SESSION OVERVIEW

1. What is a Successful Meeting?
2. Preparation
3. Meeting Time!
4. Post Meeting
5. In Practice
6. In Summary
WHAT IS A SUCCESSFUL MEETING?
A SUCCESSFUL MEETING ...

Respectful

Be Prepared

Communicate

Know Regulations

Fair

SEQRA

Responsibility

Clear Next Steps
A Successful Meeting...

A Board Chair/Member Perspective:

- Do your homework
- Site visit (actual or virtual)
- Be attentive and respectful of all parties
- Ask appropriate questions at the appropriate time
- Concisely identify any additional information needed
- Have a basic understanding of review requirements and board responsibilities
- Clearly state reason(s) for a decision
- Prepare draft resolutions

A Chair’s Role:
- Manage flow of meeting and discussions
- Explain procedural steps for applicant, board and public
- Follow procedural steps consistently
- Allow opportunity for discussion/input by applicant, board, supporter and opponents
- Keep board members on task
- Time keeper

“It is about relationship building and trust. Though everyone may not agree with the outcome, it is important to be consistent, fair and respectful to all the parties.”
A SUCCESSFUL MEETING . . .

An Applicant’s Perspective:

- Board clearly identifies additional information needed
- Share public comments received with the applicant
- Board members have an open mind and leave political agenda at home
- Board members review an application based on validity of that specific project and review requirements
- Understand the zoning, SEQRA and other requirements for review
- Understand what is within the board’s purview (or not)
A Successful Meeting...

A Staff Perspective:

- Be prepared
  - Review application materials
  - Site visit

- Communicate with staff prior to meeting
  - Ask procedural or technical questions
  - Share questions for applicant in advance
  - Identify additional information needed from applicant

- Know your role
  - Stay in your purview box

- Become familiar with zoning and other local regulations

- Don’t treat the applicant or their representative as the enemy – be respectful

- Prepare draft resolutions
Preparation
**PREPARATION**

- **Review application materials in advance**
  - Application, SEQRA form, plans, graphics, staff comments, etc.
  - Checklist?

- **Familiarize yourself with the project**
  - Review zoning, comprehensive plan and other regulations applicable to that specific application (site plan, subdivision, variance, etc)
  - Site / project history
  - Neighborhood context
  - Environmental features (ex: wetlands, floodplains)
  - Infrastructure (ex: sewer, water)
  - Use online resources where possible
**Preparation**

- **Referrals from other boards/commissions**
  - Planning Board, ZBA, environmental/conservation committee, historic commission, etc.

- **Understand your role**
  - Advisory or approval authority
  - Application type (site plan, variance, etc.)
  - Prepare questions based on review purview
PREPARATION

- **Staff Reviews / Coordination**
  - Are there staff reviews?
  - Gather comments from various departments

- **Board Work Session or Internal Meetings**
  - Formal work session (advertised, open to public)
  - Staff meeting with Chair and Vice Chair
  - Discuss procedural steps and technical details
  - Caution: do not discuss via email or when a quorum is present

- **Site Visit**

- **Proper advertising and notification of meetings**
IT'S MEETING TIME!
Meeting Time

- Understanding of who will attend
  - Board members, governing body, public, special groups, media

- Chairman calls meeting to order

- Agenda
  - Some boards ask for approval of agenda
  - See if you can move items up that require less discussion

- Minutes
  - Approval of minutes (can be formal or informal)
  - Ensure they are posted and available
Meeting Time

- Chairman maintains order of agenda / describes procedural steps
- Applicant presentation
- Board input
  - Some follow formal presentation process, some are informal
- Q&A
Meeting Time

- Public input
  - When does it occur? (before meeting, after application, end of meeting)
  - Is it Public Hearing? (more formal process; different notification requirements)
  - How are board and applicant allowed to engage with public?
  - Limitations on speaking (limit time, request a spokesman to speak)
  - How do you respond? (direct interaction, formal response, applicant)
Meeting Time

- Actions
  - Prepared resolutions for approval or denial
  - Motions made by board members
  - Recommendations/ referrals to other boards

- Different procedures
  - Site plan, subdivision, special use permit
  - Helps to have your municipal attorney present

- Other items of interest
  - Updates on projects and planning efforts

- Meeting adjournment
POST MEETING
POST MEETING

- Chairman signature on approved plan / resolution
- Approved materials in record
- Was there an approval with conditions?
  - Written conditions for applicant and building department
- Was there a denial?
  - Written reasoning for denial on record
- Someone to guide process
  - Follow up with applicant on actions/ outstanding items
**IN PRACTICE**

- Complete Application Submitted
  - Application
  - Site Plans
  - SEQRA forms

- Board Packets Distributed
  - Staff comments

- What now?
In Summary

Success
Just Ahead
IN SUMMARY...

- **Be Prepared**
  - Review Application Materials
  - Site Visit
  - Understand Review Requirements
  - Role of Board in Review
  - Ask Questions of Staff in Advance

- **Be Respectful**
  - All parties

- **Be Clear**
  - Additional Information Needed
  - Next Steps
Thank You

Contact Information:

- Jaclyn Hakes, AICP
  jhakes@mjels.com
  (518) 371-0799

- Joel Bianchi, PE
  jbianchi@mjels.com
  (518) 371-0799