PLAN MAKING AND IMPLEMENTATION

Sacramento Valley Section
AICP Prep
May and November 2020 Exams
Topics Covered

- Conducting Research
- Spatial Analysis
- Public Engagement
- Communication
- Preparing a Plan
- Land Use and Development Regulations
- Monitoring and Assessment
- Project/Program Management
- Social Justice
Overview

What is a Comprehensive Plan?

• A clear vision for the future and actions to achieve it
• The official statement, adopted by a legislative body, which sets forth its major policies concerning desirable future physical development
• Key components/elements:
  – Demographics
  – Land Use
  – Transportation
  – Community Facilities
  – Infrastructure
Overview

The basic plan making steps

• Identify audience/stakeholders
• Define and identify problem(s)
• Gather and analyze information
• Develop alternatives/evaluate impacts
• Select a desired alternative
• Develop budget and implementation strategy
• Evaluate and amend (if necessary)
Conducting Research

- **Demographics:** three major components of demographic analysis:
  - Fertility
  - Mortality
  - Migration
Conducting Research

Types of Descriptive Statistics

• Percentiles (divided into 100 parts)
• Quartiles (divided into 4 parts)
• Measures of Central Tendency
  – Mean (regular meaning of "average")
  – Median (middle value)
  – Mode (most often value)
• Measures of Dispersion of Variability
  – Range (extent of the values)
  – Standard Deviation (measure of how spread out numbers are)
  – Variance (the average of the squared differences from the Mean)
Types of Descriptive Statistics

• Measures of distribution shape
  – Skewness
  – Kurtosis (thickness of the tails)

positively skewed (right longer than left)

negatively skewed (left longer than right)
Conducting Research

Three basic types of demographic analysis

• **Descriptive**: tools, data and methods to describe the population of an area

• **Trends**: look at how demographic data has changed over time

• **Projections**: estimates of future population and population structure
Conducting Research

• **Targets:** express desirable future populations based on policies and goals

• **Estimates:** measure of a present or past condition that cannot be measured directly because of a lack of resources (data, time, money)

• **Projections:** conditional statement about the future, describing what the future is likely to be if a given set of assumptions proves to be true

• **Forecasts:** conditional statement about the future, describing what the future is likely to be; typically based on statistical models, but reflecting and incorporating the decisions and judgment of the analyst with respect to various factors
Spatial Analysis

- **GIS (Geographic Information System):** computer software used to display multiple layers of information about a geographic location

- **Illustrative Diagrams:** mapping and diagrams designed to convey ideas in easy to understand formats
Public Engagement

Arnstein Ladder of Citizenship Participation

- Citizen Control
- Delegated Power
- Partnership
- Placation
- Consultation
- Informing
- Therapy
- Manipulation

Interactive Exercises

- Charrettes

"Hands On" Activities

“Hands On” Activities
Communications

Development Activity in the District of Columbia 2010–2012

Development activity includes new construction and renovation projects with a construction value of over $5 million.


Housing Units

- 1,988 renovation
- 4,937 new construction

Hotel Rooms

- 1,970 renovation
- 204 new construction

Commercial and Institutional (square feet)

- Office: 2,923,940 renovation, 4,417,665 new construction
- Retail: 256,443 renovation, 684,094 new construction
- Medical Office: 97,000 renovation, 642,190 new construction
- Education/Public/Institutional: 1,684,981 renovation, 1,495,413 new construction
Communications

Downtown Colorado Springs Vision
Welcoming | Vibrant | Connected | Walkable | Anchored | Innovative | Entrepreneurs! | Valued

Goals

GOAL 1
Economic and Cultural Heart of the Region

GOAL 2
A Place for Inspiration, Honoring History and Facing the Future

GOAL 3
Celebrating and Connecting with Outdoor Recreation and Exceptional Natural Setting

GOAL 4
A Place for Healthy and Active Lifestyles

GOAL 5
A Walkable and Bike-Friendly Center Connected Through Safe and Accessible Multimodal Networks

GOAL 6
A Leader In Innovative Urban Design and Sustainability

GOAL 7
Offering an Unforgettable Visitor Experience

GOAL 8
Diverse and Inclusive Places to Live, Integrated with Adjacent Neighborhoods

Action Steps

Volume 1
PLAN OF DEVELOPMENT
The Development Plan serves as the official plan of development for the Downtown Development Authority, outlining the goals and actions that will move Downtown toward achieving its vision.

Chapter 1: Assets, Opportunities, and Challenges
Chapter 2: Vision Framework
Chapter 3: Boundary Description
Chapter 4: Tax Increment Financing

Volume 2
MASTER PLAN
The Experience Downtown Master Plan is designed to fulfill Downtown’s long-term Vision and Goals through key physical elements that define its desired character and function.

Land Use Chapter
Chapter 1: Parks, Trails and Waterways
Chapter 2: Gateways and Districts
Chapter 3: Transportation, Mobility and Parking
Chapter 4: Urban Design and Public Space

Figure 1.5 | Catalytic Development Sites
Preparing a Plan

Vision

• Statement of where the community desires to go
• A key element of any comprehensive plan

A Vision for Cupertino

Cupertino aspires to be a balanced community with quiet and attractive residential neighborhoods; exemplary parks and schools; accessible open space areas, hillsides and creeks; and a vibrant, mixed-use “Heart of the City.” Cupertino will be safe, friendly, healthy, connected, walkable, bikeable and inclusive for all residents and workers, with ample places and opportunities for people to interact, recreate, innovate and collaborate.

CAMPUS VISION
Saint Mary’s College of California is anchored by a beautiful, walkable and sustainable campus nestled in the Moraga foothills. The Chapel is a focal point of the campus and represents the College’s Catholic heritage. Intimate gathering spaces, plazas and arcades foster interaction among Brothers, faculty, staff and students. Attractive, aesthetically unified buildings, residences, and recreation facilities meet the needs of the College community.

Academic buildings, including offices, classrooms and laboratories are contemporary, technologically enhanced, and flexible to inspire discovery, creativity, reflection, and collaboration.

Combined, the Campus’s buildings, spaces and places reflect the College’s Catholic, Lasallian and liberal arts foundation, and support the dynamic and challenging academic programs that make Saint Mary’s College of California the West’s leading Catholic university.
Preparing a Plan

- **Goal**: value-based statement, not necessary measurable; should include purpose, scope and context
- **Objective**: more specific, measurable statement of a desired end; should include location, character, and timing
- **Policy**: rule or course of action that indicates how the goals and/or objectives of the plan should be realized; should include principles, agreements, laws, regulations and resolutions
- **Program/Action**: series of related, mission-orientated activities aimed at carrying out a particular goal or policy; should include initiatives, projects, milestones, costs and responsibilities
Preparing a Plan

- **Figures and Graphics:** spatially and visually convey information that helps further describe goals or policy.
Preparing a Plan

- Organizing and Reporting Data: know terms such as Gantt Chart, Bubble Chart, Flow Chart, matrix, etc.

Gantt Chart

Flow Chart

Wonderful New Widget

Matrix
Types of Development: greenfield, leapfrog, redevelopment, infill, brownfield/grayfield, TOD, mixed-use

Zoning Ordinance: Map and text that regulates uses, density, area and bulk. Typically includes definitions, general provisions, district regulations, special development standards, administration and enforcement. Specific approaches include Euclidean, cumulative, form-based, performance and spot

Subdivision and Land Development Ordinance (SLDO) Process and procedures (sketch plan, preliminary plan, final plat) that includes design and construction standard
Land Use and Development Regulations

• **Tools within Zoning/SLDO:**
  – Agricultural/Environmental Preservation Zoning
  – Density Bonuses
  – Conservation Subdivision
  – Transfer of Development Rights (TDR)
  – Exactions (improvement or dedication of land, fees in lieu, impact fees)
  – Impact Analysis (environmental, historic, transportation, fiscal)

• **Other Codes:**
  – Building Codes/Housing Code/Standards
  – Erosion, Sedimentation and Stormwater Management
Land Use and Development Regulations

• Plan and Project Review
  – Site specific
  – Existing conditions (natural and built)
  – Regulation at various levels of government
  – Local government planner is the technical resource
  – Process: due process for all parties, all parties can be heard, plans available for inspection and review, appeal process for decisions

• APA Policy Guides: Impact Fees, Smart Growth, Agricultural Lands Preservation, Sustainability
Land Use and Development Regulations

Growth Management
• Methodologies and Techniques
• Comprehensive Planning & Regulations
• Urban Growth Boundary
• Infrastructure Planning & Funding
• Environmental Regulations
• Annexation
• Extraterritorial Jurisdiction (ETJ)
Monitoring and Assessment

Methods

• Implementation Plans
• Quantifiable targets
• Regular monitoring, reporting and adjustments
Monitoring and Assessment

Types of Budgets
- Line Item Budgets
- Performance Budgets

Budgeting Process
- Financial Analysis and Policy Choices
- Expenditure Estimates
- Review of Expenditure Estimates
- Revenue Estimates
- Budgeting Forecasting
- Budget Document
- Budget Review and Adoption
- Budget Execution
Monitoring and Assessment

Public Financing Tools

- Current revenues – cash
- Revenue funds/fees
- State and Federal grants
- Revenue bonds
- General obligation bonds
- Special Taxing Authorities
- Special assessments
- User fees
- Tax Increment Financing
Monitoring and Assessment

Capital Improvements

- Types of Projects
  - Streets
  - Water
  - Sewer
  - Parks
  - Public facilities
  - Drainage
Project/Program Management

- Coordination and communication
- Scheduling tools
Social Justice

- Planning for diverse or underserved communities
- Social empowerment
- Environmental justice

*Study current AICP Code of Ethics*
a. prosperous

Recent new investments have created energy along Hawthorne Boulevard.

Actively supporting existing businesses will strengthen the local economy.

A1. Shopping and Dining Destination Goal

To create a business-friendly environment and expand retail, service and dining opportunities in order to support existing business, while also attracting new businesses and investment in Downtown Hawthorne.

Why It’s Important

Supporting local businesses, and fostering the creation of new business opportunities, will create a vibrant shopping and dining destination in Downtown Hawthorne. New developments will offer a greater variety of employment, retail and entertainment options that will enhance the quality of life for residents and workers. Attracting new businesses that cater to regional retail needs will establish Downtown as a destination for visitors. Additionally, implementing and publicizing a series of business-friendly strategies will assist in the creation of a stable and predictable regulatory environment for new businesses and real estate developers. These strategies will ultimately help strengthen and diversify Hawthorne’s economy and the City’s tax base.

Strategies

A1.A Form a Business Improvement District to allow local business and property owners to organize, pursue and fund shared goals, such as marketing programs or certain streetscape improvements.

A1.B Implement a Facade Improvement Program to encourage property owner investment in and revitalization of existing building stock, particularly along Hawthorne Boulevard south of El Segundo.

A1.C Facilitate connections between local business owners and small business loan and loan guarantee programs.

A1.D Offer Spanish-language assistance and outreach to Hispanic business owners.

A1.E Continue the City’s Guardian Angel program to streamline permit processing for new businesses, and expand the program to assist in permit processing for existing businesses.