



TOWN OF IRVINGTON

**PROPOSAL FOR COMPREHENSIVE PLAN SURVEY,
COMPREHENSIVE PLAN & ZONING CODE UPDATE
SUBMITTED BY THE BERKLEY GROUP, LLC ON AUGUST 30, 2021**



The Berkley Group, LLC

Andrew D. Williams, Chief Executive Officer

P.O. Box 181

Bridgewater, VA 22812

drew@bgllc.net

540-560-2202



August 30, 2021

Town of Irvington, Planning Commission
Attn: Brian Forrester
P.O. Box 174
Irvington, VA 22480

Re: Proposal for Comprehensive Plan Survey, Plan & Zoning Code Update

Dear Mr. Forrester:

The Berkley Group is pleased to submit a proposal to conduct a Comprehensive Plan Survey and update the Town of Irvington's Comprehensive Plan and Zoning Code. We are local government leaders and managers who know and understand the challenges facing localities. With our Virginia planning and zoning expertise and experience, we will align the comprehensive plan and ordinances with the Town's values and aspirations. We have worked with historic towns, cities, and counties to create individually tailored plans resulting in vibrant, thriving communities.

The proposed scope of services includes a community-wide survey and other community engagement activities to gather broad and inclusive input from residents, businesses, visitors, and other stakeholders. With the public's valuable input, the Town's Comprehensive Plan update will respond to community needs, address current conditions, reflect its unique character, and maintain compliance with the Code of Virginia. Following the newly adopted comprehensive plan, the Town's Zoning Code will be updated to reflect community's vision in ways that are clear, concise, understandable, and legally defensible. Our team is ready and willing to support the Town in this important endeavour, which will influence the community's character, economy, and quality of life for years to come.

The Berkley Group, LLC (EIN 27-3021021; SCC ID# S1606971) is a SWaM certified business (#704335) focused on providing superior service to local governments. Darren Coffey and I are firm principals authorized to conduct negotiations and execute agreements. ***We are prepared to begin this assignment immediately upon a signed notice to proceed and are committed to the Town's success.*** Please do not hesitate to contact me should you have any questions.

Best Regards,

Andrew D. Williams, AICP
Chief Executive Officer

II. FIRM BACKGROUND

The Berkley Group, LLC is a Virginia based local government consulting firm with over 40 employees. Our offices are in Charlottesville, Harrisonburg, Northern Virginia, Richmond, and Roanoke. Formed by Andrew Williams and Darren Coffey in 2010, the Berkley Group specializes in providing direct services such as land use and transportation planning, capital project management, communications, community engagement, and group facilitation. *While 100% of our work is dedicated to serving local governments, land use planning and ordinance development are our firm’s primary strengths.* The Berkley Group understands local governments because we have worked in local government and continue to serve them proudly.

DARREN COFFEY, AICP
PRINCIPAL-IN-CHARGE
 HEADQUARTERS
 P.O. BOX 181
 BRIDGEWATER, VA 22812

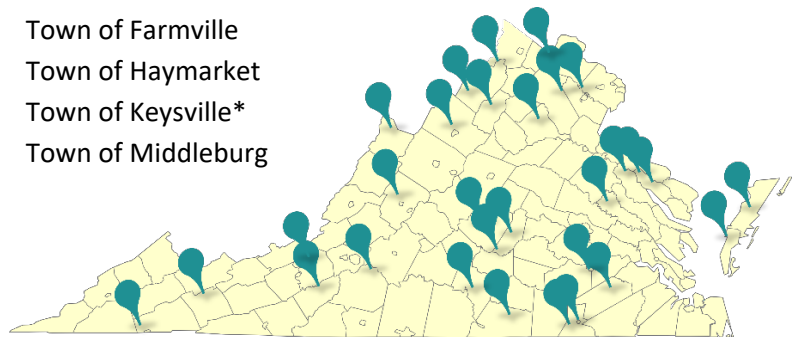
Key Services

- 🔑 Comprehensive planning
- 🔑 Zoning and other ordinance amendments
- 🔑 Public involvement and facilitation
- 🔑 Executive Recruitment
- 🔑 Grant application and administration
- 🔑 Local projects management through VDOT
- 🔑 Project development and management
- 🔑 Capital facilities planning
- 🔑 Compliance with local/state/federal regulations

Experience

The Berkley Group has performed comprehensive plan updates, amendments and diagnostics in the following localities (* denotes current projects):

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> ▪ City of Emporia ▪ City of Harrisonburg ▪ City of Lexington ▪ City of Manassas ▪ City of Martinsburg, WV ▪ City of Petersburg ▪ Caroline County ▪ Greensville County* ▪ Highland County ▪ Essex County* ▪ King William County* ▪ Mecklenburg County ▪ Northampton County ▪ Prince William County | <ul style="list-style-type: none"> ▪ Rappahannock County ▪ Richmond County* ▪ Sussex County ▪ Town of Abingdon* ▪ Town of Crewe* ▪ Town of Dumfries ▪ Town of Farmville ▪ Town of Haymarket ▪ Town of Keysville* ▪ Town of Middleburg | <ul style="list-style-type: none"> ▪ Town of Mount Jackson ▪ Town of Occoquan ▪ Town of Round Hill ▪ Town of Strasburg* ▪ Town of Warrenton |
|--|---|--|





Optional Subconsultant Partners

The Berkley Group offers optional subconsultant services with *one of the premier authorities in Virginia land use law, Greehan, Taves & Pandak, PLLC (GTP), the talented designers at Land Planning & Design Associates (LPDA), as well as the expert researchers at UVA’s Center for Survey Research (CSR).* Based on the Town’s needs, the Berkley Group can leverage GTP, LPDA and CSR’s expertise to support the Comprehensive Survey, Plan and Zoning Code update.



Greehan, Taves & Pandak (GTP) is a Virginia law firm with offices in Fairfax and Woodbridge, Virginia. GTP serves as legal counsel for numerous Virginia local governments with substantial work in the areas of zoning and land use.

GTP attorneys have litigated hundreds of cases in circuit court on behalf of local governments, represented localities before the Virginia Supreme Court, and state and federal courts, as well as before boards of zoning appeal and other administrative bodies. Firm attorneys have been involved in some of the key land use cases in the Commonwealth. They have the knowledge, abilities, and experience to successfully handle complex and innovative land use matters, both as advisors and litigators. GTP attorneys have worked with local planners, as well as outside consultants, to draft zoning ordinances and subdivision ordinances, relying on their years of local government and litigation experience.

GTP’s involvement will provide a unique Virginia-focused legal perspective to ensure that the Town’s updated zoning ordinance is based on sound legal practices and legally defensible.

**SHARON E. PANDAK
PARTNER
WOODBRIDGE, VA
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703-680-5543**



Land Planning and Design Associates (LPDA) is a landscape architecture and planning firm providing services since 1971. LPDA designs places for people. Their process focuses on involving the end user and client in a meaningful way, so that need and function are translated to the built environment. LPDA’s work includes a variety of design and development efforts focused on improving the quality of

life, environment, and economics of our communities. LPDA specializes in designs that enrich lives, facilitate social equity and create tangible economic value. LPDA is currently working on, or has recently completed, destination parks, urban plazas, stormwater retrofits, pedestrian amenities, farmers’ markets and event spaces for municipal clients. LPDA has delivered over 35 million dollars in construction of parks, trails and community amenities and has overseen the development and entitlements of 3,000+ dwelling units, from the North East to the Hampton Roads region of Virginia. They are currently working in and around Irvington to design the TriWay trail.

As part of the Berkley Group team, LPDA’s renowned graphic work will provide supporting graphics to illustrate concepts discussed in the Comprehensive Plan such as diagrams, vignettes and lot density diagrams. For the zoning code, LPDA’s graphic work will be instrumental in developing highly illustrative ordinances that will be easily interpreted by both staff and citizens.

**BILL MECHNICK
PRESIDENT
CHARLOTTESVILLE, VA
bill@lpda.net
434-270-7065**



WELDON COOPER CENTER
for PUBLIC SERVICE
CENTER for SURVEY RESEARCH

Center for Survey Research (CSR) combines expert faculty, experienced staff, and advanced technical facilities to bring the best tools of quantitative and qualitative social

science to the service of local government and state agencies, non-profit and private-sector clients, and academic researchers. Since its founding in 1988 as an interdisciplinary research and service organization, CSR has conducted thousands of telephone, mail, web and in-person interviews. CSR specializes in providing full-service survey methodology, including customized project design, professional interviewing, data collection, and data analysis. CSR continues to lead and innovate in conducting surveys and utilizing multi-mode approaches to ensure high completion rates. CSR is a unit of the Weldon Cooper Center for Public Service at the University of Virginia.

CSR is well equipped to conduct a research study capturing the perspectives and priorities of the Town’s residents, local business, and visitors. CSR offers two significantly significant survey options with customized questionnaires for each key stakeholder groups.

KARA FITZGIBONS
DIRECTOR
CHARLOTTESVILLE, VA
ksf5fe@virginia.edu
434-243-5224

III. REFERENCES

Mr. Scott Davis, Town Manager
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434-392-5686
sdavis@farmvilleva.com

Mr. William Moore, Deputy Town Manager
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Middleburg, VA 20118
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Mr. Matthew Arcieri, Director of Planning & Community Development
City of Manassas
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703-257-8232
marcieri@manassasva.gov

Mr. Charles Kolakowski, County Administrator
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Mr. Jim Halasz, City Manager
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jhalasz@lexingtonva.gov

Mr. James Morani, Town Manager
Town of Abingdon
133 West Main Street
Abingdon, VA 24210
276-492-2134
jmorani@abingdon-va.gov

IV. PROJECT TEAM

The Berkley Group brings a *reputable and diverse team* of professionals to this project. Our team is committed to working with staff, public officials, stakeholders, and citizens to produce a comprehensive plan and zoning code update that aligns with the Town's aspirations and values. In addition to Berkley Group's own land use experts, our proposed partners offer legal, design, and survey services to further enhance the project. With our team's technical skills and experience, the Berkley Group will ensure project milestones are met efficiently and effectively.

The assigned project manager is Ms. Rebecca Cobb. She will oversee daily project direction with the support from the Berkley Group's team of planners with expertise in housing, economic development, historic preservation, and environment. Ms. Cobb has a strong project management record of delivering high quality projects on realistic, expedited timeframes. Ms. Cobb's current and anticipated work commissions with the estimated completion dates during the proposed project period include the following:

- Town of Abingdon Zoning and Subdivision Ordinance (07/2022)
- Town of Crewe Comprehensive Plan (06/2022)
- King George County Zoning and Subdivision Ordinance Update (07/2023)

Ms. Cobb and the project team have the time, resources, and capacity to successfully conduct a Comprehensive Plan Survey and update the Town's Comprehensive Plan and Zoning Code in a timely manner. ***We are committed to providing consistent high-quality services to our clients.*** Therefore, we will not accept any work that would impact this project or subsequent projects with the Town.



Darren Coffey, AICP, Principal-in-Charge, has served the public sector since 1995. He began his professional career as a Park Planner in Charlotte, NC; a Town Planner and Community Development Manager in Blacksburg, VA; and then as Planning Director in the Counties of Louisa and Fluvanna, VA. Darren brings comprehensive experience in local government including administration, planning, budgeting, economic development, grant administration, transportation, parks and recreation, among others. This in-depth experience allows him to see issues from different viewpoints to achieve and craft the best solutions. Darren is a certified planner with a master's in Geography from Rutgers University.



Kelly Davis, AICP, Planning Director, is a customer-driven project manager and skilled facilitator. She joined the Berkley Group from the historic City of Manassas where she supported the comprehensive zoning ordinance rewrite and managed planning studies for parks, housing, and community facilities. She led the 2040 Comprehensive Plan update, which earned *APA Virginia Awards for 2020 Plan of the Year* and *Innovative Approaches* for community engagement. With the Berkley Group, Kelly has managed Comprehensive Plan updates for the City of Lexington, Town of Farmville, Northampton County, and Greenville County. Kelly is a certified planner and holds a master's degree in Urban and Regional Planning and Certificate in Economic Development.



Rebecca Cobb, CZA, Project Manager, has over 13 years of planning experience, having served as the Planning/Zoning Administrator for Buckingham County. With the Berkley Group, she has collaborated on comprehensive plan updates for Northampton County and the Towns of Farmville and Crewe; led a housing study for Lunenburg County; and led zoning and subdivision ordinance updates for the counties of King William and Essex and the Towns of Farmville, Mount Jackson, and Farmville. Her grassroots experience allows her to understand all views at the table and brings them together cohesively for the betterment of the community. She has a biology degree with a minor in environmental science from Longwood University.



Catherine Redfearn, Project Support, brings invaluable perspective to the project both as a seasoned planner with over 15 years of planning experience across the country and with local knowledge as a native of the Northern Neck. Her experience spans comprehensive plans, preservation plans, historic district design guidelines, land use planning, zoning, and small area plans – with the overarching interest of helping small communities and rural areas facing growth pressure to protect and build plans based on their unique character, history, and assets. With the Berkley Group, Catherine has supported Comprehensive Plans for Northampton County, Richmond County, City of Lexington, and the Town of Farmville. Catherine has a master's in Urban and Environmental Planning from the University of Virginia.



Stephanie Mathena, Project Support, has over two years of design, engagement, and policy planning experience, previously working for Charleston, SC, and Franklin County, VA. Since joining the Berkley Group, Stephanie has supported zoning and subdivision ordinance diagnostics and updates for King William and King George Counties, City of Emporia, and the Towns of Abingdon, Warrenton, and Strasburg. She is also currently developing the Richmond County Comprehensive Plan and historic district guidelines for the City of Manassas. With her Adobe and Sketchup expertise, she creates visually engaging and accessible land use plans and promotional materials. Stephanie has a master's degree in Urban and Regional Planning from Virginia Tech.



Darla Orr, SME, QA/QC, brings 32 years of service to the Berkley Group after a public service career in both rural and urban settings in North Carolina and Virginia. Her local government service began working for the Martin County Economic Development Commission in Williamston, NC, where she assisted in growing the County's economic base and with zoning compliance and building construction. In 1990, Darla began her over 23-year career with the Chesterfield County Planning Department, serving as a Planner. From 1996-2001, she served as the Director of Planning for Brunswick County, VA, before returning to Chesterfield County to serve as a Planning Administrator, where she remained until her retirement. Throughout her career, Darla has updated comprehensive plans for Brunswick and Chesterfield County. She currently serves as contract staff for the Town of Mount Jackson and is intimately familiar with the planning and zoning challenges facing small towns.

Optional Subconsultant Project Team

Sharon E. Pandak, Esq., GTP, Legal Review Support, is a partner with GTP. Sharon focuses her legal practice on diverse legal issues facing localities, other public entities, and associations interested in public policy. Sharon has provided extensive advice regarding zoning and planning matters for Virginia localities. She has also worked on the related issues of transportation and other public facilities, environment, public-private partnerships, economic development and eminent domain. Sharon is a graduate of William & Mary Law School.



Bill Mechnick, PLA, LPDA, Graphic & Illustrative Support, has over 20 years of experience with landscape architecture, land planning and public participation. He has led the design of a diverse range of projects including parks and recreation, downtown revitalization, mixed use communities and institutional projects. He is experienced with providing landscape architecture services in the northeast, mid-Atlantic and southeast. Bill received his Bachelor of Science from West Virginia University and received the ASLA honor award for excellence in the study of landscape architecture. He is a registered Landscape Architect in the states of Virginia, West Virginia, North Carolina, and Florida and is a member of the Virginia Recreation and Parks Society and the American Society of Landscape Architects.



Kara Fitzgibbon, Ph.D., CSR, Survey Research Services, is the Director of the Center for Survey Research. Dr. Fitzgibbon has worked at CSR since 2012. In that time, she has served as Principal Investigator on numerous projects and been involved at all stages of the research process, including project design, questionnaire development, data collection, analysis, and reporting. She is known for her project management skills, attention to detail, and effective communication with clients. Dr. Fitzgibbon is a member of the American Association for Public Opinion Research (AAPOR), serves on their Inclusion & Equity Committee, and has regularly presented at their annual meetings. Additionally, she is currently serving on the Association of Academic Survey Research Organizations (AASRO) Executive Committee. She received her Ph.D. in Sociology from the University of Virginia with specialized training in survey methods and statistical analysis. Dr. Fitzgibbon also holds a master's degree from UVA, and she received her bachelor's degree from Washington and Lee University.

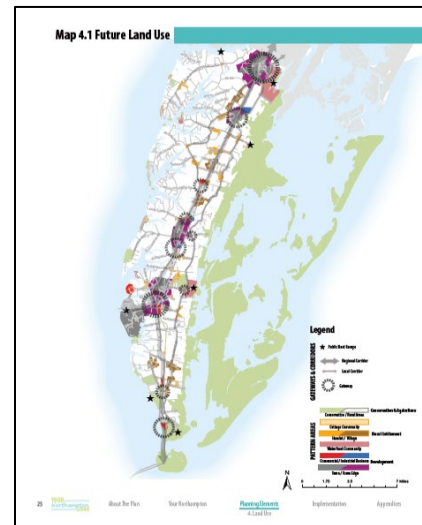
V. EXPERIENCE OF THE FIRM

YOUR 2040 COMPREHENSIVE PLAN NORTHAMPTON COUNTY

Project Manager: Kelly Davis, AICP

Team: Rebecca Cobb, Catherine Redfearn, Steph Mathena

The Berkley Group worked with Northampton County to update their Comprehensive Plan. Northampton is a rural and ecologically unique community located on the Eastern Shore of Virginia. The County boasts working waterfronts, charming towns, and agriculture, aquaculture, and tourism industries reliant on the area’s abundant natural resources. The challenge of the comprehensive plan was to protect these resources, while creating a more prosperous and resilient community. The plan addresses complex challenges of infrastructure, housing affordability, social equity, climate change adaptation, and hazard mitigation, among others. The project included a diagnostic of the existing Comprehensive Plan to ensure compliance with the Code of Virginia and Chesapeake Bay Preservation Act requirements; extensive community input, including multiple public workshops, stakeholder interviews, and a community survey provided in two languages; technical mapping and analysis to target development areas while protecting natural resources; coordination with VDOT to ensure Chapter 729 compliance; and streamlining the plan to succinctly demonstrate community values and goals while providing actionable implementation strategies in a highly visual and accessible format. The comprehensive plan was adopted in June 2021.



COMPREHENSIVE PLAN, ZONING & SUBDIVISION ORDINANCE UPDATE

TOWN OF FARMVILLE, VA

Project Manager: Kelly Davis, AICP

Team: Rebecca Cobb, Catherine Redfearn

The Berkley Group completed an update of all the Town of Farmville’s Land Use Tools - Comprehensive Plan, Zoning Ordinance, Subdivision Ordinance, and Zoning Map. The Town of Farmville is a small, but vibrant community located in the heart of Virginia. Home to two universities, multiple cultural and recreational destinations, and a charming downtown - Farmville has many of the assets necessary to support economic development and resiliency. Like many small towns, the community struggles with job growth and retention. The challenge of the comprehensive plan was to promote future development that creates a more prosperous and resilient community while continuing to align with the Town’s vision and goals. The Comprehensive Plan update was closely coordinated with a zoning and subdivision ordinance update. The project included a diagnostic of the existing ordinances to determine compliance with the Code of Virginia, examining land use definitions, and modernizing and streamlining the ordinance while maintaining compatibility with community values and Comprehensive Plan goals. The project was completed in 23 months with adoption in June 2020.



**2040 COMPREHENSIVE PLAN UPDATE
CITY OF LEXINGTON, VA**

**Project Manager: Kelly Davis, AICP
Team: Catherine Redfearn**

The Lexington 2040 Comprehensive Plan defines a vision for the City of Lexington, Virginia, that acknowledges a difficult past while building an inclusive and progressive path forward. Organized around a series of five planning values rooted in community, equity and resilience, the plan tackles issues such as climate change, diversity, housing affordability, fiscal sustainability, alternative transportation, and governance. The policies and strategies in the plan are a result of an extensive and collaborative planning effort that included input from the citizens of Lexington, the insight of focus groups and community experts, the guidance of the City’s Planning Commission, and facilitation by the Berkley Group. The development of a plan addressing such weighty and complex issues required understanding, sensitivity, and depth of knowledge. Developing a plan during the onset of a global pandemic and nation-wide social unrest required creativity and the skillful use of virtual engagement platforms to ensure the planning process continued to be fair, open, and accessible to all of Lexington’s residents. The result is a plan that was adopted with overwhelming community support. The document itself was designed as a 21st century planning tool, using maps, graphics, and links to make the content easily understood and accessible to a variety of audiences. Lexington 2040 is a modern comprehensive plan, developed for a historic community, looking to create a more resilient and equitable future. The plan was adopted in Fall 2020.



**ZONING & SUBDIVISION ORDINANCE UPDATE (UNDERWAY)
TOWN OF ABINGDON, VA**

Project Manager: Rebecca Cobb

Since 2019, the Berkley Group has worked with the Town of Abingdon in a phased update of their Zoning and Subdivision Ordinances. In early 2020, the Berkley Group performed a diagnostic of the Town’s Zoning and Subdivision Ordinances. The Berkley Group also provided a content-neutral sign ordinance consistent with federal case law, which was adopted in September 2020. Building off this diagnostic, the Berkley Group is conducting a comprehensive update of the ordinances with LPDA providing supporting graphics. Adoption is anticipated in April 2022. A key focus of this update is to:

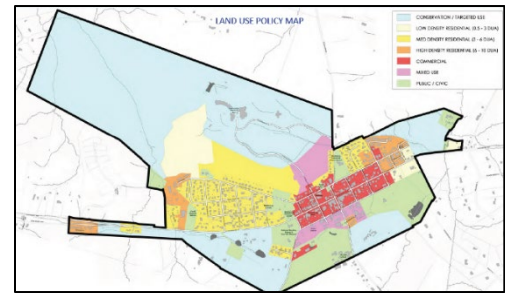


- Align the ordinances with the newly adopted Comprehensive Plan;
- Preserve historic areas of the Town;
- Provide community design guidelines to beautify entrance corridors and commercial areas;
- Encourage redevelopment of existing and underutilized structures and properties; and
- Retain the existing character of the town while adapting to new development trends and demands.

**COMPREHENSIVE PLAN UPDATE
TOWN OF MIDDLEBURG, VA**

Project Manager: Mr. Darren Coffey, AICP
Team: Catherine Redfearn, LPDA

The Town of Middleburg, known as the heart of Northern Virginia’s horse country, is located in Loudoun County. It is a popular visitor destination due to its rich historic character, vibrant downtown shopping district, and resort amenities. Further development within the Town is anticipated in the coming years and must be carefully planned to ensure future development continues to align with the Town’s vision and goals. To this end, the Berkley Group and LPDA worked together with the Town to update its Comprehensive Plan. The project included a comprehensive plan diagnostic, public input survey, public workshops, Town vision and goals, development scenario analysis, fiscal impact analysis, transportation analysis, GIS mapping, and implementation steps. The project also included corridor improvement strategies and conceptual streetscape designs for the Federal Street Corridor to facilitate the extension of Middleburg’s thriving downtown district. The updated plan was adopted in 2019.

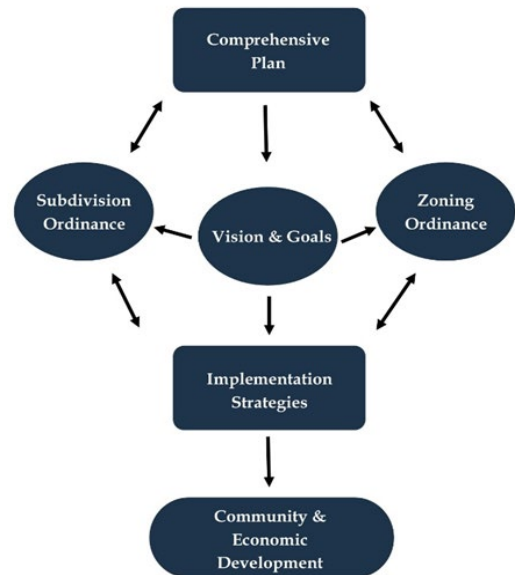


References for each project may be found in III. References.

VI. PROJECT UNDERSTANDING & APPROACH

Approach

The Berkley Group offers a team-based approach that combines our knowledge as Virginia land use experts with the local knowledge of Town staff, community leaders, and the public. Our team offers a fresh, independent perspective grounded in planning principles and best practices from Virginia and around the country. The Town’s citizens, stakeholders, representatives, and employees are the key local experts that bring a unique perspective to the final development of this project. *The Town of Irvington’s Comprehensive Plan and Zoning Code update will accurately reflect the community’s vision and goals, rather than those of the consultant or any one interest group.* The final plan and ordinances will be tailor-crafted to meet the Town’s needs.



Plan of Services Overview

The Berkley Group works closely with its clients and their staff to *produce high-end, professional work products that are individually tailored to local needs and goals.* We have worked with dozens of Virginia localities to perform similar services to those in this project. The Berkley Group will be on-site as needed and communicate with assigned staff and stakeholders regularly via scheduled reports and milestone briefings to ensure the success of the project. Our priority is *defining the community’s shared vision and goals* through a trusted engagement



process and **providing clear, concise, and legally defensible land use tools** that will achieve that vision. We aim to exceed our client's expectations and actively seek client feedback on our work products, conducting project management meetings as needed to keep on schedule and within budget.

Comprehensive Plan Survey

Kick Off Meeting

The Berkley Group will begin the project by conducting a virtual kick-off meeting with Town staff to finalize the project's scope, expectations, and deliverable, and timeline. This kick-off meeting will occur within 30 days of contract execution and should include employees from any departments deemed necessary so that their roles and responsibilities in the Survey, Comprehensive Plan and Zoning Code update process can be discussed and clarified. We will use this time to gather information and identify critical success factors for the project.

Survey Methodology, Target Population & Reporting

The Berkley Group will develop, administer, and manage a community-wide survey for the Town of Irvington. The survey will be **designed to gather the opinions of full-time residents, part-time residents, landowners, business owners, and renters**. The Berkley Group will develop survey questions in collaboration with the Town. The survey will be prefaced with introductory materials explaining the purpose of the Comprehensive Plan (and Zoning as appropriate). The draft survey will be available for review and comment during a kick-off work session with the Planning Commission and Town Council. Following this review, the Berkley Group will refine and finalize the survey for administration.

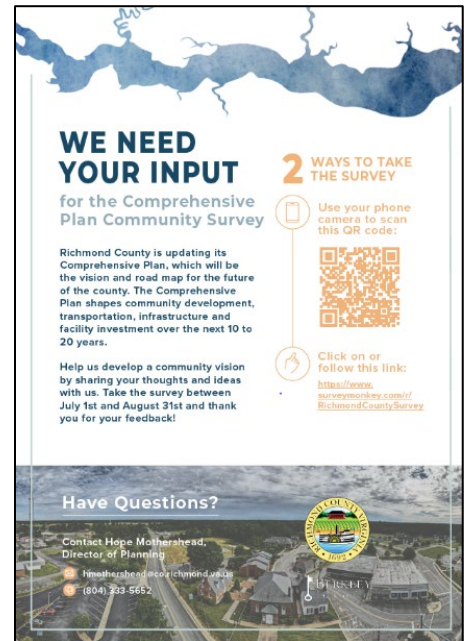
The Berkley Group will conduct a community-wide survey via two survey collection methods: 1) an open link online survey instrument; and 2) a hard-copy survey mailed to residents. The Berkley Group uses SurveyMonkey, an online survey instrument, with a dynamic interface and optimized to process large amount of data. Hard copies of the survey will be provided to the Town as a PDF to be mailed to residents and/or property owners. Mailing hard copies of the survey is highly recommended for part-time residents and those with limited broadband access. To incentivize community engagement in the survey, the Town may offer a prize drawing for passes to local events or gift cards to local businesses.

The survey will be active for 60 days to ensure individuals have adequate time to complete the survey. Once the survey is closed, data will be collected and analyzed. As a baseline, we will provide an aggregated summary of responses with charts and graphs to visually depict the results, as well as an export of all responses to Microsoft Excel format. If desired, we can also analyze and report responses based on specific parameters (e.g., resident status, age). The Berkley Group will provide a presentation of the survey's summary data and results to the Planning Commission, Town Council, and the community.

Optional Service: In lieu of the proposed survey approach typically used in our Comprehensive Plan process, our partners at the CSR offer statistically significant survey options for the Town.

Promotional Materials

Public and stakeholder outreach is paramount to capture the shared vision and goals of the community. The Berkley Group will develop flyers to encourage broad participation in the community survey and other public engagement opportunities. Flyers, handouts, guidance documents, and advertisements will have a reader-friendly design, straightforward language, and visually appealing graphics. These materials will be provided to the Town to be distributed at local businesses and shared on the Town’s Facebook page and website. **We also recommend and will offer content for a dedicated webpage to provide information on meeting dates, times, and locations, as well as educational materials, draft documents, and the project schedule.** With these promotional materials, the Town’s residents and stakeholders will be aware, informed, and engaged in the Survey as well as the Comprehensive Plan and Zoning Code update process.




Comprehensive Plan Update

We believe in helping communities become thriving, resilient places that people are proud to call home. Working with the whole community, we create plans that are grounded in place, responsive to market trends and forces, based on fiscal reality, and focused on implementation. As collaborators with our clients, we create processes that allow the community to take ownership of the process and final document. We listen, facilitate conversations, and then fold everything into a vision with goals, policies, and specific recommendations resulting in a plan that is based on **PEOPLE, PLACE and PERFORMANCE**.

Existing Comprehensive Plan Assessment

The Berkley Group will perform a full review of the Town’s existing 2017 Comprehensive Plan to provide a historical reference and framework for the update. This will include **a diagnostic to ensure compliance with the Virginia Code, Chesapeake Bay Preservation Act, and community planning best practices.** The diagnostic evaluates the Town’s current plan and provides a path forward that will ensure compliance with Virginia Code and incorporate best practices from American Planning Association. The inclusion of best practices helps facilitate discussion of community priorities and possibilities above and beyond state standards. The review of the 2017 Comprehensive Plan will serve as the foundation for the update.

City of Petersburg, Virginia
Comprehensive Plan Best Practices Diagnostic Matrix



Principle	Description
1. Livable Built Environment	Ensure that all elements of the built environment, including land use, transportation, housing, energy, and infrastructure, work together to provide sustainable places for living, working, and recreation.
Yes/No	Best Practice
Yes	1.1 Plan for multi-modal transportation
Partial	1.2 Plan for transit-oriented development
Partial	1.3 Coordinate regional transportation investments with job clusters
Yes	1.4 Provide complete streets serving multiple functions
Yes	1.5 Plan for mixed land-use patterns that are walkable and bikeable
Yes	1.6 Plan for infill development
Yes	1.7 Encourage design standards appropriate to the community context
Yes	1.8 Provide accessible public facilities and spaces
Yes	1.9 Conserve and reuse historic resources
No	1.10 Implement green building design and energy conservation
Yes	1.11 Discourage development in hazard zones

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Public Input

The Berkley Group will work collaboratively with the Town to engage the community in an efficient, comprehensive, and unbiased manner.

The Berkley Group utilizes a robust public outreach strategy to collect input and ensure popular support of the project.

Our goal is to provide a wide-reaching, inclusive, and informative community engagement strategy that empowers the public, seeks out feedback and input, and maintains continued public participation throughout the process. In addition to the public survey, our proposed scope includes a public workshop and stakeholder listening sessions to provide qualitative insight and deeper understanding of community issues. Some communities also desire additional outreach, such as intercept surveys, pop up booths at community events, or “listen and learn” walking tours.

We would be happy to discuss and scope additional community outreach services or otherwise tailor our strategy to meet the Town’s specific needs.



We understand the importance of engaging the community in land use projects.

Public Workshop

The Berkley Group will conduct and facilitate a public workshop to ensure broad and representative input. ***Our tested small-group facilitation process ensures that all ideas are heard and no single voice dominates.*** The public input workshop will give residents and community stakeholders the chance to learn what a comprehensive plan is, how the plan will be used, and what it means for the future of the Town. This workshop will also allow the public to voice their expectations, as well as to point out the positives and negatives of their community experience. The Berkley Group will develop all maps, materials, and handouts and provide a summary of participant responses.

Stakeholder Listening Sessions

The Berkley Group will conduct up to four listening sessions with key stakeholder groups identified by the Town Council, Planning Commission, and Town Staff. Stakeholder groups typically include representatives of the development and real estate community, business owners, tourism agencies, and youth, among others. The Berkley Group will meet with stakeholders to discuss the existing comprehensive plan, receive feedback, identify what is working and opportunities for improvement. If desired, additional listening sessions may be added and scheduled at critical points in the process to solicit feedback on key revisions, such as the future land use map.

Joint Work Sessions

The Berkley Group will ensure that the Planning Commission and Town Council are engaged in the Comprehensive Plan update process through joint work sessions. The first presentation to the Planning Commission and Town Council will occur prior to the community survey to kick off the project, identify key issues, and encourage constituent involvement. The Berkley Group will facilitate additional work sessions to collect feedback and direction throughout the drafting process. To ensure efficiency and continuity throughout the process, we propose holding joint work sessions between the Planning Commission and Town Council as a best practice. This approach may be modified as appropriate for the Town.

Draft Plan Elements

Based on the results of community input and existing Comprehensive Plan assessment, we will update the Comprehensive Plan to reflect the community’s authentic character, identity, and vision. Exact elements of the updated Comprehensive Plan will be determined in consultation with Town Council, Planning Commission, and Town staff. Each element will include policy and design elements of future development with a focus on providing for economic, environmental, and social sustainability.

Community Assessment

As a first step in drafting, we will identify the most important issues and desirable qualities based on the Survey findings and other public input opportunities. The community assessment will not only document public input; it will inform the development of a Comprehensive Plan Vision Statement that is based on the collective input of residents, business owners, and other community members. The community assessment and resulting vision statement will serve as the overarching principle for the Comprehensive Plan, guiding the development of goals and strategies for each Planning Element.

Strengths and Weaknesses

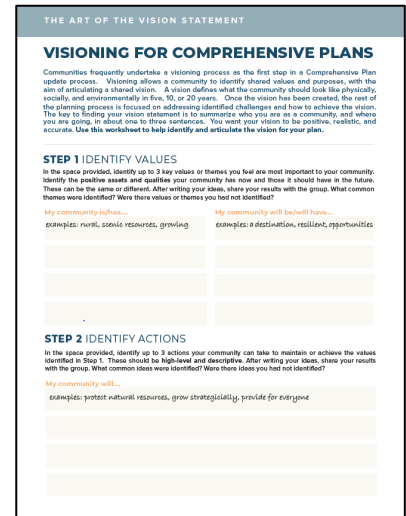
Achieving Irvington’s vision for the future requires an understanding of today’s strengths and weaknesses. By understanding the opportunities and challenges facing the community, Irvington can decide what works and what it can do better. The Plan will identify key strengths and problems affecting the community and provide actionable goals and action strategies to address them.

Existing Conditions

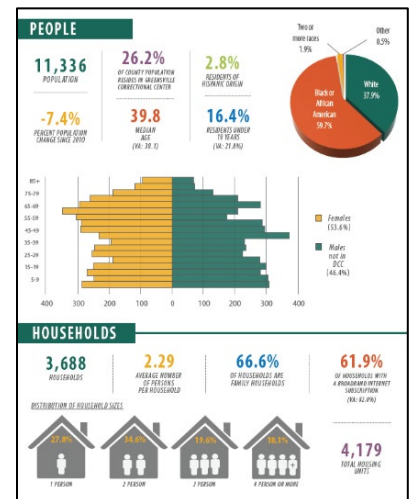
Development of the Comprehensive Plan policy will be informed by a baseline analysis of current conditions. The Berkley Group will collect, analyze, and update relevant data including, but not limited to, population projections utilizing Weldon Cooper Center Data; demographics, housing, and economic indicators utilizing data sources such as the 2020 US Census and Virginia Employment Commission; natural and historic resources; and land use. Our planners take pride in translating these complex statistics and technical data into charts and infographics that are attractive and easy for the community to understand.

Plan Elements

Utilizing our team’s extensive land use planning experience, the Berkley Group will draft policy chapters that correspond to the Town’s needs, meet statutory requirements, and define goals that highlight the community’s



Our visioning tool translates community input into a defined Vision for the future.



Example infographics developed by the Berkley Group.

strengths and address identified weaknesses. The draft chapters will include specific and measurable implementation strategies, which will be reviewed and vetted with the Planning Commission and Town Council. The draft chapters will also include the update, revision, and development of plan maps, graphics, charts, and tables, including Future Land Use and Transportation maps. We will also coordinate with relevant agencies, such as VDOT, to ensure the draft Plan complies with the Code of Virginia.

The resulting document will be a highly visual plan that includes photos, maps, and design guidance to clearly define the desired character of the community.

Optional Service: LPDA can provide more detailed vignettes and concept diagrams for development and streetscaping for an additional fee.

Implementation Plan

Plan implementation must be an integral component of decision-making for staff and elected officials. We develop clear steps and provide a schedule of actions necessary to implement plan recommendations. The implementation plan will build on the strategies included in each plan element by identifying tools, responsible parties, and anticipated timeframes for completion. The implementation plan can also be used to set specific performance indicators to help track the Plan's effectiveness over time.

Public Review & Open House

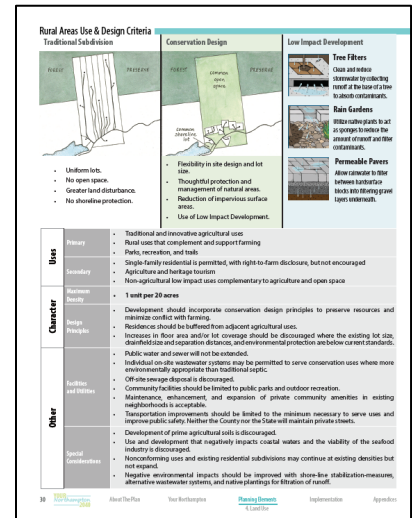
The draft Comprehensive Plan should be easily understood by community members and present a clear path forward for the Town. For this reason, draft elements should be presented to the public for review and revision before any official acknowledgement or adoption. The Berkley Group recommends a **public open house** to present the draft Comprehensive Plan to the community. The purpose of the open house is two-fold: 1) **Educate** the community on the content of the plan; and 2) **Engage** the community to collect feedback on the proposed content. This informal public review maximizes the public's opportunity to ask questions and provide feedback. The Berkley Group will provide open house materials and the draft Comprehensive Plan for public review and posting online.

Refinement & Final Revisions

After the public open house, the Berkley Group will facilitate a joint work session meeting to present and review public comments with the Planning Commission and Town Council. The Berkley Group will assess public comments and recommend any changes needed to address community concerns. After the work session has been held, and all feedback and comments have been received from Town staff, the public, the Planning Commission, and Town Council, the Berkley Group will incorporate comments and make final revisions to the proposed plan.

Plan Adoption/Deliverables

The public review process will result in a community-supported plan that is ready for endorsement by the Planning Commission and adoption by Town Council. The Berkley Group will assist in presenting the draft plan through the public adoption process. This will include supporting the public notification process and presenting the draft plan



Our plans are highly visual and include images and graphics to support proposed concepts.

during public hearings before the Planning Commission and Town Council for final adoption. The Berkley Group will provide the Town with one (1) digital PDF copy with print-ready graphics prior to the public hearings.

Once the final Comprehensive Plan has been adopted, the Berkley Group will provide a final print-ready digital PDF Comprehensive Plan with print-ready graphics in Microsoft Word and PDF formats. Digital files of any maps will be provided in Esri GIS-compatible format

Zoning Code (Ordinance) Update

Our team will assess and update the Town’s zoning code to create a legally defensible code that supports and implements the newly adopted Comprehensive Plan. Our proposed approach will preserve the existing elements of the zoning ordinance that are working and modify those that are not. We understand that the Town is not anticipating extensive updates to the zoning ordinance. As such, we are not proposing a full restructuring or addition of new zoning districts; however, we will work closely with staff to ensure that the new ordinances are user friendly and streamlined. The Berkley Group’s collaborative, tested approach will enable our team to direct the project as an extension of the Town’s staff and public officials.

Review of Comprehensive Plan and Existing Code

Utilizing our proprietary diagnostic tool, the Berkley Group will perform a diagnostic of the zoning ordinance to identify opportunities to implement the newly adopted comprehensive plan and ensure compliance with state code. The diagnostic will be based on legal requirements for zoning contained in Virginia Code Sec. 15.2, federal case law, input from staff, and our professional recommendations. As a tidewater locality, the diagnostic will also consider compliance with Chesapeake Bay Preservation Act regulations. This diagnostic, along with strategies identified in the Comprehensive Plan, will serve as the foundation for the ordinance update and determine the changes required for compliance and alignment with the newly adopted comprehensive plan.

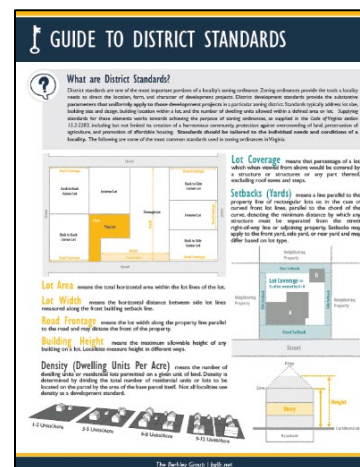
Community Outreach & Engagement

With the newly adopted comprehensive plan, the Berkley Group recommends conducting one public input workshop and up to four stakeholder listening sessions. The Berkley Group proposes the same community outreach and engagement approach as detailed in the comprehensive plan update. We can tailor this approach as needed to meet the Town’s expectations.

We will also ensure that the public is aware of and understands the purpose of the zoning ordinance update. Our collection of educational guides explain complex zoning concepts in ways that are simple, easy to understand. These resources can be made available at the Town offices and on the Town’s website.

Joint Work Sessions

The Berkley Group will conduct up to four joint work sessions with the Planning Commission and Town Council during the ordinance development,



The Berkley Group’s educational guides help the public understand important zoning ordinance elements.

drafting, and adoption process. Additional work sessions will be scheduled throughout the ordinance drafting process prior to public hearings and adoption process.

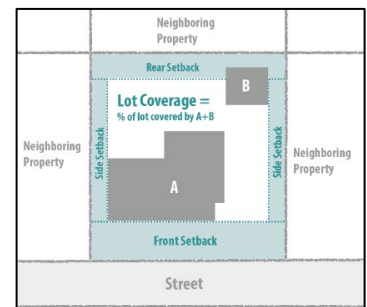
Draft Ordinances

The Berkley Group will clarify and update the zoning ordinances utilizing the diagnostic, community outreach results, and the Comprehensive Plan. ***The updated ordinances will be logically organized and simply stated, with illustrations where appropriate.***

The updated ordinances will be written ***to reinforce the vision, goals, and objectives of the community’s plan.*** Ordinance drafting will be divided into phases based on the content and structure agreed upon by Planning staff, information from the public outreach process, and key stakeholders. Joint work sessions with the Planning Commission and Town Council will provide policy direction at major project milestones.

The Berkley Group will apply our extensive experience with the Code of Virginia to ensure that the updated ordinances fully comply with all state code provisions. The ordinances will have a clear statement of purpose derived from the vision, goals, and objectives of the Town’s Comprehensive Plan, along with the purposes of zoning regulations as set forth in Section 15.2-2283 of the *Code of Virginia*.

To promote efficiency, predictability, and reduce the need for interpretation, the draft ordinance will contain ***clear and concise definitions***. Graphics, illustrations, and tables will explain development requirements and add clarification, as appropriate. The lists of permitted uses will be revised and placed into a streamlined use matrix as a user-friendly alternative to static lists of uses. The Berkley Group will provide ***tables for uses*** as well as ***basic illustrations for commonly misinterpreted terms***, such as lot coverage, lot width, and building height. The updated ordinances will strike an appropriate balance ensuring that new development and redevelopment of all types will be compatible with existing and planned land uses of surrounding properties.



Example Berkley Group graphic demonstrating lot coverage.

Review and Refinement

Once the proposed ordinance draft is complete, copies of the draft ordinance, as well as a summary memo detailing the structure of the ordinance and major changes proposed, will be delivered to the Town for review and comment. The proposed draft and critical elements of the ordinances will be made available for the public to review and provide comments and suggestions. The draft ordinance will be provided in Microsoft Word, Adobe PDF, and Internet-ready formats.

The Berkley Group will lead a public review workshop to review the draft ordinance and collect community feedback. Following public review, the Berkley Group will facilitate work sessions with the Planning Commission and Town Council, where the proposed ordinance revisions will be presented and discussed. These work sessions will focus on substantive changes and will include graphics, tables, illustrations, and crosswalks to explain the proposed ordinance. After the work sessions have been held, and all feedback and comments have been received from Town staff, the public, the Planning Commission, and Town Council, the Berkley Group will address comments and make any and all necessary final edits and revisions to the proposed ordinance.

Public Hearing and Adoption

Once all final edits and revisions have been completed, the Berkley Group will lead the ordinances through the public hearing process. Public hearings are legally required and should reflect the public input efforts throughout the ordinance development. ***While it is typical for there to be differing views, the value of the inclusive participation process should be evident at these hearings.*** The Berkley Group will work with the Town Attorney and planning staff to ensure ordinance changes are properly advertised and provide copies of the proposed ordinance prior to the public hearings.

Optional Service: GTP can conduct a legal review of the draft ordinance prior to public hearing.

Post-Adoption Deliverables

The project will conclude with the Berkley Group providing the required one (1) electronic copy of the adopted ordinance, with the date of adoption prominently displayed on the front cover and throughout the document and other supporting documents in Microsoft Word, Adobe PDF, and Municode compatible internet-ready formats. These files will include all supporting documents, including any charts, graphs, tables, maps, and illustrations.

Optional Services

We recognize that every community has different needs and priorities. We will work with the Town of Irvington to modify the proposed scope to fit the community's needs and budget constraints. The following supplemental services are available and may be negotiated for an additional fee to fit the community's needs:

- Targeted surveys for specific user groups by the Berkley Group (e.g., businesses, visitors, youth).
- Material for pop-up booth/intercept surveys at special events to gather onsite feedback from visitors.
- Three distinct, statistically significant customized surveys for Town residents, local businesses, and visitors. The residential and commercial stakeholder groups are surveyed via a push-to-web design. The visitor stakeholder group is surveyed via an open-source web option. This survey will be developed, managed, and administered by the Center for Survey Research. Detailed methodology available by request.
- Three distinct, statistically significant customized surveys for Town residents, local businesses and visitors. The residential and commercial stakeholder groups are surveyed via a dual-mode, mail-forward design. The visitor stakeholder group is surveyed via an open-source web option. This survey will be developed, managed, and administered by the Center for Survey Research. Detailed methodology available by request.
- Additional public outreach meetings (virtual or in person).
- Additional work sessions with Planning Commission and/or Town Council.
- External legal review by Greehan, Taves & Pandak.
- Supporting graphics and illustratives by Land Planning & Design Associates.

Please note that the above-mentioned surveys, meetings, and workshops may impact the proposed Comprehensive Plan and Zoning Code update timeline.

VII. TIMELINE FOR PROVIDING PROPOSED SERVICES

The Berkley Group proposes the following project timeline based on the the identified project scope and the Town’s availability. ***The Berkley Group Team is available immediately and through the project’s successful completion.***

		PROJECT TIMELINE																																								
Phase	#	Task Description	2021			2022												2023								2024																
			October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July						
Ongoing	-	Meetings/Coordination with Staff																																								
Survey	A1	Kick-off Meeting with Staff (Virtual)																																								
	A2	Kick-off Work Session/Survey Pretest			X																																					
	A3	Survey																																								
	A4	Survey Presentation of Results						X																																		
Comprehensive Plan	B1	Comp Plan Assessment / Plan Diagnostic																																								
	B2	Public Workshop							X																																	
	B3	Stakeholder Listening Sessions (up to 4)							X																																	
	B4	Joint Work Sessions (up to 4)								X		X		X		X																										
	B5	Community Assessment, Vision, About the Plan																																								
	B6	Demographic Data / Baseline Analysis																																								
	B7-13	Content Drafting																																								
	B14	Implementation Plan																																								
	B15	Mapping																																								
	B16	Plan Layout & Graphics																																								
	B17	Public Draft Review + Open House																																								
	B18	Final Review Work Session (1)																																								
	B19	Incorporate Final Revisions																																								
	B20	Public Adoption (1 joint hearing)																																								
	B21	Final Deliverables / Production																																								
Zoning Code	C1	Document Review & Diagnostic																																								
	C2	Public Input Workshop																																								
	C3	Stakeholder Listening Sessions (up to 4)																																								
	C4	Joint Work Sessions (up to 4)																																								
	C5-13	Drafting																																								
	C14	Basic Mapping Analysis and Graphics																																								
	C15	Public Review & Open House																																								
	C16	Pre-Adoption Work Session																																								
	C17	Incorporate Final Revisions																																								
C18	Public Adoption (1 joint hearing)																																									
C19	Final Deliverables / Production																																									

X = Anticipated In-person Attendance



VIII. COST

The Berkley Group completes projects *efficiently, on time, and within budget*. Working collaboratively with clients during the scoping phase, we can adjust the proposed scope and project approach to meet the Town’s budget expectations. It is anticipated that a final fee will be determined in partnership with Town staff to align the project scope with available funding. Please see our itemized budget, including all travel and incidental costs, below:

Phase	Task	Task Description	Total Cost	Est. Hours
Survey	A1	Kick-off Meeting with Staff (Virtual)	\$ 385.00	6
	A2	Kick-Off Joint Work Session/Survey Review	\$ 2,860.00	44
	A3	Survey (online + hardcopy)	\$ 4,300.00	66
	A4	Survey Presentation of Results	\$ 3,300.00	50
	A5	Project Management/Coordination with Staff	\$ 440.00	6
Comp Plan	B1	Comp Plan Assessment / Plan Diagnostic	\$ 6,620.00	108
	B2	Public Workshop	\$ 3,670.00	58
	B3	Stakeholder Listening Sessions (up to 4)	\$ 2,730.00	44
	B4	Joint Work Sessions (up to 4)	\$ 10,280.00	152
	B5	Community Assessment, Vision, About the Plan	\$ 3,670.00	58
	B6	Demographic Data / Baseline Analysis	\$ 4,420.00	68
	B7	Housing	\$ 4,420.00	68
	B8	Historic & Cultural Resources	\$ 4,120.00	64
	B9	Environmental Resources	\$ 4,720.00	72
	B10	Land Use & Development	\$ 7,095.00	113
	B11	Economy	\$ 4,420.00	68
	B12	Community Facilities	\$ 4,420.00	68
	B13	Transportation	\$ 4,420.00	68
	B14	Implementation	\$ 4,120.00	64
	B15	Mapping	\$ 6,270.00	98
	B16	Plan Layout & Graphics	\$ 5,720.00	88
	B17	Public Review + Open House	\$ 4,050.00	60
	B18	Final Review Joint Work Session (up to 1)	\$ 2,750.00	40
	B19	Incorporate Final Revisions	\$ 5,700.00	90
	B20	Public Adoption (1 Joint Hearing)	\$ 3,300.00	50
	B21	Final Deliverables / Production	\$ 920.00	14
	B22	Project Management/Coordination with Staff	\$ 1,710.00	26
Zoning Code	C1	Zoning Ordinance Review & Diagnostic	\$ 7,720.00	128
	C2	Public Input Workshop (1)	\$ 3,120.00	48
	C3	Stakeholder Listening Sessions (up to 4)	\$ 2,730.00	44
	C4	Joint Worksessions (up to 4)	\$ 10,280.00	152
	C5	Table of Contents / Ordinance Formatting	\$ 1,180.00	18
	C6	Definitions	\$ 1,620.00	24
	C7	District Standards (R1, R2, B1, B2, M1)	\$ 4,300.00	66
	C8	Chesapeake Bay Preservation Area Overlay	\$ 4,720.00	72
	C9	Community Design Standards (Signs, Lighting, Landscaping, etc)	\$ 4,120.00	64
	C10	Use Standards	\$ 4,120.00	64
	C11	General and Administration Provisions	\$ 1,510.00	22
	C12	Permit and Application Provisions	\$ 1,840.00	28
	C13	Nonconformities	\$ 1,840.00	28
	C14	Basic Mapping Analysis and Graphics	\$ 1,840.00	28
	C15	Public Review & Open House	\$ 4,050.00	60
	C16	Final Review Joint Work Session	\$ 2,570.00	38
	C17	Incorporate Final Revisions	\$ 7,815.00	121
	C18	Public Adoption (1 Joint Hearing)	\$ 3,300.00	50
	C19	Final Deliverables / Production	\$ 920.00	14
	C20	Project Management/Coordination with Staff	\$ 1,710.00	26
Survey Subtotal			\$ 11,285.00	172
Comprehensive Plan Subtotal			\$ 99,545.00	1,539
Zoning Code Subtotal			\$ 71,305.00	1,095
Non-direct expenses including, but not limited to, travel, printing, supplies, etc. (4% of project cost)			\$ 7,285.40	
TOTAL			\$ 189,420.40	



The following supplemental services may be employed for an additional fee:			
Options	D1	Targeted Survey for Specific User Groups	\$6,000/survey
	D2	Special Event Intercept Survey Material	\$5000/event
	D3	CSR's Statistically Significant Push-to-Web Design	\$30,000
	D4	CSR's Statistically Significant Mail Forward Design	\$47,000
	D5	Additional Public Outreach or Open House Meetings	\$3500/meeting
	D6	Additional Work Session / Meeting	\$2650/meeting
	D7	External Review by Greehan, Taves & Pandak	\$13,650
	D8	Comprehensive Plan Illustratives by LPDA	\$23,000
	D9	Zoning Ordinance Illustratives by LPDA	\$23,000