Comprehensive Plans and Your Bottom Line

Presented by:

Diana Smith, Director
Municipal Services Division, MRB Group

Connie Sowards, Project Manager
MRB Group
Why a Comprehensive Plan?

“If you fail to plan, you are planning to fail.”

-Benjamin Franklin
Why a Comprehensive Plan?

“Know thyself.”

- Socrates
Why a Comprehensive Plan?

“As for the future, your task is not to foresee it, but to enable it.”

- Antoine de Saint Exupery
Why a Comprehensive Plan?

Comprehensive plans: Just a lot of talk?
Many benefits -
• To planners
• To governing boards
• To community members
• To businesses
• To State
Comprehensive Plan

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making…"
The role of local planning / Planning Board is generally focused on land use.

Day to day considerations:
1. Site Plan reviews – keeping local government on track
   - Is it ready for review?
   - Fees submitted
   - Elements in local code met
   - If a hearing is required when does it need to be held?
   - Action needs to be taken 62 days after submission if no hearing held
   - Is County Referral required? (County has 30 days to respond)
Local Planners / Boards

Typical considerations:

- Legal data (tax map #, owner name, date, north arrow, scale)
- Environmental impact: drainage, soil, archaeological, natural features
- Parking configuration
- Circulation: ingress and egress
- Screening and landscaping
- Signs
- Lighting
- Snow storage
- Location/dimension of buildings
- Adjacent land uses and features
Local Planners / Boards

Seeing the trees vs. the forest!

Comprehensive Plans force consideration of "the bigger picture"...

...over time.

Existing Comp Plan makes local planning decisions easier!

(the litmus test)
Comprehensive Plan

From a planner’s point of view...

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making...

Tool containing data that’s useful for day-to-day planning recommendations
Governing Boards

Special Use Permit: “The authorization of a particular land use that is permitted in a zoning law (is) subject to specific requirements that are imposed to assure that the proposed use is in harmony with the immediate neighborhood and will not adversely affect surrounding properties”

Variances: grant relief from strict adherence of local codes (based on hardship, inability to conform...)

Requirement -- result will not alter essential character of neighborhood
Codes often provide a laundry list:

- Minimum lot sizes, lot coverage & setbacks
- Buffering to address lighting, noise, odor etc.
- Traffic impacts (parking, access, etc.)

What happens when codes don’t adequately address the issues?

...or members argue about “the character of the neighborhood”? 
Decision Making

The goal:

- Consistency
- Fairness
- Ability to withstand challenge

The first two *weigh heavily* on the third!
When there is no precedent...

Land use decisions should always support the general welfare of the people (the community).
A comprehensive plan adds fire-power to a legal defense for decision making.

State law says:
Zoning and planning must be legislated and enforced “… in accordance with the comprehensive plan.”
Comprehensive Plan

From a governing board’s point of view...

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making...

Point of comparison (litmus test) to justify and defend decisions.
There is no better tool to determine the best interests of a community and its residents than a community-created comprehensive plan.

- Public education
- Public survey
- Workshops
- Public Hearings
Planning process is a vehicle for improved communication.
Finished product is the voice of residents in the community, reflecting what they want and need.
Greater chance of seeing goals implemented if the community “owns” them
Community ownership means goals “outlive” tenure of boards/members.
Comprehensive Plan

From a resident’s point of view...

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making...

They’re finally listening to me!
Economic Development

Comp Plan is a vision for the future of the community – can justify substantial investment.

• The Gould Hotel - $7 Mil infusion
• Bonadent – quality of life translated into $$$$$
• Restore New York - $2.5 Mil from the State
Plan goals often result in improved policies:

- Land use regulations
- Adoption of new laws guiding development, such as design guidelines, capital improvement budgets, and economic development activities

Developers / investors appreciate a clear path, with less opposition!
Business owners are often community members, too!

Non-resident business owners become invested “community members.”

The networking forms bonds!
Comprehensive Plan

From a business owner’s point of view...

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making...

Business development strategies / investments align with community goals (sustainability!)
Current “State of the State”:
• Tax Freeze Era
• Shared Services / Regionalism
• Sustainability
Current “State of the State”:

• Creation of REDCs
• CFA process
Comprehensive Plan

From the State’s point of view...

Defined by NYS statute:

“An expression of a municipality’s goals and recommended actions to achieve those goals; a document which focuses on intermediate and long-term protection, enhancement, growth and development of a municipality; an outline for orderly growth, providing continued guidance for decision making...
Comprehensive Plan

Context: the State’s interest in regionalization

Conveys to the State that community planning and goals recognize regional plans.

If the Comp Plan is in alignment with the REDC’s strategic plan, then a project that supports the Comp Plan supports the regional plan.

Having a Comp Plan can strengthen a funding application.
Practical Outcomes

From your perspective!

Services: What do residents really value/want?

Land uses: Are there issues? Are there tools to support development? Does zoning support economic sustainability?

Shared Services: Only with an understanding of needs/weaknesses can we have a viable target for shared services.

Direction: What will the community support?
A Comprehensive Plan can:

- Strengthen planning boards by providing a vehicle for influence on long-term community plans
- Serve as a foundation for planning board/governing board decision making
- Provide legal justification/defense for land use decisions
A Comprehensive Plan can:

- Improve communication from and to residents
- Promote regional approaches to local challenges
- Improve opportunities for external funding
A Comprehensive Plan can:

- Improve local codes/policies to clarify development processes
- Generate interest in private investment
- Save taxpayer dollars

Reduction in:
- Staff hours – data gathering, resident education, resident assistance, processing applications, etc
- Legal expenses (lawsuits can still come, but defense has some weighty credibility)

Increase in:
- Opportunities for funding
- Potential for shared services, identified compatibility
A Comprehensive Plan can:

- Improve local codes/policies to clarify development processes
- Generate interest in private investment
- Save taxpayer dollars
- Strengthen the community!
Population Change: 2000-2010
Best Practices
Town of Canandaigua
5400 Routes 5 & 70 West
Canandaigua, NY 14424
(585) 595-3120 / Fax: (585) 594-9776

NOTICE TO ALL
PLANNING BOARD APPLICANTS
FOR SITE PLAN APPROVAL
ONE STAGE
(Preliminary/Final Combined)

The applicant is responsible for the completeness of all forms for the application to be processed. All completed applications are subject to the rules and regulations as established by State of New York and the Town of Canandaigua. The Development Office cannot guarantee any board approvals for completed applications.

It is important that the applicant completes all of the information requested in this packet. Doing so will facilitate the review process by the Planning Board at a public meeting and will not cause unnecessary delays to either you or other applicants.

**Please Note: In addition to this packet, please check with the Zoning Officer regarding which building permit application(s) must be submitted with these forms.**

Town of Canandaigua
5400 Routes 5 & 70 West
Canandaigua, NY 14424
Phone: (585) 594-9776 / Fax: (585) 594-9776

ZONING BOARD OF APPEALS
AREA VARIANCE APPLICATION

NOTICE TO ALL APPLICANTS:

The ZONING BOARD OF APPEALS reviews submitted applications on a first-come, first-served basis. The number of applications scheduled for review will vary depending upon the number and complexity of the applications received.

The goal of the ZBA is to process all applications in a timely and efficient manner.

Applicant must see that all forms are filled out completely and accurately before the application can be processed. All completed applications are subject to the rules and regulations as established by the Town of Canandaigua and the State of NY. This department does not guarantee any board approvals for completed applications.
Comprehensive Planning

The usual deterrent: Affordability.
Give a man a fish and you feed him for a day; teach a man to fish and you feed him for a lifetime.

- Ancient Proverb
An Innovative Approach

Grant request from NYSERDA:

• Four Allegany County communities –
  • Town of Alfred
  • Village of Alfred
  • Town of Wellsville
  • Village of Wellsville

Outcome:

• Four Planning Processes: Two Joint Comprehensive Plans
Worked with Kier towards project goals:

- Address individual questions / concerns
- Provide admin / process guidance
- Give guidance on content / reg. requirements
- Convey “lessons learned” from experience
- Individualized planning support
Project deliverables:

• Project website: www.alleganycompplanschool.com
Our Approach

Welcome to the Official Site of the Allegany County Comprehensive Plan School Project

This website has been provided by MRB Group to serve as an online resource for project participants. For more information about the project, please contact County Planner Kier Dirlam at (585) 268-7472 or diriamk@gmail.com.

An Innovative Project, Funded by NYSERDA

Often, Comprehensive Plans are lengthy, process-oriented projects. The time commitment alone can be daunting to community leaders who see its value, but aren’t sure how to proceed.

To address the need for affordable planning and to promote best-practices in the process, Allegany County Planner Kier Dirlam proposed a unique approach to providing planning and development services to local municipal governments by launching a “Comprehensive Planning School.”

This project will provide participating municipalities an opportunity to engage in this critical planning process by attending classes and utilizing resources provided by the County Planner and MRB Group, consultants selected to assist with the training.

The program began in March, 2015, with four local communities committed to a series of classroom activities and meetings. Each is designed to provide them the knowledge and tools needed to direct their own comprehensive planning process. The objective is to encourage community planning, give focus to Smart Growth principles and sustainability, and allow four Allegany County communities an opportunity they might not have been able to afford on their own.

The project received funding from the New York State Energy Research and Development Authority (NYSERDA), which recognized the innovative approach to enhancing efforts in multiple communities with limited financial resources.
Our Approach

Project deliverables:

- Project website: www.alleganycomplanschool.com
- 15 classes (lecture, discussion, Q&A)
- Administrative tools
- Planning tools
- Resources
- Focused expertise on LEED-ND / sustainability
- Local analysis, demographic data, maps
Quick start tools included:

• The Gantt Chart
• Public participation-level cost analysis
• Sample Community Survey
• LEED-ND checklist
• Sample Focus Group questions
• Infrastructure assessment worksheet
• The Conversation Map
Included in the training:

- Sample marketing / announcement cards
- Visioning/participation tools (external resource)
- Implementation Matrix
- Sample plan outlines
- PESTLE Exercise
## Comprehensive Plan Implementation Matrix Sample

<table>
<thead>
<tr>
<th>Goal:</th>
<th>Objective:</th>
<th>Strategy:</th>
<th>Timeline:</th>
<th>Benchmark:</th>
<th>Responsibility:</th>
</tr>
</thead>
<tbody>
<tr>
<td>To improve experience of visitors to community</td>
<td>Improve gateway appearance</td>
<td>Establish a committee of volunteers to adopt and care for gateway</td>
<td>Immediate</td>
<td>Committee Plan Development</td>
<td>T/V</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To provide funding for materials</td>
<td>May 2015</td>
<td>Town / Village Board Resolution</td>
<td>T/V</td>
</tr>
<tr>
<td></td>
<td>Improve downtown sidewalks</td>
<td>Establish budget reserve account / program</td>
<td>Immediate (2016-2017 Budget)</td>
<td>Village Board Resolution</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improve wayfinding (signage)</td>
<td>Apply for a DOT TEP grant</td>
<td>2016</td>
<td>Village Board Resolution</td>
<td>V</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Establish reserve account for grant match or self-funding</td>
<td>2016-2017 Budget</td>
<td>Village Board Resolution</td>
<td>V</td>
</tr>
<tr>
<td>Goal 2</td>
<td>Objective 1</td>
<td>Strategy 1</td>
<td>Date</td>
<td>Benchmark</td>
<td>Resp</td>
</tr>
<tr>
<td></td>
<td>Strategy 2</td>
<td>Date</td>
<td>Benchmark</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Objective 2</td>
<td>Strategy 1</td>
<td>Date</td>
<td>Benchmark</td>
<td>Resp</td>
</tr>
<tr>
<td></td>
<td>Strategy 2</td>
<td>Date</td>
<td>Benchmark</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Objective 3</td>
<td>Strategy 1</td>
<td>Date</td>
<td>Benchmark</td>
<td>Resp</td>
</tr>
<tr>
<td></td>
<td>Strategy 2</td>
<td>Date</td>
<td>Benchmark</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Objective 1</td>
<td>Strategy 1</td>
<td>Date</td>
<td>Benchmark</td>
<td>Resp</td>
</tr>
<tr>
<td></td>
<td>Strategy 2</td>
<td>Date</td>
<td>Benchmark</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Included in the training:

- One-on-one guidance
- Direct support
- As needed analysis / support
  - Survey result compilation
  - Infrastructure assessment review
- Assistance with documentation
Beyond the Classes...

**The Most Important Values of Wellsville**

- 60% Small-town Friendliness
- 11% Recreation
- 9% Culture
- 6% Education
- 6% Services
- 2% Low Utility Bill
- 2% Industry

<table>
<thead>
<tr>
<th>Suggested Changes</th>
<th>Suggestions</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small-town Friendliness</td>
<td>147</td>
<td>60</td>
</tr>
<tr>
<td>Recreation</td>
<td>27</td>
<td>11</td>
</tr>
<tr>
<td>Culture</td>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>Services</td>
<td>23</td>
<td>9</td>
</tr>
<tr>
<td>Education</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Low Utility Bill</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Industry</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>245</td>
<td>100</td>
</tr>
</tbody>
</table>
Beyond the Classes...

Importance of Services in Wellsville

- Fire Protection
- Streets/Snow...
- Ambulance
- Water/Sewer Services
- Police
- Trash Collection
- Health Services
- Senior Services
- Recreation/Parks/Playground
- Cultural Events
- Youth Services
- Zoning/Code Enforcement
- Permit/License Services

Legend:
- Very Imp
- Somewhat Imp
- Unimportant
Benefits of Approach

There are several benefits associated with Kier’s innovative approach:

• Less costly for each municipality
• Makes planning possible
• Communities utilize each others’ experience
• Communities support each others’ efforts
• Friendly competition inspires achievement
• Bonding experience both within and between communities
• Self-directed process allows communities to set the time-table
Detriments of Approach

Negatives associated with approach:

• Self-directed process allows communities to set the time-table!!
We’ve seen some other (indirect) benefits:
• Participants mentioned utilizing tools in other public meetings – have commented on success and usefulness
• Each community has “found” new volunteers, resources
• An increased appreciation for what planning can reveal
In Conclusion

- Understanding of character of the community
- Builds consensus
- Develops vision for future
- Legal justification for zoning / land use decisions
- Positions community for investment
In Conclusion

The comprehensive plan process is a step towards

Self-analysis...

....municipal efficiency

Proactive planning...

....creating a future of your own making

Generating investment...

....improving your community’s bottom line!
Diana Smith, Municipal Services Director
Connie Sowards, Project Manager
MRB Group

(585) 381-9250
(315) 283-3751
(315) 651-0888

diana.smith@mrbgroup.com
connie.sowards@mrbgroup.com