

COMPREHENSIVE PLAN COMMITTEE
Thursday, March 21, 2002

MINUTES

ATTENDANCE: Jim Stephenson, Harold Burnham, Charlie Turner, Dana Desjardins, Jean Carter, Don Willard, Town Manager, and Elizabeth Algeo (at 7:30)

The following is a rough transcript of interviews of Mr. Rich Rothe and Mr. Mark Eyerman. Questions, **in bold**, appear in full on the 'Sample Interview Questions' sheet and were presented by Mr. Stephenson. Candidate's responses follow each question:

Interview of Rich Rothe; 7:30 to 8:15 P.M.

I missed Mr. Rothe's 5 minute introduction. Others may have recorded his statements?

Question 1: Direct support with Comprehensive Plan services:

Mr. Rothe would attempt to get Committee group dynamics flowing. He would take responsibility for technical work and mapping. He would provide materials and agenda suggestions to the committee before meetings. He'd challenge the Committee to consider multiple options on many questions, rather than to direct the Committee to single solutions. Mr. Rothe has worked on a range of Comprehensive plan types and works well with committees and with the public. He produces high quality work, is skilled at writing, mapping, public speaking, and public forum leadership. He is a credible resource of information needed for comprehensive planning.

Rothe has worked with the State Planning Office (SPO) and can work as a team with other planning professionals, should the committee prefer to parcel out work.

Question 3: Most important elements of comprehensive planning process:

Most important is that the committee work as a team. The end product, the document, needs to be clear and needs to be 'owned' by each of the members of the committee. Rothe stressed that, when presenting the final plan to the Town, the Committee needs to be in agreement on the issues to give townspeople confidence that the committee and the Plan are credible. Another very important element of the Comprehensive planning process is raising the consciousness of the townspeople to the issues and future of the town.

Question 4: Formal Training and outline quals of other personnel:

Mr. Rothe has a BA in Zoology from _____, a Masters in Water Resources Management from _____. He has worked for the Regional Planning Commission the SPO, etc. (need to see CV for details on formal training and experience).

Mr. Rothe has worked with various contractors and other planning professionals. He is a sole proprietor, but has administrative assistance and backup at Maine Tomorrow, where his office is housed.

Question 5: Current Workload and Timely Support:

Mr. Rothe is currently finishing a comprehensive plan for the little town of Westport. This plan is mostly done. He is helping the Town of Bristol with their plan and will have a draft by the end of spring. He is filling in for a month, on a temporary basis, for a planner at the Kennebec Valley Council of Governments. Mr. Rothe is helping Gardner with its Land Use Ordinances. He meets with Gardner officials and feels he is about a third of the way through this project. Mr. Rothe feels he has the capacity to take on Raymond's project.

Question 6: Reasonable Agenda for Committee Meetings:

The committee needs an overall plan and must agree to stick to it. A time line must be established and Rothe would suggest a time frame for the committee to work within. Rothe would talk to the Committee Chair before each meeting regarding what needs to be done to meet goals of the meeting. The time line is critical and must be agreed upon. Time line can be adjusted, if needed, but the Committee needs to stay close to the schedule.

Question 7: Role in Focusing the Committee:

Mr. Rothe usually plays the role of facilitator, although the Chair should be in charge. In general, Rothe feels he always facilitates, makes things happen. Mr. Rothe warned that he cannot resolve all conflicts; some may not be resolvable. He tries to stay out of politics, but tries to guide committee towards accomplishments. Mr. Rothe would come to all meetings, feels he has to.

Question 8: Role in producing final Plan update:

Generally, Mr. Rothe produces the final document. Even if the local committee members produce or generate a lot of material, he still likes to put the final document together

Question 9: Key elements of Implementation Strategies:

Mr. Rothe feels that implementation strategies need to be realistic, achievable, and clear. Most importantly, strategies must be specific as to action that needs to occur to meet Policy or Goal.

Question 11: Reasonable budget for Town of our size?:

Mr. Rothe's costs are directly related to what he's asked to do. He's concerned that some of the elements proposed by Raymond in our SPO application could be expensive. For example, cost estimates for various scenarios could be very difficult to achieve. Mr. Rothe has done Plan updates for the smaller figure (\$24K), but the larger figure (\$32K) will give Raymond a more comprehensive study. Mailed surveys are very expensive and can drive up the cost of the project.

Question 12: Consulting Fee expense:

Mr. Rothe often works under a 'budget-not-to-exceed' arrangement. He suggested that having Committee members do some of the work can save costs, but will wear out the Committee and eat into scarce personal time. Mr. Rothe feels that Committee members should concern themselves with policy and leave the technical, time-consuming work to their consultant.

Mr. Stephenson: How much will it cost to have you attend meetings?

Mr. Rothe charges for 2 hours, plus mileage, for each meeting. **[I missed what Mr. Rothe**

quoted for his hourly rate] He does not make a lot of money on attending meetings, but feels they are critical.

Mr. Rothe passed around some example documents from the city of Auburn's recent Comprehensive Plan project. The first document, which was relatively thick and full of spreadsheets, consisted of all the analysis work. The second document, which was thinner, was the Plan. The Committee might consider producing several documents or booklets, which would allow for easier public consumption of the Plan. He suggested that a thick analysis document may dissuade the public from attempting to decipher and adopt the Plan.

Mrs. Algeo: How would you approach interaction with and survey of the public?

Two types of forums could be attempted. The first would be wide open: what do 'you' (the towns person) want to see in town in the future. The second would be a focused session asking: Do you like approach 'A' or approach 'B' to solve a particular problem. Mr. Rothe suggested that a 'Charrette' group, facilitated by Rothe and the Committee members, works well to extract solutions from the public.

Mrs. Carter: What place, if any, does the old plan have in the update process?

The second time around with Comp Planning is usually cheaper, because the first plan requires a great deal of work and data gathering that can be used in the second plan. The new plan would need new, updated goals, strategies, and policies to reflect changes in citizens' thinking and planning approaches.

Mr. Turner: How large is Mr. Rothe's organization?

Mr. Rothe is the sole proprietor. He works with other professionals often, including his competitors. He believes he could work quite well with GPCOG and others. He is flexible.

Mr. Burnham: How do you coordinate you work with other professionals?

Mr. Rothe works under any arrangement, such as partnership or subcontractor arrangements. Working with others is not a problem.

Mr. Burnham: What is a good sequence for Public Forums?

It's best to ask general questions of the public first and then, at a later forum, present various alternative approaches to planning problems and have the public give their opinions on these approaches. It's important not to call people together too frequently, in order not to risk losing interest.

Mr. Burnham: How would you propose going to the public?

Surveys, televised meetings, newspapers (including the Roadrunner) and neighborhood meetings are all good vehicles for reaching the public. The most satisfactory approach is to hold a public forum in a school-like format and ask the public to help the committee plan their town. Physical interaction with the public is much more valuable and efficient than are surveys, which are too focused on single, abridged responses.

Interview of Mr. Eyerman, Planning Decisions, 8:15 to 9:00 P.M.:

Mr. Eyerman's introduction:

Planning Decisions (PD) has a staff of 7, housed in 3 offices (South Portland, Hallowell, and ___?___). PD's work load is distributed in thirds; 1/3 is for municipalities, 1/3 is for State agencies and non-profits, and 1/3 is for private and semi-private entities. PD does some Comprehensive Planning, is successful with towns that want to think carefully about planning. The firm has some history with Raymond (they have worked on a Community Development Block Grant project) and the Lakes Region. Evaluation of Raymond's Comp Plan indicates that Raymond's is similar to those of most communities. The 1991 plan did not give the results that were hoped for. The key issues for Raymond are: 1. What kind of Community does the Town want to be in 10 years (in simple terms); and, 2. How does the town want to make this vision happen? Both issues are daunting. Raymond is an suburbanizing community. (Mr. Eyerman told of his conversation with a barber on 302 who used to know everyone in town. Now he watches people drive by and doesn't know most of them.) Raymond did a good job in the grant application of putting a finger on the issues. Planning Decisions proposes to help the Town determine the following: 1. What are the alternatives for how growth could occur; and, 2. Is there agreement that something other than the current growth pattern should occur? Some communities are successful at dealing with these issues.

Question 1: Experience Providing Comprehensive Plan support:

Over the last 20 years, staff at Planning Decisions has worked with 30 to 40 communities on Comprehensive Planning issues. These communities, including those that are current projects for PD, are listed in their proposal. PD wrote the state Comprehensive Plan Guidance Document.

Question 2: Technical expertise and strengths

Planning Decisions focuses on the Public Process. They work with many communities, committees, public forums. They have had a great deal to do with the State Planning Office's Visioning process. PD also focuses on the Planning Process. PD guides communities as they ask: 'what do we need to know to make decisions?' PD helps communities find good information and sort out information that is not as useful. Creative Solutions are a PD specialty. If Raymond wants to chart a new course, this will take creative thinking. How can this be done in a politically-acceptable manner. Do things the way Windham and Casco are NOT doing things. How do you manage the future of the community?

Question 3: Most Important Elements of the Planning process

One very important element is 'good homework'. Don't make mistakes. Your peers have to feel you are credible. Another very important element is the active public process. Listen to people, rather than go through the motions. Don't get caught up in SPO's 15 pages of instructions. Rather, figure out what's important to your community. Stay out of the little details.

Question 4: Personal Background and Training

The Planning Decisions proposal details background and training for the proposed project team.

PD has staff that can deal with a variety of issues. Iverson works with affordable housing. Erik H. would also work on this project and is skilled at public participation.

Question 5: Current Workload and Timely Support

Planning Decisions has lots to do, but can provide support to Raymond. Currently, PD has about 40 to 50 projects on their slate.

Question 6: Committee Meeting organization and meeting facilitation

What does Raymond want? Meetings are expensive, but the consultants' involvement is essential to a successful project. Typically, PD helps define the agenda, talks to the Chair, or even develops the agenda on their own. PD provides the materials necessary for the meetings and helps move the meetings along. PD is good at facilitating meetings, that's what they do.

Mr. Stephenson: How expensive are the meetings?

PD charges for 2.5 hours for the meeting, plus preparation and travel, which works out to \$300 to \$500 per meeting. However, most Comp Plan projects are set up on a 'fixed fee' basis, with explicit goals. PD often writes controls into the contract that limit the number of meetings they can attend, but PD does not 'nickel and dime' their clients on this.

Question 11: What is a reasonable budget?

Mr. Eyerman didn't know the answer because there were 3 or 4 pieces of Raymond's grant application that didn't quite make sense to him. For example, mail surveys are very expensive and Raymond's proposed budget does not adequately cover the expense of a quality mail survey. How much will Raymond volunteers process? How much detail does Raymond want to collect? Ogunquit spent about \$6K on a mail survey. Another example: an update of the inventory will vary in cost dependent on whether PD can work with Raymond's GIS maps and other products. How much does Raymond want to do and how much do you want PD to do? With regard to Public Participation, a normal budget for 'visioning' in most communities is about \$6K. It takes a lot of work to do it right. Raymond budgeted \$1K. The cost of Implementation and policy building will depend on how far 'out of the box' Raymond would like to think. Basically, the lower figure of \$22K is tight, but \$34K would be a decent budget to work within.

Question 7: Focus and Organize Committee

Mr. Eyerman doesn't like to yell. PD's role is to define what the questions are and to give the committee enough information to help them answer those questions. PD expects to have to keep the Committee on task. PD is not a proponent of strict scheduling (minute by minute) for meetings. Like to allow for interaction and backtracking. Don't like to throttle too tightly. However, it is important that, when the Plan goes to Town Meeting, the Committee is in agreement, is consistent, is credible. This has to be the Committee's plan.

Question 8: Role in producing the final Plan

Planning Decisions expects to do the majority of the drafting and to put the document together. Raymond would edit PD's document and PD would assemble the final package. However, PD is willing to do this however Raymond would like.

Mr. Stephenson: How long will the project and process take?

Too long! It will take time to involve the public. A realistic goal is to complete this plan in a year or more. Some communities have done plans in 3 months, others in 3 years.

Mrs. Algeo: How do you envision the public forums going?

Planning Decisions will create the format, work to put together the agenda and exercises. Forums would consist of small group exercises with Committee members facilitating. PD would train the Committee members. The first forum should be a chance for the Committee to listen and for the public to put their issues out. Visioning may be part of this - people perceive certain threats to quality of living. Committee needs to understand what's on the minds of residents. The second session should be non-directive, but structured. Give specific tasks or problems for the public to work on, but don't give specific alternative solutions. Let the residents come up with their own alternative solutions.

Mr. Burnham: What is Planning Decisions' experience with Visioning and prioritizing?

The objective for the end of the public forums is to have the beginnings of 'closure'.

Mr. Burnham: Would Planning Decisions work with other professionals on the Raymond project?

This depends on what role PD would have. Teaming often works, but PD is not interested in sharing the 'fun' stuff. PD is happy to contract out the 'grunt' work. For example, PD has contracted to SMCOG to do the grunt work on projects in York County and this has worked very well. It's important to understand who does what, and who's telling who what to do. PD would work very happily with GPCOG.

Mr. Eyerman was dismissed at 9:00 P.M.

GPCOG has rescinded their proposal to provide full-scale Comprehensive Planning services to Raymond. Karen Martin, who had proposed to lead the GPCOG team, resigned from GPCOG three days after her interview with our Committee. GPCOG could still provide some technical assistance on the Plan update.

Mr. Burnham described the project he has asked the schools to participate in. He's asked the teachers to have the kids describe what they want the town to look like in 20 years. He's asked that the children bring their ideas home to their parents and have the parents express their ideas. Mrs. Algeo suggested that the results of this project would make a nice display at the May Town Meeting.

Next Meeting: The Committee agreed that it would like to meet in one week, on March 28, to review the interview information and decide on a consultant for this project.

Jim Stephenson adjourned the meeting at 9:20 P.M.

Respectfully submitted,

Elizabeth Algeo