Chapter 4

Phase I: Start-up

Much of the work that one would otherwise expect to find at the start of a buildable land analysis will already have been completed as part of the project this report summarizes. Methods and data sources have been identified, and various jurisdictions have reviewed and agreed to those methods. Nonetheless, some organization at the beginning of the project may be required to address the following topics:

- **Final methods and definitions.** This report essentially completes this task, however, some additional work may be necessary to refine methods and definitions as the County begins to implement them.

- **Project management.** This report makes recommendations on scope, schedule, budget, and responsibilities. Since it has been developed with the assistance of the TAC, there should be little left to do. The County will need to officially assign a County project manager to coordinate the project activities through the life of the project.

- **Staffing and staff assignments.** Overall coordination and management of the project is important to its success. Appendix D provides estimates of staffing and costs that have been accepted by the TAC. It may be necessary to make some adjustments based on final information about available funding.

- **Request for proposals.** If the County chooses to use a consulting team to conduct elements of the project, it will need to agree on what the work program, schedule, and budget for the consultant will be. The County would then draft and issue a request for proposals from qualified consultants. This process will take at least six weeks from initiation to contract; probably longer.

- **Project kick-off meeting.** This is the last step in the startup phase. The County will organize a project kick off meeting with the jurisdictions to get organized and review the scope and sequence of project tasks.

Most of the tasks above have already been largely accomplished as part of this project; this work program describes the agreements of the TAC about these issues. Thus, the work effort is primarily about process, As noted in Chapter 3, we organize the Tasks chronologically.

It is important to note that some of the Phase II data collection work (see Chapter 5) can overlap with the startup tasks. Many of the data elements will not require additional discussion or formal agreement. Examples include population and employment data, annexations, building permits, and subdivision data.
For our discussion of scheduling in this phase and subsequent ones (Chapters 5 and 6), we assume that the project starts in July 2000 and runs 22 months through the end of May 2002. It will be clearer to give specific dates then general times like "Month 5." If the project starts later, the dates will have to be adjusted.

**TASK 1.1: ASSIGNMENT OF COUNTY PROJECT MANAGER**

We assume that the manager will be Steve Toy, and that his role in the project will be formally acknowledged by the County Planning and Development Services Department.

**TASK 1.2: PROJECT ORGANIZATION**

The County Project Manager will check on all deadlines and funding sources to make sure that they are correct and approved as reported in this document. He will make any necessary adjustments. He will assign staff to the project. He will prepare an agenda for, and convene, the TAC kick-off meeting.

**TASK 1.3: TAC MEETING**

The purpose of this meeting is to make any final decisions about scope, budget, schedule, staffing, or procedures. It should include discussion and agreement on the basic program of agency, interest group, and citizen involvement and review. This meeting could include discussion of consultant selection procedures.

**TASK 1.4: CONSULTANT SELECTION (OPTIONAL)**

Depends on TAC decisions. If it is decided that a consultant is needed, then allow a minimum of six weeks from release of RFP to signing of contract. Our experience with County contracting suggests it could easily take twice that long.

**TASK 1.5: FINAL AGREEMENTS ON SCOPE**

Meeting(s) to make sure everyone knows the objectives, procedures, deadlines, and responsibilities.

**SUMMARY OF PHASE I**

**PRODUCTS**

- **Product 1:** Final scope, schedule, and budget for the project
- **Schedule:** By end of July 2000
- **Discussion:** This report may be sufficient. If minor amendments are made, they should be documented in a memorandum attached to this report. If major amendments are made, this
report should be changed and reprinted.

**Product 2:** Interim interjurisdictional agreement on scope, products, schedule, and responsibilities  
**Schedule:** By mid August 2000  
**Discussion:** In order for the technical work on this project to commence according to this schedule, there needs to be interim interjurisdictional agreement on the recommended buildable lands analysis approach. This agreement may be informal (e.g., an e-mail response to a request for approval) or semi-formal (e.g., a returned signature on a letter from the County to a city planning director or elected official noting that this work program will be implemented). Formal interjurisdictional acceptance of the recommended buildable lands methodology and work program awaits final SCT approval, which usually takes an additional 4 to 8 months.

**Product 3:** Decision on hiring consultant(s) under contract (optional)  
**Schedule:** By mid August 2000  
**Discussion:** If the TAC and County decide to hire a consultant, then this Phase requires an RFP, evaluation of responses, selection of consultant, and negotiation and signing of a contract.

**TAC AND PUBLIC MEETINGS**

**Meeting 1:** TAC meeting  
**Schedule:** End of July 2000  
**Decisions:** Final agreement on scope, budget, schedule, responsibilities

**Meeting 2:** Project kick-off meeting /Consultant selection (optional)  
**Schedule:** Mid-August 2000  
**Decisions:** TAC, other city reps, County staff, (consultants)