

**FITZGERALD & HALLIDAY INC.**  
**SCOPE OF WORK**  
**BOROUGH OF NAUGATUCK PLAN OF CONSERVATION AND DEVELOPMENT**  
**UPDATE**  
**4-17-2012**

***Plan Context and Purpose***

The last plan of conservation and development for the Borough of Naugatuck (the 2001 Plan) was completed in 2001 and had a ‘traditional’ content. That is, it catalogued a full range of natural and community existing conditions, described land use patterns, and offered a map of proposed future land use along with related mapped ‘plans’ for other elements of the community such as open space. The purpose of this project is to update the 2001 Plan to examine changes in community conditions, provide a vision for the community for the future, and articulate goals, policies, and actions to be undertaken to lead the Borough towards the vision over time.

The following scope of work lays out a process through which the Borough of Naugatuck POCD will be transformed into a dynamic, living document. It will be one that meets Connecticut statutory requirements for such a plan, and includes a community vision statement; along with strategic direction for the next ten years with a road map to meeting the community’s shared objectives. To do this, this scope of work includes the following tasks:

- Task 1: Collaboration and Community Engagement
- Task 2: Community Analysis
- Task 3: Visioning and Issues Identification
- Task 4: Implementation Program Development
- Task 5: Prepare the Plan of Development Update Document

The anticipated schedule for completing these tasks is shown in Attachment B which follows this Scope of Work. It includes the potential time-frames for all meetings and workshops included in this Scope of Work.

**Task 1: Collaboration and Community Engagement**

Borough Collaboration: FHI will work collaboratively with the Town Planner on an ongoing basis to conduct the study tasks. We will meet up to three times during the study to monitor project progress and prepare for upcoming tasks. FHI’s Project Manager will also be available on a day-to-day basis to discuss project direction via phone or email.

Planning Commission (The Commission): FHI will work with the Planning Commission for the project duration. The Commission’s role will be to provide review and comment on study steps, products, and schedule; to help compile existing available community data; and to support the community engagement process. FHI will meet with the Commission three times and otherwise communicate with its members via email or telephone. We will meet at milestones when there is a substantive agenda to cover and tangible work progress can be made during the meeting. The meeting agendas are expected to cover:

- **Meeting #1** – Project Kick-off – the agenda will include (1) review of the study process and schedule; (2) review of community trends findings; (4) discussion of Commission support to publicize the Community engagement and visioning process; (5) Discussion of Commission members’ vision and thoughts on issues and opportunities
- **Meeting #2** – Review of the draft SWOT matrix, and draft vision statement with associated goals and objectives; brainstorming on a range of strategies and actions that could be included in the Action/Implementation Plan
- **Meeting #3** – Review draft Plan and Implementation Program

A fourth conference call may be conducted to discuss the draft plan as it is finalized, if warranted.

Community Engagement: FHI will work to publicize the POCD update process and encourage community participation through both traditional and innovative media outlets. Elements of this task will include:

- FHI will provide information on the plan update process and schedule for posting to the Borough website by the Borough staff
- FHI will work with the Borough Planner to develop a process for him to disseminate information about the plan such as direct mail, posting of flyers, sending flyers home in children’s backpacks, along with an email distribution list to send email blasts inviting the public to the Community Workshop (see Task 3 below).
- FHI will provide a flyer publicizing the workshop for the Borough’s inclusion in the traditional distribution/ email blast.
- FHI will provide handouts, comment forms, and other supporting materials for the conduct of the Community Workshop.
- FHI will work with Borough staff to plan POCD Update publicity and invitations for community input at strategic times, such as in conjunction with other civic activities, and venues to capture opportunities to reach residents

### **Task 2: Community Trends Analysis**

Community analysis is a process during which FHI will identify existing conditions and trends and assess existing assets, issues, and opportunities in the Borough, which will then subsequently be correlated to community vision, goals, and policies. The community analysis will, therefore, be a two-step process. Step one will be the compilation and evaluation of conditions and trends. Step Two will be the analysis of strength, weaknesses, opportunities, and threats to the community’s future.

Conditions and Trends: The focus of this task will be on the interpretation of collected data and identification of trends; rather than cataloguing of community attributes. As such, FHI will rely on existing studies, data, reports, interviews with Borough staff and other knowledgeable individuals or organizations, and available mapping as the basis of the trends identification. It is assumed that the Borough will compile relevant past studies and maps for use by FHI. We will spend one day in the Borough conducting interviews with focus groups or individuals to collect additional information and resources from them. In addition, we will compile data from the 2010 U.S. Census and other online state and federal data sources to supplement the documentation provided by the Borough and interviewees.

Resources which have changed little since the 2001 plan will receive a brief review and are expected to include:

- Natural resources such as topography, water resources, and groundwater
- Roadway, transit, bicycle and pedestrian infrastructure
- Historic resources
- Community facilities
- Physical infrastructure – water, sewer, and utilities

Resources to be considered in more depth in the context of change over the last decade will include:

- Demographic trends
- Housing trends
- Traffic patterns
- Economy: business and employment trends
- Community design - Land use patterns and development trends

We will prepare maps and tables depicting all of these resources with concise supporting narrative.

Conditions Analysis: The conditions analysis will look at the Borough's strengths, weaknesses, opportunities and threats (SWOT) from the perspective of community quality of life. A SWOT analysis is a tool used to look at and understand attributes of an area and categorize them. The objective is to consider how those attributes, in the context of the four categories, can influence the achievement of community goals.

To accomplish this for this project, the FHI team will utilize the conditions and trends findings along with the results of the issues and assets documentation (from the Commission input and online survey results from Task 3 below) to develop a matrix categorizing the strengths, weaknesses, opportunities, and threats. From this matrix, conclusions will be drawn about what the matrix is telling us about Naugatuck and what related strategies could be most beneficial in directing the Borough's future. We will review the matrix, conclusions and related strategies with the Commission and refine the strategies list based on our collective discussion. Subsequently, the implementation plan tasks will be determined based on the selected strategies.

Topics the SWOT matrix will address will include;

- Land use and Zoning
- Community Character
- Housing
- Economy
- Transportation System
- Environment
- Infrastructure
- Community Facilities and Institutions
- Regional Context
- Context of Connecticut's growth management principles

### **Task 3: Visioning and Issues Identification**

Through this task, FHI will develop and articulate a vision statement for the Borough. We will also document community consensus on the Borough's assets and issues. These will be developed through the following steps:

- Online Survey: A survey will be prepared and distributed through several online venues. It will include questions about what the community values most about the Borough, is concerned about, and wishes and wants for the future. We will tabulate the survey results and prioritize individual items based on the input received.
- Community Visioning Workshop: Building upon the online survey, the FHI Team will conduct a hands-on, interactive community workshop the same day as, and following the second Commission meeting. The purpose will be to generate discussion to help define the Borough vision and solicit feedback on the draft SWOT matrix. Attendees will then be prompted to answer questions related to their values, likes, dislikes, worries, and thoughts about what is missing or should be preserved in the Borough. Finally, attendees will be asked about what they would change in the Borough and how they would go about accomplishing that change.

If desired by the Borough, and as an alternative to the community workshop, FHI will prepare a "booth" or kiosk for use at an upcoming community event. The "booth" will have information about the plan update, a summary of the conditions and trends findings, and copies of the community survey that visitors can complete. FHI will prepare handouts and display materials for the "booth" and will provide one staff person to occupy the booth for one afternoon or evening (up to 4 hours). It is expected that the Borough would also provide someone to occupy the "booth" during the event.

Following the community visioning workshop (or community event), FHI will finalize the Community Analysis with strategies package, vision statement, and related goals and objectives. The final draft will be shared with the Commission for its input.

#### **Task 4: Implementation Program Development**

Based on the vision, community analysis, selected strategies, and identified goals and objectives, FHI will develop a program of recommended actions to implement the vision and its complementary policies. From this, we will identify priorities, initiatives, and potential phasing of the implementation plan elements. We will review the implementation program proposal with the Commission and finalize it based on their input (Meeting #3).

The implementation program will include a process for annual updates to the plan. As a dynamic document, the POCD's strategies can be expected to be implemented incrementally. The Plan can, thus, be annually revisited and amended to reflect completed action items and refined to address new issues, adjust a course of action or Identify next steps in ongoing initiatives. To facilitate this, we will provide a matrix of tasks with benchmarks and recommend a process for an annual evaluation of how the community has changed and the benchmarks have been met, or not. This annual benchmarking process will provide a foundation for adding new information, strategies, and tasks to the plan to keep it current. Our recommended benchmarking process will be complementary and consistent with state statutory requirements for comprehensive plans.

#### **Task 5: Prepare the POCD Update Document**

This is the stage of the planning process through which the plan is composed and finalized. It will include the Community Analysis, Vision, Goals and Objectives, Community Engagement findings, and Implementation Program. As part of this task, FHI will develop a series of maps depicting the community's preferred future land use form, related transportation system, and other key community recommendations. At a minimum, the plan will include information on:

- Community focal points for future development and redevelopment such as the downtown
- Housing mix by location
- Existing and proposed preserved open space
- Bicycle and pedestrian networks including greenways, and
- Connectivity among transportation modes and land use such as rail and the sidewalk system and opportunities for Transit-Oriented-Development

FHI will prepare a draft plan for review and comment by the Commission. Based on comments received, we will prepare the final draft for consideration by the Planning Commission. This scope of work does not include FHI participation in the Borough hearing process for plan adoption. If this is desired at the time this step in the process is reached, this would be considered supplemental to this scope of work.

***Deliverables:*** FHI will provide the Borough with 12 copies of the draft plan and 25 bound copies of the final plan for its use. Maps will be 11x17 and Z-folded into the Plan. The plan will also be provided on CD/DVD in Adobe Portable Document File (pdf) format for ease of making copies and posting on the Borough website. FHI will provide technical assistance to the Borough with posting the POCD update to its website in a user-friendly and downloadable form. In addition to the deliverables included above, all digital material developed by the FHI Team as part of the study will be given to the Borough of Naugatuck in its native format on CD's/DVD's (whether it be a Word document, GIS, or Excel document or graphic file for example).

## **ATTACHMENT B**

### **BOROUGH OF NAUGATUCK PLAN OF CONSERVATION AND DEVELOPMENT UPDATE ANTICIPATED PROJECT SCHEDULE**

**As of April 20, 2012**

#### **MAY 2012**

- Project Kick-off
- Data Collection
- Initiate Trends Analysis
- Team field day – conduct interviews

#### **JUNE 2012**

- Complete trends analysis
- Develop Community Survey
- First Commission meeting

#### **JULY 2012**

- Develop compendium of trends tables and maps
- Begin SWOT analysis (strengths, weaknesses, opportunities, threats)
- Conduct community online survey
- Conduct community event - booth

#### **AUGUST 2012**

- Compile findings of community survey
- Draft Naugatuck Vision Statement, with goals, policies statements
- Continue Community SWOT analysis

#### **SEPTEMBER 2012**

- Complete SWOT Analysis
- Finalize Naugatuck Vision Statement with goals, policies statements
- Second meeting with the Commission - review SWOT analysis with the Commission and finalize based on feedback received

#### **OCTOBER 2012**

- Initiate development of Implementation Plan
- Start to compose the draft Plan Update document

#### **NOVEMBER – DECEMBER 2012**

- Continue to develop draft plan – solicit and receive Planning Commission feedback

**JANURAY 2013**

- 2012 POCD final draft complete
- Third meeting with the Planning Commission to present the full Plan Update

**FEBRUARY- MARCH 2013**

- Final edits made to POCD Update

**CHART VIEW – BOROUGH OF NAUGATUCK POCD UPDATE  
ANTICIPATED SCHEDULE**

