

PHED COMMITTEE #1
April 7, 2008

MEMORANDUM

April 4, 2008

TO: Planning, Housing, and Economic Development (PHED) Committee
FROM: Marlene L. Michaelson, ^{MM} Senior Legislative Analyst
SUBJECT: Briefing on Master Plan Process Reassessment

The Committee will receive a briefing on the Department's report on their six-month effort to "examine opportunities to improve the process by which it develops master plans, improve their content to enhance readability and conceptual clarity, and strengthen implementation". A cover memorandum from Planning Department staff is attached at © 1 to 15. This is followed by the reports of the consultants hired to assist with this effort.

The beginning of the Planning Department memorandum focuses on the need to create a new hierarchy of master plans to better respond to the need for more targeted small area reviews (particularly important for areas experiencing redevelopment) and limited master plan amendments that focus on a few issues and can be produced in a very short period of time. These proposed changes are discussed further in the 9 recommendations presented in the Planning Department staff report to the Planning Board, each of which is addressed below.

Recommendation 1: For the majority of planning efforts, plan area boundaries should be narrowed to focus on clearly-defined, smaller geographic areas where significant land use changes are anticipated or desired – i.e., small area or neighborhood plans (see © 7).

Staff agrees that plans with smaller geographic areas will allow the Planning Department to focus on those areas undergoing the most significant change and will allow them to assess the area and prepare plans more rapidly. While there will still be some need for traditional master plans, the likely future focus on infill and redevelopment, instead of large undeveloped tracts of land, leads Staff to agree that this is the right approach. Staff also concurs with the consultant recommendation that the shift to smaller target areas will require an accompanying shift in the

County's planning approach and the ability to "quickly hone in on a more focused and targeted set of planning issues."

Recommendation 2: For small area master plans with clearly defined, smaller geographic boundaries, the time frame for completion should be 18 to 24 months – from inception through Council approval of the Final Draft Plan (see © 8).

Staff agrees that a shortened time frame is appropriate, but would recommend that the Department concentrate on the time period over which they have control: between initiation and Planning Board approval. One of the consultant recommendations that will help to shorten the time frame would be to have a far more targeted and streamlined data collection effort at the beginning of the process.

Recommendation 3: Limited Master Plan Amendments, which focus on a very small area where there is an immediate planning concern, may be undertaken once or twice a year; however, they should be infrequent so as not to disrupt the regular master plan program (see © 9).

Limited master plan amendments, which focus on limited land use or zoning issues are needed when a specific issue arises that does not warrant a full master plan review. The Department recommends retaining capacity to undertake one or two of these limited master plan amendments and developing criteria to assess whether an issue presents an appropriate opportunity for a limited master plan amendment. Staff supports the recommendations.

Recommendation 4: The Department should improve the processes related to developing all types of master plans by focusing on standardization plan development and content (see © 10).

Staff strongly supports this recommendation to standardize both the process for developing a master plan and the product. The Planning Department report recommends that the Department "develop a standardized procedure template for all Master Plans that provides greater structure to streamline processes and administrative plan elements, efficiently allocate resources, and improve communication with the Board." Staff believes it would be helpful to develop a prototype as soon as feasible. Staff also supports the consultant recommendations to improve the product (clear document structure, attractive and easy to read page layout, ample use of graphics, etc.) and to consider different versions of the final product to meet the needs of different audiences (e.g., a short brochure for a general audience [1 to 10 pages or in poster form], a short plan [approximately 50 pages] for a more interested citizen audience, and a detailed on-line, searchable version with all the data routinely used by government staff, but not necessary of interest to most master plan readers [e.g., the right-of-way width charts, background environmental data, etc.]).

Recommendation 5: To shorten the time for development of all master plans, the Department should eliminate the Staff Draft (see © 11).

The Staff Draft is the culmination of the work of the professional planning staff, and Staff is concerned about the proposal to eliminate this work product. It is not unusual for the Planning Board Draft to differ significantly from the Staff Draft, sometimes for very good reasons, resulting in a far improved plan. At times the Planning Board has made a different determination than the staff on the tradeoff between competing policy objectives (e.g. affordable housing and protection of the environment). Having the two drafts provides a basis for assessing the tradeoffs. For example, in the Damascus Master Plan a three-member majority of the Board did not agree with the Staff's recommendation to limit housing on various sites due to environmental constraints. The Council ultimately agreed with the minority and staff on most properties. This would have been far more difficult without a Staff Draft as a reference point. Finally, Staff notes that there have been some Planning Boards (but, of course, not the current one) that have inappropriately injected political considerations into their review (in fact, some Planning Board members have been candidates for public office at the same time they served on the Planning Board). Once again, the Staff Draft provided a basis for highlighting differences between the Board and staff.

Similarly, Staff is concerned about the recommendation to involve the Planning Board in the development of the initial draft, potentially influencing the development of what should be objective, professional recommendations. Staff believes the Planning Board should be briefed regularly on issues related to the scope and schedule and apprised of major issues, and should have the ability to consider the quality of the analysis (is it thorough, have the staff given adequate attention to all relevant issues, etc.). However, in Staff's opinion, they should not be given the opportunity to shape the recommendations at this point in the process. (They will have ample opportunity to change any recommendation in the Planning Board Draft.)

Recommendation 6: Eliminate the 60-Day Executive Review Period (see © 11).

The memorandum suggests eliminating the Executive's fiscal review due to the "growing economic expertise within the Department, and with heightened collaboration between M-NCPPC and County Executive agencies". Staff does not object to having the Executive review be conducted simultaneously with the preparation of the Planning Board Draft (provided that the Planning Department is obligated to provide the needed information in a timely manner). However, Staff believes that it would be inefficient and a poor use of resources to train Planning Department staff to develop the same expertise that already exists in the Executive Branch. Moreover, Staff is not convinced that Planning Department staff, even with training, will be able to estimate the cost of public facilities as well as those who build the facilities. The current process draws from the expertise in multiple Executive departments to estimate the costs of build out (library staff estimate the cost of a new library; recreation staff estimate the cost of a new recreation center, etc.).

The Executive analysis has not typically included estimates of the likely revenue to be generated from future residents and businesses at build out. If the Council believes this would be useful, Staff believes that Executive Staff in the County's Finance Department would be better equipped to generate these estimates than Planning Department Staff.

Recommendation 7: Create larger planning teams within the Community-Based Planning Division that are focused on fewer geographic areas. This should include assigning a lead planner with access to sufficient resources to ensure plan delivery, including outreach support, graphics, administrative support, and legal advice (see © 12).

Staff supports this recommendation and believes that the existing structure with multiple geographic teams has not provided the appropriate flexibility to shift resources to the most important master plan efforts. Moreover, it limits the Department's ability to provide a fresh perspective on the planning issues that face a particular area. Staff agrees that larger teams would "add efficiency and flexibility, providing more staff resources to address unforeseen problems while also creating larger teams that will have a wider geographic perspective, facilitating understanding of planning issues for a greater number of communities." Staff believes that it would be helpful to continue to have one planner assigned to be an expert on each of many limited geographic regions to provide input on master plans, as well as regulatory matters.

Staff also supports the concept of having a lead planner, who can also serve as a project manager.

Recommendation 8: Enhance staff skills, including greater training in principles of sound project management for senior staff, and in technical training for junior and mid-level staff (see © 8).

Staff thoroughly concurs and believes the agency must place a much greater emphasis on project management and ensure that employees are capable of using the most up-to-date technologies and tools (e.g., GIS and 3-D modeling). Staff believes the Department must also determine how they will judge whether the training and efforts to improve project management are successful.

Recommendation 9: Improve plan implementation through expanded regulatory tools, improved coordination with Executive Agencies, enhancement of planning staff skills to support implementation, and closer monitoring of plan results (see © 14).

Staff generally concurs (and particularly agrees that improved coordination with Executive departments is needed), but notes that some of the dissatisfaction that residents feel about plan implementation stems from a lack of understanding that plans are meant to guide development over a long period of time. Often there is an assumption by planners and decision makers that an area will not develop for many years at the same time that there is an expectation by residents that plan recommendations (particularly for new public facilities) will be implemented in the near-term.

Some of the comments in the Planning Department Staff memorandum raise questions as to whether the Department no longer sees master plans as long term visions to guide development of an area, but instead believes that master plans should evolve to focus on shorter term development horizons. For example, they note the level of detail required in master plans if the County is to adopt form-based codes. However, some cited elements of form-based codes make no sense if one assumes a long term build-out (e.g., it would be problematic to specify building

materials if you do not believe construction is likely to occur for 20 years, since state of the art building materials are likely to change over a 20-year period). These issues must be addressed as the Planning Department works on its Zoning Ordinance Rewrite.

Outreach

The consultants report raises a number of interesting observations related to outreach, and Staff believes that the Planning Department should clarify its overall approach to outreach while recognizing that each area may require a slightly different approach. The need to balance the goals of maximizing public input and producing plans in a timely manner can conflict and Staff believes that the consultant has provided some observations and recommendations that should be considered as the Department refines its master plan process. Staff continues to support the Department's efforts to move away from Citizens Advisory Committees with limited membership to broader outreach efforts that provide greater community representation. This is consistent with the consultant's recommendation to expand the pool of stakeholders involved in the planning process. The consultant also noted that the Planning Department's outreach efforts do not reflect the use of any of the widely-applied graphic techniques used by many other jurisdictions (e.g., 2- and 3-dimensional visualizations of concepts, animations such as walk-throughs and fly-overs, and before and after simulations, cross-sections and elevations). Technology is also not used to the extent possible to inform people about meetings and to share materials regarding the planning effort.