps, if necessary. Recommendations for added, in-depth surveys can be made as part of the Comprehensive Plan for long-term implementation.

Existing resources will be mapped using GIS data available through the Maryland Historical Trust's Medusa system. References for assessment of heritage resource existing conditions include:

- National Park Service Bulletin 30, *Guidelines for Evaluating and Documenting Rural Historic Landscapes* (Keller, et al.)
- National Park Service Bulletin 36, *Protecting Cultural Landscapes: Planning, Treatment and Management of Historic Landscapes* (Birnbaum)

The review will consider the general type, number, distribution, character, and condition of heritage resources, settlement and land use patterns, circulation networks, and natural systems that contribute to the County's overall cultural landscape and will identify vulnerabilities and opportunities for community investment, including the arts and museums as well as historic preservation.

In a rural area, historic preservation planning frequently overlaps with conservation planning, so the WM Team will also review background information on existing stewardship and conservation initiatives and assess programs and issues related not only to historic preservation, but also agricultural preservation, open space preservation, the conservation of environmentally sensitive ecosystems, and maintenance of the public domain.

The final preservation element will discuss findings and address opportunities available through both typical historic preservation programs and other County programs for planning and development, as well as heritage tourism, which can affect the local economy – not only through tourism dollars but through image and branding to attract investors and residents – and build residents' enjoyment of the County's history, resources, and experiences.

Growth Area Analysis

We will perform an analysis of the areas identified for future growth to determine opportunities, constraints, and obstacles that may exist. This analysis will take into consideration existing land uses and development; incorporated jurisdictions' growth areas; neighboring communities' plans and influences; availability of infrastructure; water; impact on County services; and related factors. The result of this analysis will allow the County to better plan assess where and when future resources will be needed.

Issues and Opportunities Inventory

Based on information developed from the previously mentioned existing condition inventories, needs analysis, and project initiation workshop, the WM Team will begin to develop an inventory of strengths, weaknesses, opportunities, and threats. These will include verbatim submissions (identification of submitters will be kept anonymous) and will also be categorized into topical area for future use in developing plan chapters, goal setting, and objectives.

Task 2.2: Citizen and Business Community Participation

While incorporating several components, this task offers the single greatest opportunity for meaningful, hands-on involvement of Queen Anne's County stakeholders and the public in general in the creation of the Comprehensive Plan. This process will provide multiple forums for the public to engage in discussions regarding the Comprehensive Plan and its contents. We will organize the participatory events in a fashion that maximizes opportunity for the public to directly provide their input on the future of their community and that seeks to gain broad consent for the Plan's content.

Finalization of a Public Engagement Plan

Public participation and community engagement are the cornerstones of our proposed planning process. Our public participation process includes both traditional (face-to-face) and Web-based activities to obtain the broadest levels of participation in preparing the Queen Anne's County Comprehensive Plan. We will include these activities throughout the entire planning process.

At the outset of the project, we will work with the County to define a public engagement plan to create the comprehensive plan. The purpose of public engagement and outreach is to communicate and gain valuable input from a broad cross-section of the County to collectively shape the vision and the overall Comprehensive Plan. The effort must create understanding about the intent of the Plan and the planning process and create interest in, and good will, toward the Plan. The outreach effort should also effectively inform citizens about the regulations and laws relevant to the Plan, and about land use planning in general. This will allow the public to more effectively serve as knowledgeable participants in discussions about the County's comprehensive planning effort and their vision for Queen Anne's County.

The process of gaining input from the broader community must be efficient; help citizens identify ideas, opportunities, and concerns in a productive manner; and should represent an enjoyable and fun process for everyone. The visioning and outreach process should employ a broad range of tools to engage all citizens. A cornerstone of our Team's approach to facilitating public meetings and workshops is to meet people where they live: at neighborhood schools and senior centers distributed across the County, rather than only holding meetings at the County government building.

Similarly, in developing the public engagement plan, we must also be cognizant that people's time is more constrained than ever; therefore, we need to provide flexibility in the time and manner that the public provides input. One way that we can address this constraint is by utilizing technology to inform the public on existing and proposed planning elements. Specifically, we will implement a web-based mapping component to our engagement plan that provides the public with easy to understand graphics depicting land use elements. This tool will allow us to communicate existing conditions, demographics, and regulatory constraints as well as displaying proposed Plan elements. We will also include functionality to allow the public to submit comments on the Plan elements through the map application. Our experience using web mapping tools has shown that people embrace these tools, that they are generally easy to use and interact with, and that they provide the flexibility needed to allow as much interaction and engagement in the planning process as possible. Additionally, this approach allows us to gather hyper-local knowledge of conditions that often escapes wider-scale analysis. We can then use this local information to further shape and refine the plan proposals.

Project Branding

Creating a brand for the Queen Anne's County Comprehensive Plan will stimulate community interest and link the various tools and methods for community outreach under one umbrella. Developing an instantly recognizable brand (message or image) means that the process will have a higher profile in the minds of community members. Elements of community outreach – including meeting advertisements; visual displays for presentations; handouts for public meetings; the project website; and the final planning documents – will all have a design and follow a format that is consistent, compelling, and appropriate for various

audiences and for various meetings and communications. The leadership in the community is committed to ensuring that this process has great value, so it is important to link the comprehensive plan process and its benefits in the minds of community members.

Media Plan

Successful community outreach will require a strategic plan for utilizing media to deliver a clear, consistent message about the purpose of, and the process for, the Comprehensive Plan. The media can play a valuable role in educating community members about the key issues, providing information about visioning events, highlighting opportunities for input, and distributing information.

Social Media

Social media functions similarly to traditional print media, except that it uses community-based communication channels such as existing community newsletters and meetings and church and service organization communication channels. This method can be particularly effective in reaching out to groups that may not have been traditionally involved in public planning conversations. We have found that stakeholder groups and other citizen leaders can provide great leads and connections that help the team find and use social media options. This proposal assumes that, in addition to the WM Team, County staff and Planning Commission members would help the social media outreach effort by coordinating submittals to local newsletters; generating interest in meetings concerning the Plan around the community; and helping to stimulate interest in the Plan. Additionally, embracing a robust social media outreach effort can help to attract input from younger residents who often are not inclined to participate in public meetings. This will include outreach through Facebook, Twitter, and other social media platforms.

Leadership of Planning Commission/Staff Input Process

We will work with County staff to interact and collaborate with the Planning Commission to guide the comprehensive planning process. The Planning Commission will also serve as a key channel in publicizing the planning effort in the broader community and communicating with people in Queen Anne's County concerning upcoming events and opportunity to provide input for the new Plan (both in person and in online applications). We propose meeting with the Planning Commission concurrently with regular meetings with County staff to review project progress and updates throughout the process. The Planning Commission will assist our Team by reviewing draft content and material for public outreach activities (such as public meetings and online information dispersal), as well as draft content for the various sections of the overall Comprehensive Plan document throughout the project's progression. The Planning Commission will also review the input received from public engagement, through various sources, outlined in other parts of the scope of work.

These meetings will be conducted during regularly scheduled work sessions that will be open to the public. We anticipate that the work

sessions will be held outside of the regular monthly Planning Commission meetings.

Regular Briefings for the Board of County Commissioners

In addition to the formal reviews of the finished version of the comprehensive plan document near the end of the project, we will provide information for briefings to the Board of County Commissioners on a monthly basis throughout the project. This work plan assumes that County staff will be responsible for making these formal briefings to the County Commissioners to update them on team activities, results from surveys and public workshops, and other general progress information, unless otherwise noted. Should the County desire the team's Project Manager or other key staff to attend a meeting of the Board of County Commissioners not otherwise addressed in the scope of work, we can accommodate the request on a per-meeting basis.

Identify Stakeholders and Maintain Contact List

The WM Team will identify and develop a database of stakeholders, which will include information pertaining to key issues that are important to each stakeholder. The database will be updated and maintained throughout the project as a resource for communicating with stakeholders.

A property owner contact mailing list will be incorporated as part of the Stakeholder Database. This information will be obtained from stakeholder surveys as well as project mailing list sign ups.

Community Survey

The project team's plan will conduct a community survey. Information from the survey will be used to assess residents' perceptions of the County; desires for future redevelopment; community needs; and other key topic areas. The project team anticipates that the survey will collect data related to the following areas:

- Transportation and mobility
- Housing, employment, and livability
- Environmental-related concerns and behaviors
- Public safety and infrastructure
- Recreation and well-being
- Other key topics

The survey will also collect demographic and psychographic information about respondents.

Our Team will purchase a domain name and code the survey structure, periodically compiling survey results for review. Upon completion of the designated survey length, all data will be downloaded for analysis. This will include easy-to-understand graphics, such as pie charts and bar graphs.

The project team will apply appropriate quantitative techniques, such as tabulations to analyze the survey information. Survey results will inform other project tasks including the trends analysis, gaps analysis, and goal setting.

Website and Media Creation

The WM Team will develop a project website utilizing the County's existing platform for easy navigation and recognition. The website will communicate important information about the project, make draft documents available for public review and comment, and will collect input through surveys and other feedback tools. If desired, a project Facebook page and Twitter account can be established as part of this task.

Working with the County's project staff, the WM Team will brainstorm possible domain names and then purchase a mutually agreed upon domain name for the Plan Update 2020 website, which will be hosted on the consultant's server.

After meeting to discuss the direction and look of the site, our Team will create two template options for the homepage and one subpage for the website. After incorporating client-provided revisions, site building and design will begin with provided text and images/photos. As we create project materials such as the community survey, meeting announcements, and the draft plan, they will be published to the website.

Public Information/Visioning Meetings

The WM Team will plan and facilitate a total of four public informational meetings to introduce the County Comprehensive Plan Update, including the three local Community Plans for Chester/Stevensville, Grasonville, and Kent Narrows.

As part of each of these meetings, the existing Queen Anne's County vision statement will be a highlight so that the WM Team can continue its evaluation and use the resulting vision statement developed under Task 2.4 to serve as the focal point for goals, policies, and strategy decisions.

For each of the meetings, our Team will provide the following outreach services:

- Set up, support, and attendance
- Directional signage
- Meeting handout
- Design, layout, and printing of informational boards and maps
- Translation services (Spanish and American Sign Language), *if requested*
- Compile comments received at the meeting
- Add to and retain the database of attendees, maintaining mailing and email list for future notices
- Produce report detailing workshop and identified issues and priorities
- Design and coordination of print and online advertisements
- Design and coordination of a Facebook ad campaign
- Design and compilation of social media messaging and graphics for the County to encourage attendance
- Incorporate/facilitate an online component to the County-wide informational meeting in the form of a live feed
- Coordinate with the Citizen Alert Notification program to notify subscribers of upcoming meetings and encourage attendance
- Facilitate visioning activities

Stakeholder Interviews and Questionnaires

To gain additional knowledge of County stakeholders, the WM Team will distribute stakeholder questionnaires to key contacts developed in the stakeholder database. These questionnaires will ask some initial information of the stakeholder's organization and any events it may sponsor.

In addition to information obtained from the questionnaires, several stakeholder interviews may take place, which may include board and committee members; neighborhood associations; neighborhood groups; business owners; relevant state agency representatives; home builders; developers; realtors; and similar groups. These interviews may occur as either in-person roundtable interviews, phone interviews, or through a brief, coordinated written survey.

Beyond these stakeholders, the team anticipates involving the business community through the Chamber of Commerce, the Kent Narrows Development Foundation, and the County Economic Development Commission, in addition to watershed organizations and affiliated local agencies such as Community Services; Tourism; Emergency Services; Parks and Recreation; Public Works, Roads; Trash and Recycling; Water and Sewer; Environmental Health; and Soil Conservation District.

Highlighting this information in the Plan can serve as an economic development tool by distinguishing some organizations in the County from others in the area. The information can also be used by participating organizations if they seek grant funding, since it can show a pre-existing relationship with the County.

ADD ON ITEM: Plan Informational Video

If desired, the WM Team can write and produce a three-minute video explaining the purpose of the Plan update, emphasizing the need for input from stakeholders in developing the update. The video can be posted to the Plan website in advance of the public informational meetings and can be advertised across Queen Anne's County social media accounts. The video can serve as a resource for people who are unable to attend the meetings in person. This is not included as part of the scope of work and cost can be discussed as part of the overall approval, should the task be awarded and budget available.

Task 2.3: Evaluate Existing County Vision Statement

The WM Team will meet with the Planning Commission to present preliminary summaries of the kick-off workshop and stakeholder meetings and to create vision statements and planning principles based on background research, observations, and input. The vision statements and planning principles will serve as a framework for the development of the Plan update.

Task 2.4: Issues and Opportunities Assessment

The issues and opportunities identified under Task 2.1 will be assessed through a public participation process to help the team formulate community goals and objectives that represent the

collective desires of the public, which may include the incorporated municipalities within the County as well as various State and regional agencies. We will accomplish this task through the public information/visioning meetings, community survey, stakeholder questionnaires and interviews, and project website.

Task 2 Deliverables

- Detailed Public Engagement Plan
- Meeting Agendas and Content
- Monthly Briefing for County Commissioners
- Project Website and Outreach Media
- Existing Conditions Analyses and Maps
- Public Engagement Collateral
- Community Survey and Results
- Stakeholder Interview/Meetings Summary
- Draft Vision Statement and Planning Principles

Duration: 4 months

Stakeholders / Review Agencies: County, Planning Commission

Task 3 – Community Assessments & Demographics

This step will entail preparing preliminary jurisdiction profiles and community plans. The community plans will provide more specific recommendations for three areas of the County that have been previously studied: Chester/Stevensville, Grasonville, and Kent Narrows.

When possible and where pertinent, the WM Team will coordinate with the County Board of Education and other applicable County and State agencies to obtain relevant information to include in the community assessments. We will also incorporate and review other pertinent plans into these assessments and profiles, such as those mentioned under Task 2.1.

While the eight incorporated jurisdiction profiles will be brief summaries as those communities prepare their own comprehensive plans, the three community profiles/plans will be shortened versions of the County comprehensive plan – incorporating pertinent components.

Task 3.1: Incorporated Jurisdiction Profiles

The WM Team will develop brief community profiles for each of the eight incorporated jurisdictions within the County. These individual profiles will include information on the jurisdiction's demographics, qualities, geography, and trends:

- Demographic and socio-economic profile (existing and projected)
- Evaluation of housing stock, including affordability
- Profile of employment base
- Profile of non-residential development
- Public health considerations

This profile will build on information developed during Task 2, reflecting current and projected demographic and socioeconomic trends and their implications on land use patterns and public services planning.

Task 3.2: Community Profiles

The WM Team will develop three draft subarea plans for the communities of Chester/Stevensville, Grasonville, and Kent Narrows, that will provide more specific recommendations for these areas than a County Comprehensive Plan would otherwise allow. These subarea plans will be adopted and incorporated as part of the 2020 Queen Anne's County Comprehensive Plan update process.

One item to discuss during the project kick-off meeting is whether it is the County's intent to have separate citizen task force groups for each of the three community plans, separate from the County Planning Commission. If that is the case, it is recommended that each task force meet two to four times to discuss the Plan and its update.

We recommend that the plans retain a similar content structure; however, these plans should appear in an updated layout and style that is more consistent with what is proposed for the 2020 County Plan:

- Purpose, Background, and Process
- Community Profile
- Planning Issues
- Planning Recommendations

Please note that the community visioning meetings are discussed under Task 2.2.

Task 3 Deliverables:

- Draft Jurisdiction Profiles (8)
- Draft Community Plans (3)

Duration: 5 months

Stakeholders / Review Agencies: County, Planning Commission, Incorporated Jurisdictions, Community Task Force Groups

Task 4 – Plan Development

Task 4.1: Comprehensive Plan Framework

Based on the outcomes of Tasks 2 and 3 and the public feedback to date, the WM Team will develop a framework for the comprehensive plan's organizational structure. The framework will be vetted by Staff and Planning Commission members before we develop significant content. This content may include preliminary high-level goals and action items that have been informed by the public process.

Task 4.2: Meeting with Staff and the Planning Commission

The Team will meet with Staff and the Planning Commission to review draft plan materials and seek guidance on final drafting objectives.

Task 4.3: Development of Draft Comprehensive Plan

The WM Team will draft all elements of the comprehensive plan following the agreed upon framework, with the exception of the

implementation strategy. We will use the analyses from Task 2 to develop the elements and couple them with goals, objectives, and policies. We will develop these goals, objectives, and policies through the overall input policies outlined previously, with the broader community, as well as through interactions and arrival at consensus with the Planning Commission, elected leaders, and County staff.

Anticipated comprehensive plan elements (in no particular order) include the following, but may be amended as determined by the process:

- Affordable/Workforce Housing Element
- Community Facilities Element
- County/Town Planning Element
- Economic Development and Tourism Element
- Historic and Cultural Preservation Element
- Land Use Element
- Priority Preservation Areas Element
- Sensitive Areas and Natural Resources Element
- Transportation Element
- Implementation Element

The Planning and Zoning Staff and Planning Commission members will review and edit the draft plan as part of this task. They will review the chapter/sections for ease of presentation and public comment. Based on the project budget, we anticipate two draft review cycles.

Task 4.4: Draft Implementation Element

While the overall comprehensive plan document will outline the key components of the plan's recommendations in terms of land use, transportation, parks, and other elements, this section will outline the prioritization and methods that the County may use to bring the goals, strategies, and direction of the overall Comprehensive Plan to life. This will include a roadmap for how to move each Plan element forward. The Plan will outline the following elements:

- Data requirements that will be necessary to make decisions between different plan objectives or to move forward in general (across different topics)
- Steps necessary to make reality the various goals and objectives, and the vision for the community
- Timing and phasing (in terms of short-, medium-, and long-term) of various elements of the Comprehensive Plan and the strategies used to implement Plan components
- Creation of a set of evaluation criteria to evaluate the progress of the Comprehensive Plan

A critical piece of the Implementation Plan will entail evaluating the existing Queen Anne's County land use regulations and their appropriateness when compared to the vision described in the new Comprehensive Plan. We will analyze the existing regulations and provide a summary of revisions that may be addressed to support the objectives that have been determined by the public and Team for the future of Queen Anne's County.

Task 4.5: Draft Plan Presentation

Following the completion of a formal draft of the Comprehensive Plan document, we will conduct a formal study session with the Planning Commission and Board of County Commissioners to review the document and obtain direct input from these bodies concerning the recommendations in the plan. In addition, the WM Team will conduct a formal review of the document with County staff to assess the document for completeness and to review all the recommendations outlined in the Plan.

If requested, the WM Team can also circulate the draft Plan to State agencies, incorporated jurisdictions, and neighboring counties/municipalities for their review.

Task 4 Deliverables:

- Draft Comprehensive Plan and two revisions
- Draft Implementation Element
- Final Draft Comprehensive Plan
- Public Engagement Collateral

Duration: 6 months

Stakeholders / Review Agencies: County, Planning Commission, State Agencies

Task 5 – Adoption of the Comprehensive Plan

Task 5.1: Comprehensive Plan Collateral

To ease public hearing and adoption process, the WM Team will prepare a number of summaries, in brochure and/or poster format, that condenses the findings, goals, and objectives of the Plan, which will be provided to County staff in advance of all public meetings or hearings. This information will also be made available in electronic format for posting to the project website.

Task 5.2: Planning Commission Public Hearing

Members of the WM Team will attend a Planning Commission meeting to support County staff and present the final draft comprehensive plan during a public hearing. Once we know the outcome of this hearing, we may edit the draft document.

Task 5.3: Board of County Commissioners Public Hearing

Members of the WM Team will attend a Board of County Commissioners meeting to support County Staff and present the final draft comprehensive plan during a public hearing. Once we know the outcome of this hearing, we may edit the draft document.

Task 5.4: Final Comprehensive Plan Document

Following adoption hearings, the WM Team will provide a final copy of the adopted comprehensive plan in a digital file that is

compatible with the systems and programs utilized by the County. The final electronic version of the Plan will be internet-ready. All graphics and materials used in the Plan, as well as the content of all deliverables, will be the property of Queen Anne's County.

Task 5 Deliverables

- Comprehensive Plan Collateral
- Final Queen Anne's County Comprehensive Plan (1 unbound hardcopy and PDF)
- Final Community Plans (3) (one unbound hardcopy and PDF)
- Public Engagement Collateral for Public Hearing Presentations
- All associated content provided in native file formats, including GIS data and maps as well as all graphics and illustrations

Duration: 3 months

Stakeholders / Review Agencies: County, Planning Commission, Board of County Commissioners

Task 6 – Project Management

This task, which will extend throughout the length of the project, will incorporate the management of the project, including organizing the various staff members on the consultant team. It will include administrative and record keeping tasks such as the preparation of progress reports, documenting travel and expense receipts, and submitting invoices.

We propose a regular communication strategy to maximize the value of everyone's time. While the project Team will meet more formally at certain times, monthly project meetings with the County will help the Team address issues as they arise. In addition, we will communicate with the client team on a regular basis via phone calls and emails.

Task 6 Deliverables

- Monthly invoices, along with project progress reports, submitted to the County
- Detailed project schedule
- Agendas and minutes for each meeting, circulated to team members

BUDGET AND SCHEDULE

Our proposed project fee and schedule are explained in further detail in sections 5 and 6 of this proposal, respectively

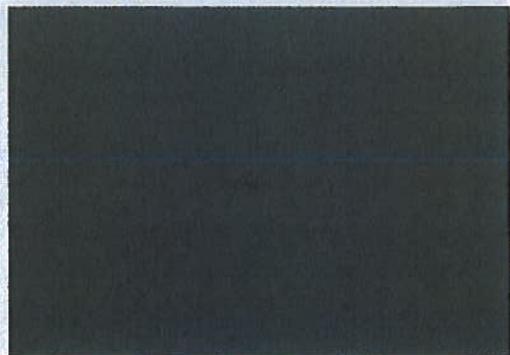
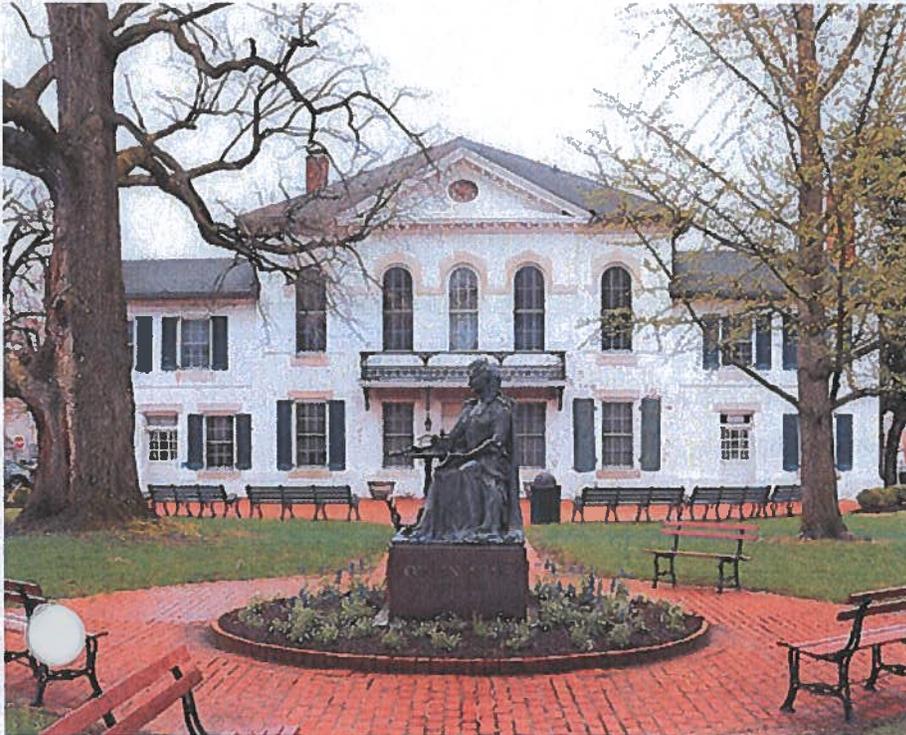


Section 5

Proposed Fee



WALLACE MONTGOMERY



The scope of services described in this proposal represents a comprehensive and recommended approach to complete the Queen Anne's County Comprehensive Plan Update. The **Wallace Montgomery (WM)** Team understands the level of investment is significant and appreciate the commitment you are making to a process and document that will serve your community for the next 10 years. We will work with you to refine the scope and associated fee if necessary and to identify opportunities for County and volunteer support to bring additional value to the process. While we are confident each of the tasks described are necessary and worthwhile, there may be opportunities to modify them to meet your budget expectations.

We acknowledge complete understanding of the bid terms, conditions, and requirements and our proposed pricing includes all services and reimbursable charges, except where specifically stated.

PROJECT FEE

Project Fee by Task

Task 1	Development of Detailed Scope of Work	\$ 2,520.00
Task 2	Project Initiation, Conditions, Participation and Issues	\$ 110,527.66
Task 3	Community Assessments and Demographics	\$ 73,359.72
Task 4	Plan Development	\$37,518.56
Task 5	Adoption of the Comprehensive Plan	\$21,320.00
Task 6	Project Management	\$13,730.00
TOTAL	Overall Project Fee	\$258,975.94

Proposed not-to-exceed cost for all work, including all estimated reimbursable expenses, is **\$258,975.94**

Hourly Rates

Classifications	Fully Burdened Hourly Rates
Project Manager	\$ 165.00
Senior Planner / Engineer	\$ 145.00
Junior Planner / Engineer	\$ 100.00
GIS Technician	\$ 90.00
Environmental Analyst	\$ 100.00

Reimbursable Expense Schedule

Expenses include mileage expenses, printing and miscellaneous. **WM** expenses assume \$500 for mileage and \$500 for misc./printing.

Subconsultants

The following work will be provided by a project sub-consultant and the cost included in the overall project fee:

- **Heritage Strategies, LLC** - Historic & Cultural Resource Analysis
- **Remline** - Public Outreach

Proposed Labor Resources

The following is an estimate of the WM labor resources needed by Task, broken down by hours for each labor category assigned to the project. Anticipated start and finish dates for each task is included in Section 6, "Proposed Fee".

HOURS ESTIMATE								
		Associate	Project Manager	Sr. Engineer Planner	Jr. Engineer Planner	GIS Tech	Environ. Analyst	TOTAL
Task 1	Development of a Detailed Scope of Work							
1.1	Coordination Kick-off Meeting	0	3	3	3	0	0	9
1.2	Finalize Detailed Scope	0	4	4	0	0	0	8
Task 2	Project Initiation, Conditions, Participation and Issues							
2.1	Initiate Project and Analyze Existing Conditions	0	16	24	40	0	16	96
2.2	Develop Base Resource Mapping and Evaluate Existing Conditions	0	16	80	80	40	24	240
2.3	Evaluate Existing County Vision Statement	0	4	20	8	0	8	40
2.4	Issues and Opportunities Assessment	0	8	28	24	24	8	92
Task 3	Community Assessments and Demographics							
3.1	Incorporated Jurisdiction Profiles	0	16	24	0	16	4	60
3.2	Community Profiles	0	40	104	120	80	0	344
Task 4	Plan Development							
4.1	Comprehensive Plan Framework	0	8	16	8	0	0	32
4.2	Meeting with Staff and Planning Commission	0	3	3	3	0	0	9
4.3	Development of Draft Comprehensive Plan	0	16	40	40	24	8	128
4.4	Draft Implementation Elements	0	8	16	16	0	0	40
4.5	Draft Plan Presentation	0	8	8	8	0	0	24
Task 5	Adoption of the Comprehensive Plan							
5.1	Comprehensive Plan Collateral	0	8	24	24	16	8	80
5.2	Planning Commission Public Hearing	0	6	6	6	0	0	18
5.3	Board of County Commissioners Public Hearing	0	3	3	6	0	0	12
5.4	Final Comprehensive Plan Document	0	8	24	16	16	0	64
Task 6	Project Management							
6.1	Monthly Project Meetings	0	24	24	12	0	12	72
6.2	Detailed Project Schedule	0	8	16	0	0	0	24
TOTAL HOURS		0	207	467	414	216	88	1392

Discretionary Tasks

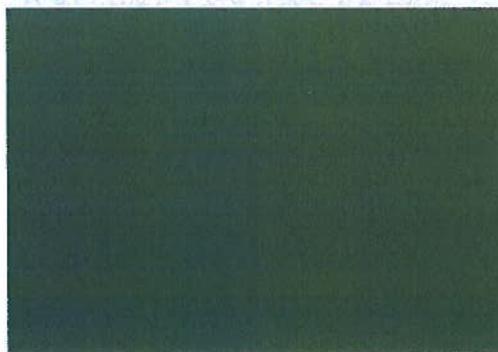
As part of the Project Services Section, we identified an additional task for the County's consideration. This task would be to provide a Plan Information Video. Should this service be requested the estimated fee would be an additional \$7,000.00. This fee covers both WM project management QA as well as the task to be completed by **Remline**.

This information has been included as discretionary at this preliminary stage so that the County may make an informed decision to add and/or delete selected work from the scope of services.



Section 6

Proposed Schedule



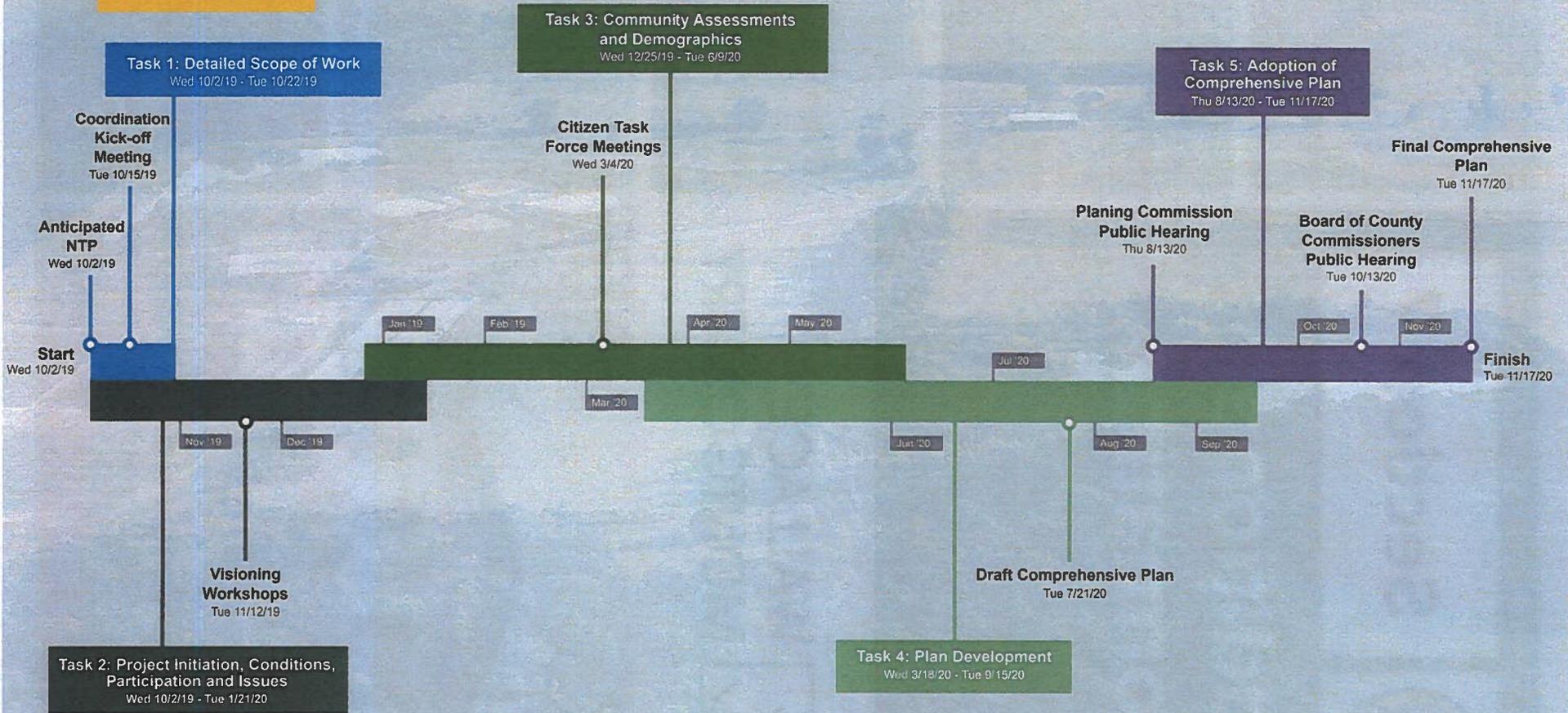
Section 6
Proposed Schedule



Comprehensive Plan Update 2020



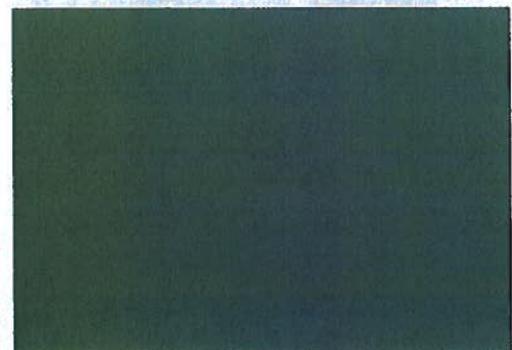
All Dates are Tentative



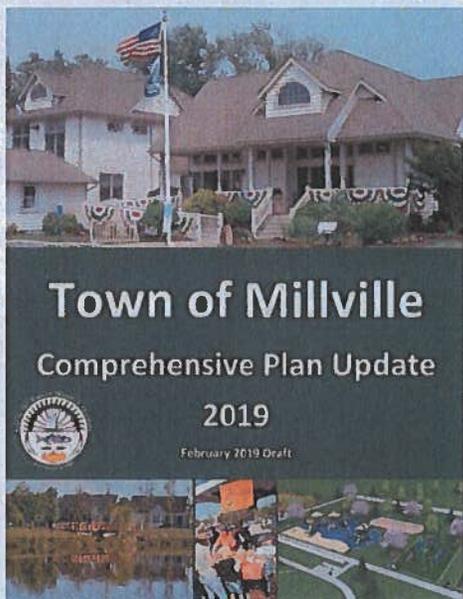


Section 7

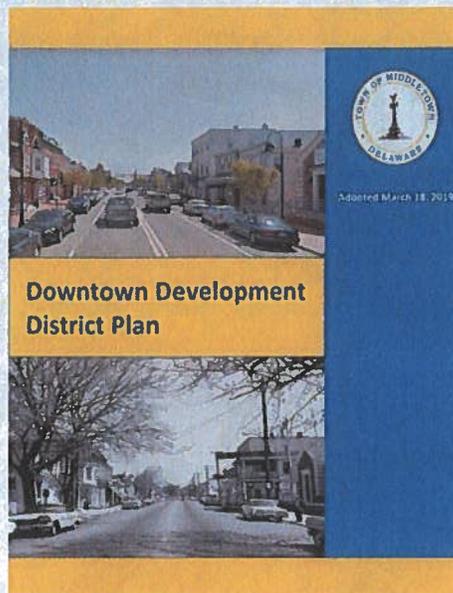
Additional Information



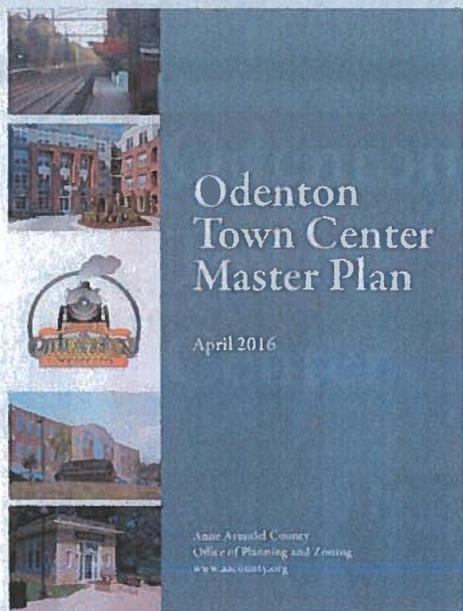
Our Team's Comprehensive Plan Projects



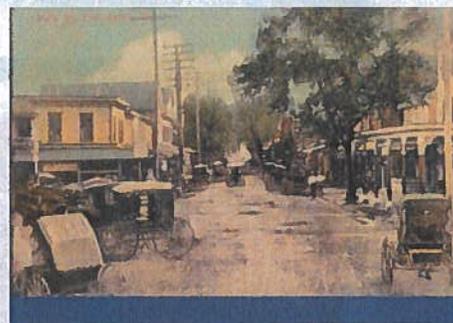
Town of Millville, 2019



Town of Middletown, 2019



Odenton Town Center, 2016



City of Harrington
Downtown Development District Plan
Adopted - May 9, 2016

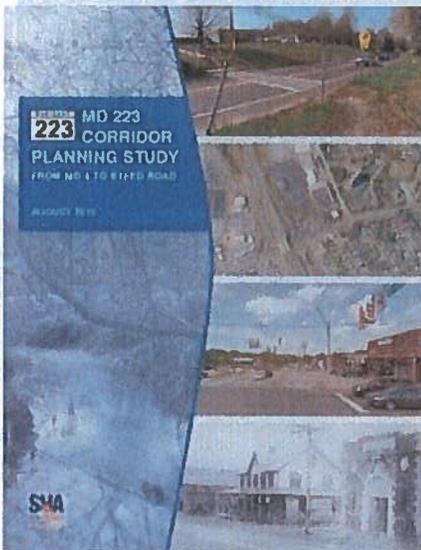


City of Harrington, 2016

Kathryn Mays – Graphic Designer Portfolio Sample

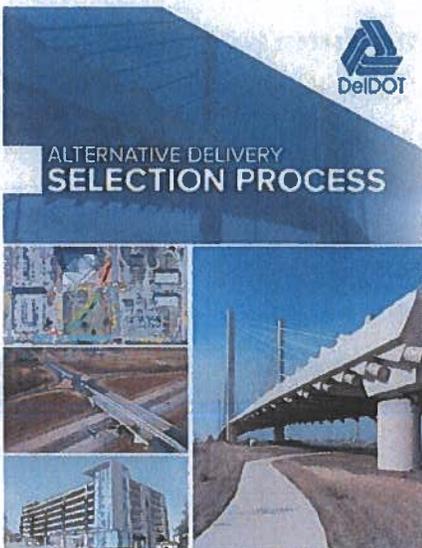
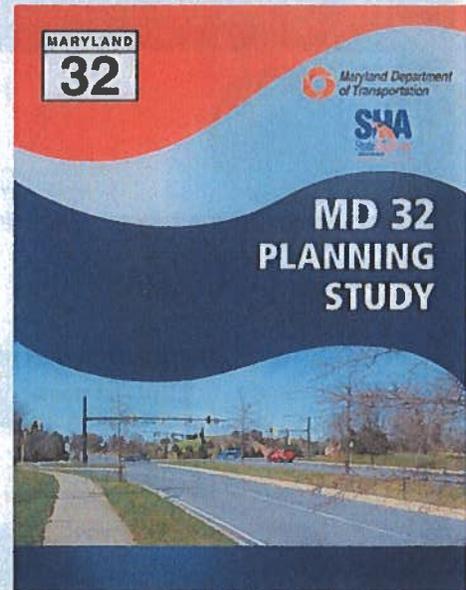


Our Team's Plan & Manual Document Experience



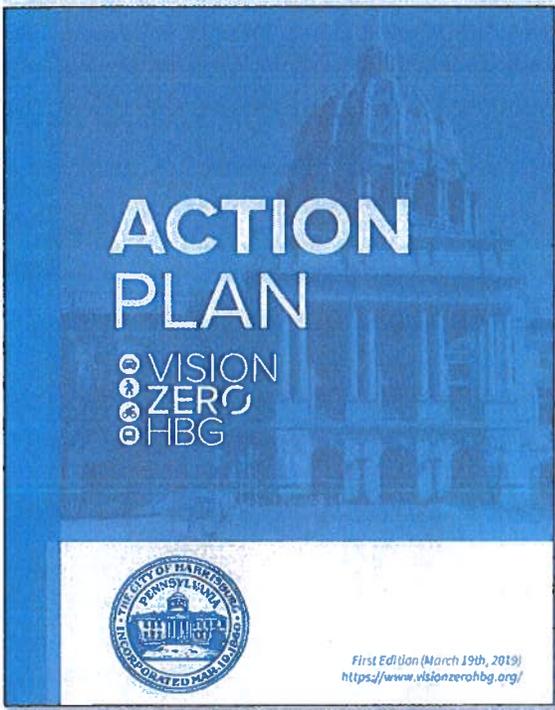
Wallace Montgomery conducted a study to identify transportation improvement needs as part of a corridor planning study consistent with FHWA PEL guidance. **WM** identified short-, mid-, and long-term solutions and delivered a study document to guide the next phases of project development.

Wallace Montgomery conducted a study that developed measures of effectiveness to address the short- and mid-term needs of the MD 32 corridor and identified long-term studies to address future needs. **WM** delivered findings in a formal document; developed and presented materials and display boards at Public Workshops; conducted an on-line survey; created a newsletter; and conducted stakeholder interviews.



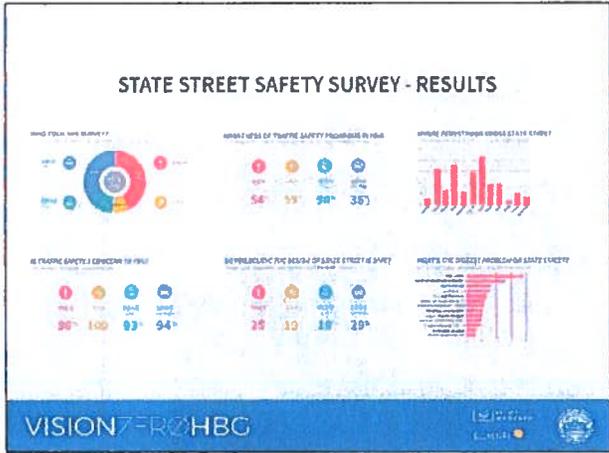
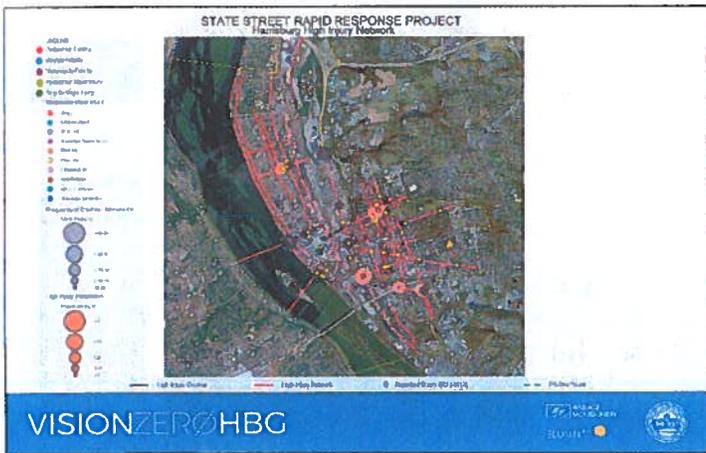
Wallace Montgomery has prepared a Design-Build Delivery Manual for the Delaware Department of Transportation (DelDOT). This manual is used by DelDOT staff to assess and choose from various delivery methods for project letting.

Vision Zero – an Action Plan for the City of Harrisburg



The following pages showcase an excerpt of the Vision Zero Action Plan – a Comprehensive Traffic Engineering Plan for the City of Harrisburg that **Wallace Montgomery** provided to the City.

Vision Zero Public Outreach

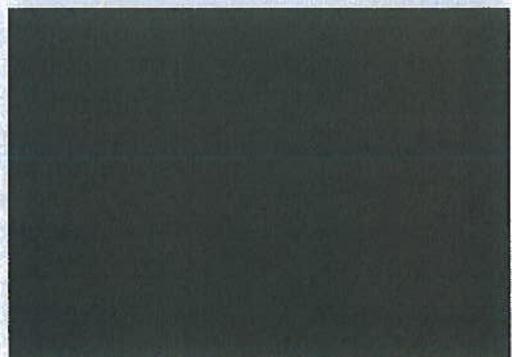
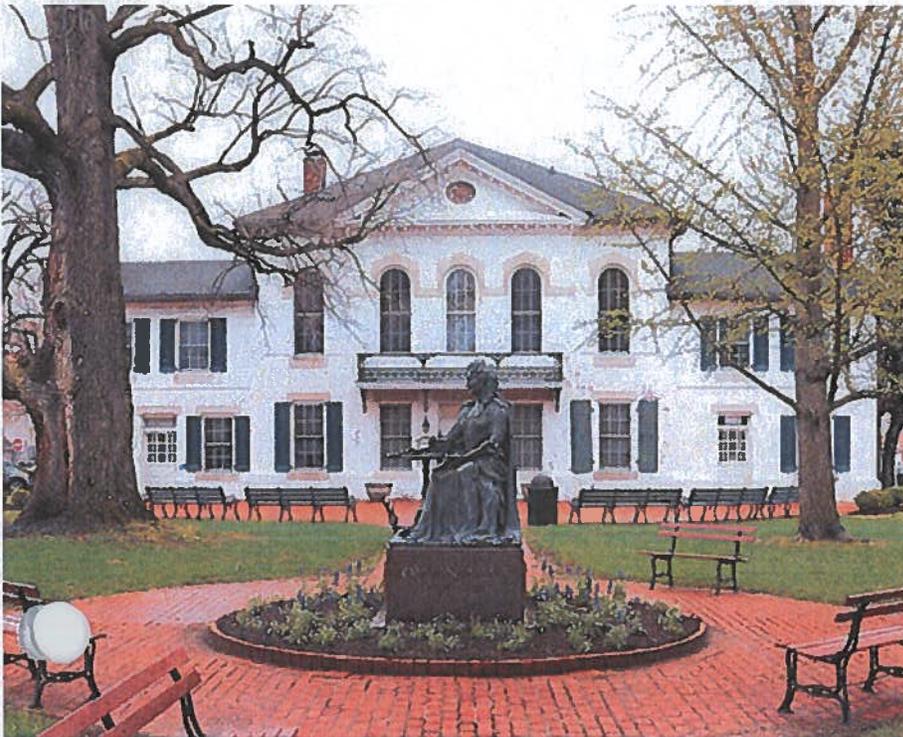




Section 8

Contract and Insurance

WM WALLACE
MONTGOMERY

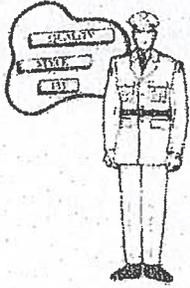




Contract and Insurance

Comprehensive Plan Update 2020 | Queen Anne's County, Maryland

Wallace Montgomery (WM) will be able to provide proof of insurance to protect Queen Anne's County against errors and omissions if we are selected for this contract. We have Professional Liability Insurance coverage in the amount of Five Million Dollars (\$5,000,000). We also maintain Comprehensive General Liability, Comprehensive Automobile Liability, and Worker's Compensation Insurance.



HOWARD UNIFORM COMPANY

1915 Annapolis Rd. • Baltimore, MD 21230
(410) 727-3086 • FAX (410) 727-3142

April 15, 2020

Blair Schiro

Queen Anne's County Detention Center

500 Little Hut Rd

Centreville, MD 21617

Blair,

Howard Uniform has submitted a bid for the 2020 Queen Anne's Co. Detention Center. In our bid response we carefully consider all bid specifications for our pricing on all items.

The bid states in bold letters on the 13th line that the bid will not be split. Our pricing is based on receiving the award of all items.

The bid states in bold all caps on the 4th line that all patches will be supplied by the bidder. Our pricing is based on our being able to procure the patches with bulk pricing for all the items on the bid.

The bid states on the 10th line that the successful bidder shall provide someone to size the employees for fit. This requires our representative to be available to the detention center for all three shifts on an agreed upon day and allow them to try on the items they will order. Our pricing is based on the time required for our representative to fit the employees.

Due to these factors we need our bid response to be considered as a whole and not be split, as is clearly stated in your bid specifications.

Thank you,

Jeff Caples

General Manager

Howard Uniform Company

MANUFACTURERS OF DISTINCTIVE UNIFORMS

ACTION ITEM

To: Queen Anne's County Commissioners

From: Warden LaMonte E. Cooke *LMC*

Action

Re: Uniform Bid

Date: March 24, 2020

The Queen Anne's County Department of Corrections has solicited bids for the replacement of correctional officers' uniforms and related equipment.

We sent requests for bid proposals to four known vendors. Two companies responded and they were Howard Uniform Co. and Lawmen Supply Co. This expenditure is budgeted in our FY20 operating budget.

I move the bid be awarded to Howard Uniforms for correctional officers' uniforms.



BID LIST

Graves Uniforms

102 Savannah Road

Lewes, DE 19958

Alex Sgambato

American Public Safety

31507 Oak Orchard Rd.

Unit 10

Millsboro, DE 19966



Jay Weston

Lawmen Supply Co.

1484 E. Lebanon Rd.

Dover, DE 19901

Jeff Caples

Howard Uniform Co.

1915 Annapolis Road

Baltimore, MD 21230

BID TABULATION

Queen Anne's County Detention Center

Uniform Bid

March 24, 2020

BIDDER:

Howard Uniforms

Pants	45.50
Short Sleeve Polo	41.00
Long Sleeve Polo	44.00
Sweaters	66.50
Coats	121.00
Jackets	46.50
Nylon Duty Belt with Accessories	48.50

RECOMMEND AWARD TO: HOWARD UNIFORMS

AWARDED TO: _____

DATE AWARDED: _____

BID TABULATION

Queen Anne's County Detention Center

Uniform Bid

March 24, 2020

BIDDER:

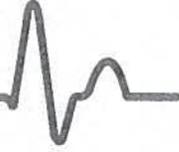
Lawmen Supply Co.

Pants	38.08
Short Sleeve Polo	27.00
Long Sleeve Polo	29.00
Sweaters	72.95
Coats	300.67
Jackets	150.53
Nylon Duty Belt with Accessories	89.40



Queen Anne's County Department of Emergency Services
EMS ♦ Communications ♦ Emergency Management ♦ Fire Marshal

100 Communications Drive ♦ Centreville, Maryland 21617
Phone 410.758.4500 ♦ Fax 410.758.2086



Action Item

Date: May 4, 2020
To: Board of County Commissioners
From: Scott A. Haas, Director *SAH*
Cc: Todd Mohn, Administrator
Re: Sole-Source Procurement from Carousel/Airbus

The Department of Emergency Services has been awarded grant funding from the Emergency Number Systems Board (ENSB), Project #20-200 for \$1,657,053.33. The purpose of this grant is to install a new VESTA 9-1-1 telephone system to include all new hardware and software. This update is necessary as the agency prepares for Next Generation 9-1-1 implementation. Enhancements as part of this grant include:

- VESTA 7.1 Software update, SMS deployment ready
- VESTA NG 9-1-1 Nena i3 Mapping solution
- VESTA 9-1-1 Heads-Up Display
- VESTA Analytics 3.1
- ECaTS MIS Realtime 9-1-1 Analytics
- Five VESTA Call-taking positions installed at Kent County, Maryland back-up PSAP

The grant will also fund the on-site installation and all administrative training necessary for system implementation. Once the installation is complete, the software and preventative maintenance obligation of the system is part of the grant award for five years at no additional cost to the County.

Due to already existing hardware, maintenance, and system monitoring agreements for the current VESTA 9-1-1 phone system, the Department of Emergency Services is requesting sole source procurement from Carousel, to maintain continuity in the expansion of the system.

Recommended Motion: I move to approve a Sole Source Procurement and authorize the Director of the Department of Emergency Services to execute a contract with Carousel Industries to provide a VESTA 9-1-1 phone system totaling for \$1,657,053.33.



**Queen
Anne's
County**

**THE DEPARTMENT OF PARKS & RECREATION
OF QUEEN ANNE'S COUNTY**

1945 4H Park Rd.
Centreville, MD 21617
www.qac.org/229/parks-recreation
Telephone: (410) 758-0835
Fax: (410) 758-0566

County Commissioners:

James J. Moran, At Large
Jack N. Wilson, Jr., District 1
Stephen Wilson, District 2
Philip L. Dumenil, District 3
Christopher M. Corchiarino, District 4

County Administrator: Todd Mohn

Executive Assistant to County Commissioners: Margie A. Houck

County Attorney: Patrick Thompson, Esquire

MEMORANDUM

Date: May 12, 2020

To: County Commissioners

ACTION ITEM

From: Stephen Chandlee, Director, Department of Parks and Recreation
Joan Brooks, Recreation Manager

Subject: Fireworks Event

The Department of Parks and Recreation has contracted the Fireworks Celebration at the Exploration Center at Kent Narrows with Zambelli Inc. for the date of Wednesday, July 1, 2020 and the rain date of Thursday, July 2 2020.

In December, we paid half of the fees (\$10,000) to lock in the date for the event. We have been contacted by the vendor regarding the decision to cancel the event and select another date due to the current situation with the COVID 19 virus.

Based on conversation with the Zambelli's Project Manager, Kim Ceyrolles, we have two options to consider:

1. Cancel and move the event to next year July 2021 with no price increase
2. Postpone and select another date this year 2020 with no price increase

Requested Action:

I move to authorize the Department of Parks and Recreation to cancel the fireworks contract with Zambelli, Inc. for the July 2020 Fireworks Celebration that was to be held on Wednesday July 1, 2020, due to the COVID 19 virus and select the same dates next year based on availability of the vendor.

cc: Jon Seeman



To: Zambelli Fireworks 2020 customers
From: Zambelli management
Date: March 16, 2020
Subject: Zambelli Policy Regarding Coronavirus Related Cancellations/Postponements

We want to address concerns broached by several customers about the stance Zambelli Fireworks will take in the event that the health risks associated with the Coronavirus cause cancellation of a contracted fireworks display. First, Zambelli Fireworks appreciates its relationships it has with its customers, many of whom have been long standing clients. As such, and in recognition of the difficulties we are all experiencing in this crisis, we have instructed all of our Project Managers to work in a congenial manner to solve problems you are likely to experience. However, we also ask each of you to recognize the difficulties we are facing and stress that early and frequent communication is necessary to minimize dislocations on both our parts.

Each of you sign a contract with us requiring a deposit and additional payments based on the timing of cancellation. We are going to amend the terms on cancellation in recognition of the extraordinary circumstances we all face. Allow me to enumerate the new terms as well as explain some constraints we face in certain scenarios.

Cancellation of displays outside of June 29 through July 12

Cancellation prior to 30 days of a scheduled display will not be financially penalized.

Cancellation of June 29 through July 12 2020 displays

Cancellation of a June 29 through July 12, 2020 displays prior to 45 days ahead of time will not be penalized with two caveats. In order to prepare for this busy time of year, we are required by Budget Rental Truck to receive trucks at our location by June 1. In order to arrange for delivery, Budget requires a contractual obligation on our part by mid-April. We will ask customers cancelling after April 15 to consider helping reimburse Zambelli for truck rental expenses. Given the uncertainty this year, we are working with Budget to give us more leeway in our truck order. We will communicate the results of those discussions as soon as we have clarity of Budget's revised policy. In addition, shows utilizing barge services require us to reserve a barge various numbers of days from the display. These arrangements typically occur between our Project Managers and a local barge company. We will require reimbursement for those expenses from customers who do not provide us timely notification as agreed between the customer and the Project Manager.

Boca Raton, FL
Raleigh, NC

Shafter, CA
Myrtle Beach, SC

120 Marshall Drive
Warrendale, PA 15086
1-800-245-0397

Walkersville, MD
Denver, CO

Cincinnati, OH

Postponement of any 2020 display

Zambelli Fireworks encourages our customers to utilize postponement dates for displays. All deposits will be credited towards the postponement date as long as Zambelli is notified before its crews are mobilized or other expenses directly attributed to your display are incurred. This can typically be accommodated within 45 days from the scheduled date. Despite increases in product costs which have occurred due to a variety of factors, Zambelli Fireworks will hold to our contractual pricing in the case of a display postponed within calendar year 2020.

Cancellation within 30 days of a display

Finally, cancellation within 30 days from the date of the display without utilizing a postponement date will revert to the terms of the contract.

We believe these changes are a fair accommodation in the difficult environment we are currently experiencing. We encourage you to work with your Project Manager to reach accommodations that give your customers an enjoyable, safe experience that Zambelli and you love to provide.

You have received an email from Zambelli Fireworks explaining our policy on cancellations and postponements due to the coronavirus. There was an error in that original email. Please note the Highlighted area in the paragraph below. The appropriate date is May 15th, not April 15th as previously Stated.

Cancellation of June 29 through July 12 2020 displays

Cancellation of a June 29 through July 12, 2020 displays prior to 45 days ahead of time will not be penalized with two caveats. In order to prepare for this busy time of year, we are required by Budget Rental Truck to receive trucks at our location by June 1. In order to arrange for delivery, Budget requires a contractual obligation on our part by mid-April. We will ask customers cancelling after May 15 to consider helping reimburse Zambelli for truck rental expenses. Given the uncertainty this year, we are working with Budget to give us more leeway in our truck order. We will communicate the results of those discussions as soon as we have clarity of Budget's revised policy. In addition, shows utilizing barge services require us to reserve a barge various numbers of days from the display. These arrangements typically occur between our Project Managers and a local barge company. We will require reimbursement for those expenses from customers who do not provide us timely notification as agreed between the customer and the Project Manager.

CC-32

Date 4/17/2020

QUEEN ANNE'S COUNTY
REQUEST FOR BUDGET AMENDMENT
FY 2020

Description of expenditure/revenue accounts to increase/(decrease):			Fund	Activity	Account Code Account	Project	Increase (Decrease) Amount
Increase	Aging - IIC-2 Home Delivered Meals	Federal Grant	618	618050	32490		26,197
Increase	Aging - IIC-1 Congregate Meals	Federal Grant	616	616050	32490		5,240
Net Increase in revenue							31,437
Increase	Aging - IIC-2 Home Delivered Meals	Food Services	618	618050	5456		26,197
Increase	Aging - IIC-1 Congregate Meals	Food Services	616	616050	5456		5,240
Net Increase in expenditures							31,437

Justification: Department of Aging received Families First Coronavirus Response Act Notice of Grant Award on April 6, 2020. \$5,240 is for Congregate Meals expenditures and \$26,197 is for Home-Delivered Meals Expenditures. The total grant award to be spent before September 30, 2021 is \$31,437.

No additional County Funds Needed

RM
4/24/20

Requester printed Department: Catherine R. Willis, LMSW, Director, Dept of Comm Services

Requester signature & date: [Signature] 4/27/20

Finance Director signature & date: [Signature]

Approval & date: _____