

Comprehensive Planning

A Division of New York Department of State

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Statutory definition

- Expression of municipality's goals and recommended action to achieve those goals
- Outline for orderly growth, providing continued guidance for decision-making
- Document focusing on immediate and long-range protection, enhancement, growth and development
 - Town Law §272-a
 - Village Law §7-722
 - City Law §28-a

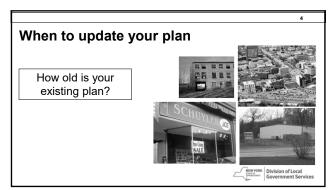


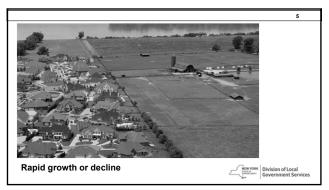
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Reasons for importance

- Zoning and other land use regulations must be in accordance with plan
 - Defense against spot zoning challenges
- Other government agencies shall consider town's plan while proposing capital projects
- Annual budget and capital plan
- Grant applications
- Growth management and prioritization
 - NYS Public Infrastructure Policy Act, 2010

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Community resilience

"The ability of a system to withstand shocks and stresses while still maintaining its essential functions."



Resilient Communities:

- Are familiar with their natural hazards
- · Are prepared for them
- · Recover quickly when they occur



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Resilience planning Considers multiple systems to create vital communities: Economic · A holistic approach New neighborhoods and relocations · Infrastructure modification and backup

Expand, conserve or revitalize natural protective features:

- Storm damage benefitsEnvironmental benefits
- Quality of life benefits for residents and visitors

Community Resilience Ecological

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NYS DEC Climate Smart Program

Climate Smart Communities (CSCs) engage in reducing greenhouse gas emissions and improving climate resilience

- Improving climate resilience

 1. Pledge to be a Climate Smart Community
 2. Set goals, inventory emissions, plan for climate action
 3. Decrease community energy use
 4. Increase community use of renewable energy
 5. Realize benefits of recycling and other climate-smart solid waste management practices
 6. Reduce greenhouse gas emissions through use of climate-smart and-use tools
 7. Enhance community realisance and prepare for the effects of climate-smart and-use tools
 9. Inform and inspire the public
 10. Commit to an evolving process of climate action obvision of New York Department of State

Adopt or revise land-use plans & regulations to minimize impact of new development:

- · Smart Growth Principals
- Resource-efficient site design guidelines
- Green parking lot standards
- Complete streets & alternative transportation options
- · Green building codes



Planning board's role - drafting

- A. Entire planning board drafts plan
- Independent 'special board' with at least one planning board member drafts plan
- Local governing board drafts plan and accepts recommendations from planning board
- Board preparing plan must hold public hearing
- Planning board or 'special board' may not adopt plan





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Governing board's role - adoption

- · Passage of local enactment by governing board needed to implement or amend plan
- Hold public hearing within 90 days of receiving draft plan
- · Governing board also responsible for:
 - Amending land use regulations
 - Developing design guidelines
 - Budgeting for capital improvements
 - Applying for appropriate state, federal and privately funded programs



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Public's role - participation

- · Public hearings
- Informing the public

 Open meetings

 Local news media

 - Access to materials
- Involving public

 - SurveysInformational sessions
 - Ongoing outreach
 - Design charrette



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Getting started

Governing Board determines body responsible for plan preparation

- · Create a budget
- Refer to your current plan (if one exists)
- · Review comprehensive plan statute

General City Law § 28-a Town Law § 272-a Village Law § 7-722 Possible Leaders:

- Governing Board Planning Board Special Board
- Sources of Assistance:
- County planning department
 Consultant
 Others:
 College students
 Retired workers
 Retired workers
 Municipal employees
 Resident experts

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Identify community stakeholders

- · Business owners
- · Civic leaders
- · Elected officials
- · Environmental experts
- · Planning Board and ZBA



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Who will draft the plan?

- Comprehensive Plan Committee
- Municipal planner
- Municipal engineer
- Municipal attorney
- County planners
- Planning consultantNot-for-profit consultant
- Combination of the above



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Using a consultant

· Role in plan preparation varies

- Interview and check references
- · Identify staff assigned to plan
- · Consider relevance of their experience
- Identify any subcontractors

Consultants may provide an unbiased community view



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Process at a glance

- 1. Identify issues
- 2. Survey
- 3. List goals
- 4. Prepare plan
- 5. Consider alternatives
- 6. Adopt plan
- 7. Implement plan
- 8. Evaluate plan



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Step 1: Identify issues

What are your SWOTs?

- Strengths
- Weaknesses
- Opportunities
- Threats

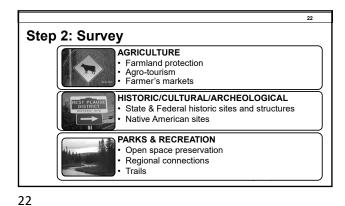












Step 2: Survey (cont'd) ENVIRONMENT Natural features Water resources Endangered species Minerals, soils Wind Gases DEMOGRAPHICS Seasonal residents Seniors Immigrants
Household Income School aged children College students HOUSING Styles/types Number of units Vacancy rates Age Quality Value

Survey **ECONOMY** Retail Leakage Regional Employment Local Industry Economic trends Tourism PUBLIC SERVICES services Schools Civic Centers Fire/police/hospitals Senior services Water/sewer Libraries TRANSPORTATION Streets/roads RR/airports Public transit Sidewalks Parking Bicycle lanes

Step 3: Identify goals

- Based on identified issues (SWOTs)
- Goals become priorities for future policy development decisions
- Goals are measurable and achievable



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Town of Ledyard's goals

Farmland protection

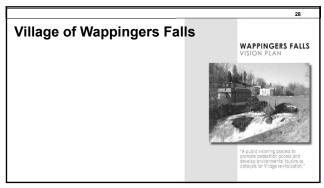


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Ledyard's recommended actions

- Ag zoning district to support farming
- Subdivision law to reduce impacts of development on farm operations/active farmland
- Maintain lower property taxes for farmlands
- Site infrastructure away from farmland





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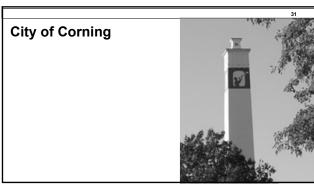


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Wappingers Falls' recommended actions

- Central business district revitalization
- Streetscape improvements
- Walkability/readability
- Park and open space improvements





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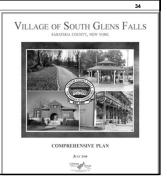
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Corning: actions

- Consolidate scattered public safety services into one complex
- Use GIS to track service delivery
- Hire an additional Code Enforcement Officer to handle residential units inspection
 - Largely self-supporting, paid for by fees charged for each inspection

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Village of South Glens Falls



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South Glens Falls' goals

- Provide affordable and accessible housing options
- Promote new construction in harmony with existing neighborhoods





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South Glens Falls' recommended actions

- · Update zoning:
 - Senior housing and assisted living facilities by allowed by SUP
 Allow accessory and in-law apartments
- Create walkable and connected neighborhoods:
 - Link new housing to existing residential and commercial areas with access roads, sidewalks and trails



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|--|-----------|-----------|------------|--------------|--|--|--|
| Historical financial results: Village of Arkport, General Fund | | | | | | | |
| Revenues | 2010 | 2012 | 2014 | Av. Increase | | | |
| Real Property Taxes | 152,388 | 156,632 | 162,623 | 2% | | | |
| Other Real Property Tax Items | 16,127 | 16,219 | 16,523 | 1% | | | |
| Sales and Use Tax | 103,506 | 115,975 | 110,447 | 2% | | | |
| Charges for Services | 14,604 | 14,656 | 14,104 | -1% | | | |
| State Aid | 29,275 | 24,052 | 24,287 | -5% | | | |
| Other Local Revenues | 22,689 | 733 | 0 | -100% | | | |
| Use and Sale of Property | 15,582 | 11,186 | 31,449 | 19% | | | |
| Total Revenues and Other Sources | \$354,171 | \$340,103 | \$360,083 | | | | |
| Expenditures | | | | | | | |
| General Government | 101,014 | 110,050 | 108,025 | 2% | | | |
| Public Safety | 6,818 | 6,011 | 7,805 | 3% | | | |
| Health | 300 | 300 | 300 | 0% | | | |
| Transportation | 76,912 | 70,620 | 129,903 | 14% | | | |
| Economic Development | 11,500 | 0 | 2,750 | -30% | | | |
| Culture and Recreation | 18,171 | 25,622 | 21,354 | 4% | | | |
| Sanitation | 960 | 982 | 1,066 | 3% | | | |
| Other Community Services | 15,877 | 17,496 | 19,620 | 5% | | | |
| Debt Service (Principal and Interest) | 0 | 0 | 47,687 | N/A | | | |
| Employee Benefits | 17,002 | 38,803 | 52,448 | 33% | | | |
| Total Expenditures and Other Uses | \$248,554 | \$269,884 | \$390,958 | 12% | | | |
| Surplus (Deficit) | \$105,617 | \$70,219 | (\$30,875) | | | | |

| | | | | 39 |
|-----------------------------------|---------------------|------------|-------------|--------|
| Projected results: Village of A | rkport, General Fun | d | | |
| evenues | 2015 | 2017 | 2019 | Change |
| Real Property Taxes | 165,287 | 170,748 | 176,389 | 2 |
| Other Real Property Tax Items | 16,624 | 16,826 | 17,032 | 1 |
| Sales and Use Tax | 112,254 | 115,957 | 119,781 | 2 |
| Charges for Services | 13,982 | 13,740 | 13,503 | -1 |
| State Aid | 23,179 | 21,112 | 19,230 | -5 |
| Use and Sale of Property | 37,485 | 53,253 | 75,655 | 19 |
| Total Revenues and Other Sources | \$368,810 | \$391,636 | \$421,589 | 4 |
| xpenditures | | | | |
| General Government | 109,853 | 113,601 | 117,477 | 2 |
| Public Safety | 8,073 | 8,638 | 9,242 | 3 |
| Health | 300 | 300 | 300 | 0 |
| Transportation | 148,090 | 192,459 | 250,121 | 14 |
| Economic Development | 1,923 | 940 | 460 | -30 |
| Culture and Recreation | 22,233 | 24,102 | 26,128 | 4 |
| Sanitation | 1,094 | 1,153 | 1,215 | 3 |
| Other Community Services | 20,686 | 22,996 | 25,563 | 5 |
| Employee Benefits | 69,508 | 122,082 | 214,420 | 33 |
| Total Expenditures and Other Uses | \$381,761 | \$486,271 | \$644,926 | 16 |
| urplus (Deficit) | (\$12.951) | (\$94,634) | (\$223,337) | |

Increase tax base or increase levy?

Sprawl is more expensive than infill development

- Attract businesses to increase tax base
- · Increased levies are hard for taxpayers





Bridging the financial divide

- Utilize reserves (not sustainable)
- Raise revenues (increase tax base or tax levy)
- · Reduce expenditures
 - Reduce staff (impacts service delivery, employee morale)
 Scale back or eliminate services (voter backlash)
- · Share services



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|---------------------------------------|-------------------|------------|------------|-----------|
| Revised Projection: Village | e of Arkport, Gen | eral Fund | | |
| levenues | 2015 | 2017 | 2019 | change |
| Real Property Taxes | 165,100 | 167,615 | 172,760 | 29 -39 |
| Other Real Property Tax Items | 16,038 | 15,567 | 14,667 | -39 |
| Sales and Use Tax | 87,048 | 68,606 | 42,616 | -219 |
| Charges for Services | 7,450 | 3,935 | 1,098 | -479 |
| Charges to Other Governments | 450 | 312 | 149 | -319 |
| State Aid | 27,660 | 31,501 | 40,859 | 149 |
| Federal Aid | | | | |
| Use and Sale of Property | 11,450 | 44,679 | 63,473 | 199 |
| Total Revenues and Other Sources | \$315,196 | \$332,215 | \$335,622 | 15 |
| xpenditures | | | | |
| General Government | 106,288 | 104,579 | 101,243 | -29 |
| Public Safety | 6,805 | 5,933 | 4,510 | -13 |
| Health | 300 | 300 | 300 | 01 |
| Transportation | 121,137 | 112,963 | 98,231 | -79 |
| Economic Development | 400 | 58 | 1 | -859 |
| Culture and Recreation | 28,671 | 38,495 | 69,396 | 349 |
| Sanitation | 1,200 | 1,351 | 1,712 | 135 |
| Other Community Services | 25,907 | 34,209 | 59,645 | 329 |
| Debt Service (Principal and Interest) | 21,658 | 9,836 | 2,029 | -559 |
| Employee Benefits | 47,921 | 43,785 | 36,552 | -99 |
| Contingent Appropriations | 11,549 | | | |
| Total Expenditures and Other Uses | \$371,836 | \$351,509 | \$373,619 | 55 |
| urnlus (Deficit) | (\$56,640) | (\$19.294) | (\$37.997) | |

Revised Projection: expenditures

| | 2015 | 2017 | 2019 | Change |
|-------------------|---------|---------|---------|--------|
| General | | | | |
| Government | 106,288 | 104,579 | 101,243 | -2% |
| Transportation | 121,137 | 112,963 | 98,231 | -7% |
| Employee Benefits | 47,921 | 43,785 | 36,552 | -9% |

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Incorporate into plan

How can you incorporate paying for development into your plan?

- "Fix it First" strategies
- Infill development and revitalization
- · Phased growth



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Consider other plans

- County farmland protection plans
- Coastal resource plans
- State open space plan
- County economic development plan
- Neighboring municipalities
- DOT regional office
- School district
- · Canal recreationway plan



plan

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Sample table of contents

- 1. Introduction and/or executive summary
- 2. Existing conditions
- 3. Trends
- 4. Environmental framework
- 5. Development goals & policies
- 6. Land use constraints & opportunities
- Land use constraints & opportunities
 Land use development plan
- Fiscal impacts
- 9. Implementation strategies
- 10. Maps
- Appendices (Surveys, public meeting notes/ summaries, regulations, design guidelines, budgets for capital improvements, grant applications)



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Step 4: Draft plan

When do you have enough research to begin writing?

- · Primary concerns are addressed
- Public meetings held (statutorily required and others)
 - All Special Board meetings are open to the public
- · Monitor consultant's progress
 - Review work early to ensure consistency with community's vision



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Parallel reviews

- · County planning
- Agricultural
 - If necessary
- SEQRA



Hold at least one public hearing during plan preparation

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County planning agency review

- · Governing Board must refer plan to County PB for review
- County review looks for county-wide or inter-municipal impacts
- GML §239-m

Local actions can affect regional growth



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Agricultural review

Agriculture & Markets Law

- Plan is subject to requirements
 Article 25-AA (§305a)
- Also consider county agriculture & farmland protection plans created under
 Article 25-AAA



See DOS publication "Local Laws and Agricultural Districts: How do they Relate?"

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State Environmental Quality Review (SEQR)

- Plan adoption is "Type I Action"
 Potential significant adverse environmental impact presumed
- · Full EAF required
- EIS may be required
- May serve as Generic EIS
- Include thresholds and conditions triggering site specific EIS



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Step 5: Evaluate alternatives

· Are goals achievable financially?

- Are there more attainable/sustainable alternatives?
- What are cost effective ways to achieve goals?

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Step 6: Adopt plan

- Governing Board adopts plan by resolution or other local enactment
- Adopted plan must be considered by other governmental agencies when planning for capital projects



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Step 7: Implement plan

Suggestions to promote concepts outlined in plan:

- · Amend land use regulations
- Develop design guidelines
- · Budget for capital improvements



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|--|---|---|---------------|--|---|--|
| Implementation matrix | | | | | | |
| Town of Copake Comprehensive Plan Implementation Matrix - July 6, 2011 | | | | | | |
| Goal/Catalysts/Actions | * | Z | Phase | Partners | Funding | |
| Encourage light industry, manufacturing and business parks which do not negatively impact the environment. | | | Ongoing | Town of Copake | No Cost | |
| Review the effectiveness of the floating industrial district. | | z | Short | Town of Copake, Plan- ning Board, Zoning Board, Zoning Update Committee | No Cost | |
| Limit development around Copake Lake to protect water quality and encourage historic preservation in Copake Falls. | | z | Short | Town of Copake, Zon- ing Committee | No Cost | |
| Support further development of the Rail Trail. | | | Short/Ongoing | Harlem Valley Rail Trail, Town of Copake | Town of Copake, Harlem Valley Rail Trail, NYS OPRHP | |
| Recognize Copake North as an area of significance. | | | Ongoing | Town of Copake | No Cost | |
| Explore provision of tax incentives to preserve historic resources. | | | Medium | Historical Society, Town of Copake | To Be Determined | |
| Encourage low-impact development and sustainable infrastructure where appropriate. | | z | Medium | Town of Copake, Plan- ning Board, Zoning Board, Zoning Update Committee | No Cost | |

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Step 8: Evaluate plan

Plan must include maximum intervals for review

- General City Law §28-a
- Town Law §272-a (10)
- Village Law §7-722 (10)

Plan should be updated to reflect changes to policies and physical characteristics of community

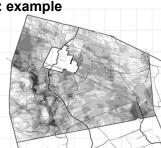
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Amendments to plan: example

Priorities for Protection

- · Water quality
- Agriculture
- Environmental sensitivity
- Geology
- · Scenic, historic



Funding sources

- NYS DOS Local Government Efficiency Grants (LGE)
- · NYS DOS Local Waterfront Revitalization Program
- NYS Smart Growth for designated geographic areas
- NYS Dept. of Agriculture & Markets funds up to \$25,000 for agricultural protection parts of comprehensive plans
- NYSHCR New York Main Street Technical Assistance
- NYSERDA Cleaner Greener Communities
- NYS DEC's Climate Smart Communities
- Metropolitan Planning Organizations (MPOs)
- · Citizens Empowerment Grant



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Resources

- "A Practical Guide to Comprehensive Planning," NY Planning Federation (2000), (518) 432-4094: www.nypf.org/publications.html
- · Pace Law School Land Use Law Center:
- www.law.pace.edu/landuse/landuse library.html
- New York Department of State: www.dos.state.ny.us/lgss/pdfs/zncompplan.pdf
- The Community Planning Website:
- www.communityplanning.net/index.html
- Design Charrette website: <u>www.charrettecenter.net</u>
- Planning Commissioners' Journal: www.plannersweb.com
 Rural Smart Growth Audit Tool, Madison County:
- Rural Smart Growth Audit Tool, Madison County: www2.epa.gov/sites/production/files/2015-07/documents/madison_county_sgia_071015.pdf

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Division of Local Government Services

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https://dos.ny.gov/training-assistance



An Introduction to Charrettes

by Bill Lennertz, Aarin Lutzenhiser, and Tamara Failor

Community members too often become frustrated by limited public participation opportunities when major projects are being proposed. This can come up with neighborhood or area revitalization plans; large-scale development proposals (especially when affecting residential areas) or master plans; new annexations; and similar situations.

People may attend public meetings with high hopes for the results, only to conclude that decisions are being made behind closed doors. This can result in apathetic sentiments like, "they're just going to do what they want whether or not I get involved."

At the same time, planning commissioners are often disappointed when large-scale, controversial projects or plans are presented to them at public hearings attended by crowds of angry residents complaining about having little prior input. The result can be contentious, time-consuming, and unproductive public hearings, and a hardening of antagonisms between the various parties.

THE CHARRETTE PROCESS

An important goal of a charrette is to bring decision makers and community

members together in one place to create a plan that represents a detailed, feasible agreement — a consensus which can otherwise take months to achieve.

The French word "charrette" literally means "cart" and is used to describe the final intense work effort expended by art and architecture students to meet a project deadline. At the École des Beaux Arts in Paris during the 19th century, proctors circulated carts to collect final drawings while the students frantically put finishing touches on their work. The charrettes that we at the National Charrette Institute teach combine this creative, intense design work session with a collaborative public workshop.

A charrette usually runs between four and seven days (depending on the complexity of the issues) and involves an intensive series of meetings and design sessions. This time compression facilitates creative problem solving by accelerating decision making and reducing unconstructive negotiation tactics. It also encourages people to abandon their usual working patterns and "think outside of the box."

We build into the charrette process a series of three major "feedback loops" where design ideas are created by a charrette design team based upon project constraints and a public vision, and then

re-presented within hours for

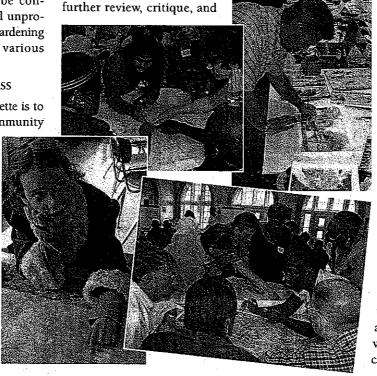
refinement. Regular stakeholder input and reviews quickly build trust in the process. These feedback cycles also foster a holistic understanding of complex problems by all participants, and form the basis of a plan that reflects all viewpoints.

The design team which organizes and runs the charrette is typically comprised of the project sponsor (e.g., the city planning agency, developer, and/or community group) and a multi-disciplinary team of professionals. This group is usually staffed, at a minimum, with planners, architects, landscape architects, transportation engineers, and economists. This team is usually comprised of consultants, sometimes augmented by agency staff.

A multi-disciplinary team is important in ensuring that the design work during each step of the charrette is realistic. To create a feasible plan, every deci-

> sion point must be fully informed, especially by the legal, financial, and engineering disciplines. The focus on feasibility brings a level of seriousness and rigor to the process for everyone involved.

An important objective of the charrette process is to identify areas of disagreement. During the charrette, the design team works to create design and planning solutions that resolve areas for which there may be no readily apparent solution. A well-run charrette reduces the potential for



An Introduction to Charettes

continued from previous page

surprise conflict arising late in the game.

Before a successful charrette can be held, there's need for preparation. This first phase of getting "charrette-ready" can last anywhere from six weeks to nine months. The second phase is the charrette itself. Following the charrette is the third phase, or plan implementation, which is required to ensure project

Phase One: Getting Charrette-Ready

Getting charrette-ready includes project set-up and organization, identification of project constraints and objectives, stakeholder involvement, information gathering, feasibility studies, and logistics planning.

Being "people-ready" means that the key stakeholders have agreed to participate in the charrette process, that there is a shared understanding of the nature of the project, and that everyone understands how the process will work and what their roles in it will be.

Being "information-ready" means that all the information required to make informed decisions during the charrette

is available. This is usually comprised of studies and analysis of existing conditions. The type of information and level of detail required varies with the project.

Outreach and engagement is key to the charrette preparation phase. To assure diverse and representative participation in the charrette, multiple outreach methods must be used. Some of these methods include: attending neighborhood meetings, engaging churches and organized groups, one-on-one meetings with key stakeholders, mailings, phone calls, e-mails, handbills, signs, websites, and newsletter announcements.

Stakeholders should include final decision makers, all people who will be affected by the outcome, people who have power to assist, and very importantly, people who can block a decision. The objectives of the various stakeholders are identified through meetings and inter-

Design is a powerful TOOL FOR ESTABLISHING A SHARED VISION.

process. However some jurisdictions recognize that those who conduct charrettes are being asked to spend additional time by going through another round of public hearings after the charrette. Baltimore County and Sarasota County allow developers an accelerated process with fewer public meetings if they do a charrette. In some cases the developers are also required to adhere to a higher standard of

come into question in charrettes. Although these laws vary from state to state; in most of the communities we've worked with public officials can attend and participate at chartettes, provided sions at the charrette. However, this is something you should check on with your city attorney beforehand to avoid any potential problems.

views before the charrette. Potential blockers must also be engaged early. Surprisingly often, they turn into the biggest project supporters.

The design team typically sets up a charrette studio at or near the project site. The studio is a complete temporary design/planning office and community meeting space. Close proximity to the site is important in order to make it easy for people to participate and for the design team to have quick access to the site. We've worked on charrettes where the studios have been located in places such as empty main street storefronts, community centers, high schools, or armories.

Residents, land owners, business owners, and representatives from community organizations, provide vision, input, and review throughout the charrette. This involvement is solicited through scheduled meetings, open public meetings, and by enabling individuals to simply drop by the charrette studio.

Phase Two: The Charrette

Charrettes generally range in length from four to seven days. The following describes a typical seven-day charrette schedule.

Day One of is all about sharing information. The charrette begins with an open public "hands-on" workshop where participants work in small groups to describe and draw their vision of what the place will look like ten or twenty years in the future after the project is complete. A community representative from each team presents their top ideas to the whole assembly. Everyone learns from each other's work and several alternative themes begin to emerge.

On Day Two and subsequent days, the design team works to develop plans based on the public's vision and the project objectives. The team meets with key stakeholders and develops concept alternatives. Design is a powerful tool for establishing a shared vision. Drawings illustrate the complexity of problems and can be used to resolve conflicts by proposing previously unexplored solutions that represent win/win outcomes.

The Planning Commission's Role in a Charrette Process

Planning commissioners can play a variety of roles in a charrette, ranging from leadership positions during the charrette to being active observers. At a minimum; a commissioner should participate in the charrette public meetings so as to be a fully informed about the project and the process. Contrast this with the conventional planning process where commissioners first see a plan when it is well along in the process

With a charrette, all stakeholders are involved from the beginning and throughout the design process. This approach fosters shared understanding and co authorship of planning decisions, which forms a solid foundation for project implementation

Most charrettes precede the formal project application and public hearings design guidelines. The question of "open meeting" laws and "ex parte" communications may they do not meet as a body to make deci-

PLAINNING COMMISSIONERS JOURNAL / NUMBER 71 / SUMMER 2008

On Day Three, the community is invited and encouraged to give their input on the developing designs while ideas are fresh. This is usually done through a public meeting or open house.

On Day Four, the design team synthesizes the input and narrows the number of alternatives, working toward the goal of a preferred plan.

On Day Five, the design studio opens to a mid-course public review of the ongoing work. This session is often the climax of the charrette. The remaining options are debated and then rated for their performance against the project objectives and public vision. The best features from each option are merged into a new solution. Often during these sessions, solutions to "unsolvable" problems are created. People are overheard leaving these sessions saying things such as, "now I see why alleys are important," or "I understand now how parallel parking contributes to walkability."

On Day Six, equipped with the information and input from the public open house, the charrette design team moves forward to investigate the final, preferred design in detail. Drawings at multiple scales are created and the project's performance is analyzed. Implementation strategies are also created.

On the final evening of the charrette, the design team presents all elements of the project including master plans, building designs, economic and transportation impacts and strategies, and the implementation plan. Everything needed to move the project forward is covered.

Phase Three: Implementation

Following the charrette, the design team analyzes and tests the plans. Addi-

tional stakeholder input is gathered. Final changes are made and the plans are presented to the public at a charrette follow-up meeting that occurs no more than one month later.

The goal of the plan implementation phase is to refine and finalize charrette products that will guide the project through adoption and development. It is important to maintain political leadership and support, keep community members informed and involved, and coordinate with approving agencies.

SUMMING UP:

Everyone involved in a community planning effort benefits from a process that is accelerated, well-planned, and productive. Charrettes provide a way of designing major or controversial projects and plans so they are more likely to be approved and implemented. This is the result of the stakeholder buy-in that comes from carefully structured, but creative, community collaboration.

Bill Lennertz, AIA, Executive Director of the National Charrette Institute, is a leading NCI charrette facilitator and practicing New Urbanist. First as Director of the Duany Plater-Zyberk & Company Boston office in 1986, and from 1993-2002, as a partner with Lennertz Coyle & Associates, Lennertz has directed over 150 charrettes.

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) H

How Much Does a Charrette Cost?

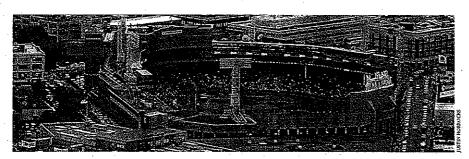
The charrette event cannot be separated from the preparation and implementation phases. Therefore, it is not possible to budget for a charrette in isolation. The cost is completely dependent on project scale and complexity, how much preparation work has to be done, available resources and data collection needs, and stakeholder outreach and engagement.

The price range for projects using a chartetre, including preparation and simplementation, can range from \$75,000 to \$250,000 and up.

Chartettes are paid for by a public agency, a private developer or both, as in public/private partnerships. Chartettes that focus on public planning projects (such as comprehensive or general plans) are usually paid for by a public agency, while developers pay for chartettes that involve development projects. The public agency and the developer sometimes share costs for large-scale master plans.

It is possible to reduce project costs through the use of volunteers, local agencies, and university architecture and planning departments. The National Charrette Institute and other organizations are working to create more affordable charrette models and resources, such as the NCI Charrette RFP Template, The Charrette Handbook, and the NCI Charrettes CD-ROM.

For more ideas on how to do a charrette on a tight budget, go to swww.knowledgeplex.org/xchat.html>, then scroll down to the archives for July 17, where you can near three experienced charrette organizers discuss ways of keeping costs down. A link to this discussion will also be posted at: www.plannersweb.com/charrettes.html>



Continuing on the PlannersWeb:

What do the Boston Red Sox, Fenway Park, and charrettes have in common? Find out more on our PlannersWeb site, with a fascinating report put together by *PCJ* General Manager Betsey Krumholz. We're also posting a list of resources for learning more about charrettes, with several online links. Go to: <www.plannersweb.com/charrettes.html>



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MAJOR THEMES

The Village of Pelham has identified the following themes as the major goals of its Comprehensive Plan. These themes and the Plan as a whole will help the Village to strategize its physical, social and economic development for the next ten years and more. The following statements describe the general way that residents desire development and growth in the Village to occur. Subsequent sections of the report will expand upon these goals and delineate strategies for achieving them.

2.1 Maintaining Village Character

The Village's neighborhoods— Chester Park, Pelville, Pelhamwood and Pelham Heights-all have special architectural and topographical features and should be preserved. The Comprehensive Plan will address the necessary regulations, protections and enforcement required to assure this preservation. It will also consider special architectural and landscape treatments for those areas outside of residential district; for example, the use of planning and design mechanisms to enhance Pelham's open space and commercial areas.

2.2 PROMOTING ECONOMIC DEVELOPMENT IN DOWNTOWN PELHAM

Downtown Pelham should be strengthened into a convenient, attractive and viable shopping district. The Comprehensive Plan will address necessary land use, wayfinding and parking, regulatory, and enforcement provisions required to achieve this goal. The band of commercial uses comprising Wolfs Lane and Fifth Avenue has the potential to become a lively shopping district with retail choices that can accommodate the needs of Pelham residents and new visitors. The Plan will discuss strategies such as business retention and branding that will capitalize on Pelham's economic development potential.

2.3 Sustaining and Promoting the Prosperity and Unique Qualities of Pelham

The 1989 Plan states that the Village is "characterized by a physical and social environment that should be preserved and that reflects the values of the families and individuals residing in the Village." This statement holds true with respect to development of this Comprehensive Plan, which will put forth strategies encompassing land

use, zoning, transportation, open space, and infrastructure. Laced throughout this flexible plan will be references to sustainability, which all municipalities interested in balancing quality of life with responsible growth and development must prioritize. As this Comprehensive Plan is implemented, Pelham will continue to evolve into a more healthy and diverse place to work, shop, play and dwell.



5.3 National and Regional Retail Trends

Emerging trends in retail reflect the efforts of developers, retailers and service providers that adjust their real estate products to suit the market. These developments that are most relevant to Pelham include the following:

- > Farmers Markets and Arts Markets. Many communities are developing alternative shopping areas that sell local products, crafts, art, and fresh produce. Many farmers markets are openair and operate only during certain seasons of the year. Crafts and arts markets are becoming mainstays for festivals and events in many communities. At the time this plan was being written, the Village entered into a contract with the Community Markets organization, to host a Farmer's Market in the center of the Village of Pelham along Harmon Avenue, every Sunday morning running from June 15th through Thanksgiving, November, 2008.
- > Small Grocers Going Out of Business. Many small grocers are impacted by the rise of superstores, and shopping center operators are hard-pressed to find replacements for small supermarkets that have gone out of business.
- > Emergence of the Super

- **Corner Store.** Retail experts forecast that new convenience store concepts will emerge that bring shopping closer to neighborhoods, combining grocery shopping, convenience retail, café dining and other services.
- > E-commerce, Direct Marketing and In-Home Shopping. Increasing numbers of people are shopping online, and continuing to purchase from mail order catalogs and television channels, which has the potential to reduce foot traffic in establishments such as bookstores and gift shops.

Other general retail trends that likely have a secondary impact on Pelham include:

- > Fewer General Merchandise
 Chains. The overbuilding of retail space has resulted to consolidation with chains shrinking or going out of business, creating more competition between municipalities for existing chains.
- > Malls Face Difficulty while
 Open Air Centers Gain
 Strength. Between 7% and 12%
 of all U.S. shopping malls are
 economically obsolete, and not
 many are being built today. Many
 retailers have instead opted for
 open-air shopping centers, which
 are drawing customers away
 from malls. Pelham's small size
 generally accommodates neither
 type, but spillover from larger
 neighboring municipalities could

- present opportunities.
- > The Growth of Freestanding
 Retail. Retail experts estimate
 that 80% of new retail developments are freestanding stores
 built near a larger (big box) store.
 Despite their proximity to other
 stores, these developments do
 not generate significant foot
 traffic. Pelham's small-scale
 downtown is not designed to
 accommodate this style of
 development, so it must look to
 strengthen its existing, increasingly unique pattern of smallscale shopping.

5.4 EVALUATION OF RETAIL OPPORTUNITIES/LEAKAGE ANALYSIS

When purchases are made outside the area and merchants capture the expenditures that local residents, businesses, or employees could otherwise have made with local merchants, this is called a leakage. When non-residents, businesses or employees outside the local area make purchases from local businesses, this is called an injection of retail sales. When retail sales exceed what local residents, businesses and employees expended, this indicates a "surplus," meaning that local merchants have captured sales from consumers outside the local area. Leakage indicates an opportunity for a specific merchandise line or retail type, while a surplus indicates that the local need

is already being met and that there is possible saturation for a specific retail type or merchandise line. To identify retail opportunities in the Village of Pelham, sales leakage analyses were undertaken to help determine in which retail categories the Trade Area is strong and where it is losing potential sales. A Leakage Analysis looks at a variety of merchandise categories and determines if the district is capturing its full retail sales potential. This is done by comparing demand, in terms of consumer expenditures, and supply, in terms of retail sales, within the Trade Area. For goods that are not readily available within the identified Trade Area, or when greater selection and/or better prices are available elsewhere, residents will travel outside the area to make purchases.

Leakage Analyses were undertaken for the following Trade Areas: Drawing Radius of up to 0.5 miles: to determine opportunities/surplus for Neighborhood Centers;

| Table 5-8 Leakage Analysis Summary | | | | | |
|--|------------------|--|--|--|--|
| | 0.5-Mile Radius | | | | |
| Total Consumer Expenditures | \$129.29 Million | | | | |
| Total Retail Sales | \$72.34 Million | | | | |
| Total Retail Opportunity/Leakage | \$56.86 Million | | | | |
| Source: Bureau of Labor Statistics, U.S. | | | | | |

The Leakage Analysis compares consumer expenditures from the Consumer Expenditure Survey⁸ versus Retail Sales from the Census of Retail Trade⁹ to determine opportunities and surplus for retail store classifications. Numbers that are negative (indicated in red parentheses) indicate that residents' spending power in that category is being spent outside of Pelham; therefore the Village would benefit by encouraging these retail categories to settle in Pelham, keeping residents' dollars in Pelham.

Pelham's demographic makeup, coupled with the composition of its commercial area, resulted in some noteworthy findings. Data from the Census of Retail Trade indicates that within a half-mile radius, local residents spent approximately \$129.2 million (total) while just over \$72 million were sold locally, indicating opportunities for almost \$57 million in sales. This is a tremendous amount of buying power in terms of how it might (and should) be harnessed to benefit the Village of Pelham and fund additional community services.

8 The Consumer Expenditure Survey from the Bureau of Labor Statistics, provides information on the buying habits of American consumers, including data on their expenditures, income, and consumer unit (families and single consumers) characteristics. 9 The Census of Retail Trade from the U.S. Economic Census, provides data useful in analyzing actual business activity at the community level. The Census of Retail Trade provides a useful starting point for analyzing business gaps and resulting opportunities in a community.

The Leakage Analysis and anecdotal information from the Village indicates opportunities in the following retail types:

- > Computer and software stores
- > Camera and photographic equipment stores
- > Specialty food stores
- Cosmetics, beauty supply and perfume stores
- > Clothing stores
- > Shoe stores
- > Luggage and leather goods stores
- > Musical instruments and supplies stores
- > Book stores and news dealers
- > Gifts, novelty and souvenir stores
- > Full service restaurants
- > Special food services

Of these, the Village should decide which stores it would prefer to see in its downtown and seek to attract them. Retail types such as clothing stores, shoe stores, gift stores and bookstores may be particularly appropriate for the scale of Pelham's commercial buildings and the composition of its population. Similarly, incubator/start-up businesses should also be encouraged in the Village, particularly for those small, independent businesses that want to gain a foothold in lower Westchester County.

Economic Census

Make the Community Attractive to Businesses.

- **Make the Physical Environment** Appealing. The adoption and implementation of Design Standards allows the community to achieve a degree of consistency in development that results in a pedestrian-friendly, safe and visually cohesive district. The Design Standards addresses various aspects that impact the character and quality of the built environment, such as where buildings and parking lots are to be located, the means of providing pedestrian access onsite, and the character of building design. Developers could use the standards when preparing their development plans and applications, and subsequently submitting them to the Planning Board for plan review and approval. Implementation of Design Standards will contribute to the overall enhancement of Pelham's community character. A more in-depth discussion of Design Standards is found in Section 4.3.
- > Overcome Barriers to Business Investment. The recruitment team should understand barriers, both perceived and real, that serve as impediments for businesses to relocate to Pelham. This could be determined through interviews with potential business owners to determine their perceptions. Upon understanding these

barriers, community leaders should work to minimize them. Sometimes creative incentives can be developed to make the district more competitive from a business investment perspective.

IMPROVE THE APPEARANCE OF PELHAM'S COMMERCIAL AREA.

- Pelham's commercial area lies in close proximity to transportation corridors, including the Hutchinson River Parkway and a commuter rail link to New York City. This commercial area remains the focal point for creating a vital gathering center. From an economic and community perspective, the revitalization of the viable commercial area would provide needed goods and services to local residents.
- > The businesses along Wolfs
 Lane/Fifth Avenue do not attract a critical mass of pedestrians. At the entrances to Downtown, creative paving patterns, banners and/or local plantings should be put in place to indicate pedestrian activity and provide enhanced visual appeal. It is important to remember that the three sections of Downtown (North, Central and South) each have their own identity and land use; signage and streetscape amenities should reflect this.
- Within Downtown, additional streetscape improvements would include those pedestrian amenities that make walking

- more interesting and enjoyable. Benches offer pedestrians a place to rest, talk, and people watch, and should be distributed widely. Attractive human-scale lighting enhances the aesthetic and engenders a sense of security. Trees, planters, hanging flower baskets, banners, and attractive pavement also help enhance the pedestrian environment. Pelham already has some of these elements functioning to make the Downtown an attractive place. The design standards discussed in Section 4 elaborate upon how to make these needed improvements.
- Downtown Pelham has the potential to represent the small town experience that people seek while also offering a wider variety of residential options. Although less than a mile long, this District could provide a variety of conveniences and services for residents as well as specialized shops and restaurants that would attract both Pelham residents and those from adjacent nearby communities such as Mount Vernon and New Rochelle (particularly with an influx of residents to developments such as Trump Plaza and Avalon by the Sound East in New Rochelle). Since the buildings, parks and shops in Downtown become a focus for civic, commercial and recreational activities, layout, connectivity, and design must be a priority.

OFFER INCENTIVES.

The Village of Pelham could consider the provision of incentives to help attract new businesses to locate in the community. Some of these incentives could include the following:

- Negotiation and leasing of space if the prospect is not working with a broker or not familiar with the area.
- Financing of building improvements, facades, displays, fixtures, inventory and start-up costs including a low interest pool. The Village of Pelham could apply for CDBG funds from the Governor's office of Small Cities or the NY Main Street Program from the NYS Division of Housing and Community Renewal (DHCR) to have seed funding for façade improvements and loan pools.
- Counseling with financial institutions and assistance in completing loan applications.
- District wide and marketing programs and advertising and promotion assistance for individual teams.
- Utilize the Chamber of Commerce to foster effective business-to-business networking.
- Technical assistance including market and feasibility analysis, business plan development, governmental regulations, advertising and physical design.
- Consider establishing a busi-

ness incubator, in which small businesses are housed in the same building and can share services, to help establish new businesses at a reasonable cost.

ENCOURAGE A VARIETY OF HOUSING TYPES DOWNTOWN BY REZONING TARGETED AREAS AND/OR STRATEGIZING WITH DEVELOPERS TO CREATE A MORE VIBRANT AREA.

The Village does not currently have a large number of housing units for households wishing to "start small" or downsize from a larger single-family home. The need for a variety of housing is only expected to increase over time, particularly as the baby boom generation ages. Locating multi-family residential units downtown will reduce the need for additional trips by car and enhance the feeling of community. In addition, for seniors that may be attracted to downtown, the increased density will lessen the isolation that often affects this age cohort. While such development is not discouraged by the current zoning, making the construction of multi-family housing more attractive to developers will encourage and speed up such development. The Village may work with developers to accomplish this by offering incentives such as density bonuses, fast-track site plan review, or tax abatements. Similarly, rezoning or creation of a zoning overlay can simplify the process for developers who would normally require a variance or special use permit for

certain types of multi-family housing. Two potential Village-owned sites for such development are the parking lot on 5th Avenue and 3rd Street, and the parking lot next to the firehouse, the latter of which is currently underutilized.

CONSIDER CLUSTERING OF SIMILAR BUSINESSES.

Clustering involves geographically grouping certain businesses together so that both the customers and business operators benefit. Strategic placement of businesses could help achieve synergy and competitiveness for a business district clusters must be physically located so that they are compact and not interrupted by incompatible space uses. The cluster must encourage the customer to shop the entire cluster and conform to the way people shop. Clustering could be achieved by zoning (provide a discussion on how to do this).

Cluster types could either be compatible clusters, complementary clusters, or comparison clusters. Compatible clusters relate to groups of businesses that share a particular market segment but offer unrelated goods and services. Complementary clusters are groups of businesses that share customers and market segments, but offer complementary goods and services. Comparison clusters are groups of businesses that carry the same or similar goods and often appeal to the same



markets.¹⁰ For example, an Arts and Entertainment District could be created in the Central Commercial District. This would involve the area from the Pelham Picture House to the Pelham Art Center. The district could include antique stores, art galleries, art studios, as well as restaurants, boutique shops, shoe stores, jewelry, and accessory stores. A Commercial/Office cluster could be created in the North Commercial District where office buildings could be developed, while a Neighborhood Convenience cluster could be located in the South Commercial District. An enhanced Neighborhood Convenience Center (pieces of which are already located there) could serve as location for a market, pharmacy, and other convenience needs.

ESTABLISH MORE PROMINENT GATEWAYS INTO THE VILLAGE.

The degree to which a community shapes this first impression can say a great deal to visitors about the values of residents and businesses. The entrances into Pelham from the Hutchinson River Parkway and Lincoln Avenue should be noted by distinctive signage and landscaping. These sites should be treated as important focal points with a more prominent sign and plantings welcoming visitors into the community and giving drivers a signal to reduce speed. The Village should work with

10 Center for Community and Economic Development, University of Wisconsin Cooperative Extension.

local businesses and volunteers to fund and maintain signage and landscaping at the gateways. A local business organization (or perhaps a future Business Improvement District) should be encouraged to contribute funding for gateway and streetscape beautification.

UTILIZE THE VILLAGE WEBSITE MORE
EFFECTIVELY. Another responsibility of
the Business Recruitment Team may
be to utilize the Village website as a
business recruitment tool. First, the
website should reflect the branding
system, as discussed above. Second, a list of all vacant or underutilized (and available) parcels should
be displayed clearly online as a link
to the municipal website. Potential
business owners should be able to
easily understand what parcels are
available, along with their location
and other useful characteristics.

SUMMARY

- Develop a Market Position Statement, Marketing Slogan and Logo.
- > Establish a Business Recruitment Team.
- Make the community attractive to businesses.
- > Improve the appearance of Pelham's commercial area.
- Encourage a variety of housing types downtown by rezoning targeted areas and/or strategizing with developers.
- > Consider clustering of similar businesses.
- > Establish more prominent gateways into the Village.
- > Utilize the Village website more effectively.
- > Enhance and support the promotion of cultural events and opportunities in Pelham's downtown.



Town of Ledyard Comprehensive Plan



The Town of Ledyard is a farming community. Agriculture helps define Ledyard's landscape and its people. The town's soils and climate are arguably some of the best in New York State and the nation. Diverse mixes of farms operate in the community – producing milk and livestock, fruits, vegetables as well as grain crops and hay. Farmers and non-farmers appreciate the important connection that agriculture has with the Town of Ledyard's history and its future.

Approximately 99% of the land in the Town of Ledyard is receiving Agricultural Assessment and/or coded as agricultural by the assessor. The majority of the town is comprised of Group 2 soils developed on glacial till with high lime content - generally deep and well to moderately well-drained. These soils are ideal for farming, and local farms have benefited from the quality of these productive soils.

While dairy and field crops are the majority of the agricultural production in the Town of Ledyard, smaller farming operations also exist. Wineries with small acreages of grapes, specialty fruit and

Why Agriculture is Important to Residents of the Town of Ledyard*

- Agriculture offers an open and natural landscape for the enjoyment of everyone
- Farms feed us.
- Farming is part of our heritage.
- Farms provide a tax base for the school district and roads but don't require many services.
- Farming is a way of life to many families it is the social fabric of the community
- Agriculture has and can impact water quality.
- Farms help cycle money within the community.
- Farms are a source of jobs for local people.
- The soil base and climate in the town is one of the best in the country.

vegetable crop farms, artisan cheese production, nursery and floral crops are flourishing. These farms direct market and promote the buy local retail trends. Large scale vegetable farms operate under contracts with processors and wholesale buyers as well as direct market.

10/08/12 Page 8-1

^{*}Based on comments from public meetings held during the development of the new comprehensive plan for the Town of Ledyard.

Town of Ledyard Comprehensive Plan

There are several beef cow/calf and finishing operations in Ledyard, along with a hunting preserve and Cornell University Robert B Musgrave Research Farm. Several farms have pleasure horses and one farm has a long-standing reputation for raising workhorses.

Numerous agribusinesses benefit from the economic productivity of Ledyard's farm businesses. These include a trucking company specializing in fertilizer and feed as well as farm enterprises specializing in custom fieldwork and raising replacement dairy heifers.



Cornell University Robert S Musgrave Research Farm



Based on comments from public meetings held during the development of the new comprehensive plan for the Town of Ledyard, farming in the Town of Ledyard continues to change as market forces, family situations and other conditions evolve. Some of the challenges facing local farmers include: Rising costs of doing business, challenges finding and keeping skilled labor, regulations,

maintaining water quality, lack of young farmers, declining infrastructure for supporting farms, increasing fuel costs and people selling building lots.

Farmers respond differently to these challenges. Some farms grow in size taking advantage of economies of scale. Others rely on off-farm income or the production of specialty crops. Still other farmers are looking for new market opportunities – such as raising heifer, custom field work or direct farm sales.



Aurora Ridge Dairy

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Town of Ledyard Comprehensive Plan



The Town of Ledyard recognizes the importance of agriculture to its future. While the town can not address all the challenges facing local farmers, it seeks to be pro-active in supporting opportunities for farmers, retaining its valuable farmland and supporting environmental stewardship by farmers. Its goals related to agriculture include: Retain productive farmland for active use by farmers, support economic opportunities for farmers and businesses that complement agriculture, and encourage agricultural land uses and farming practices that protect and enhance the natural environment.



Old Barn on Lake Rd across from Long Point Winery

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| Str | ategic Matrix for Implementing the Lake | Luzerne Comp | rehensive Plan | | | _ | | | | |
|---|--|-----------------------------|---------------------------------|--|--|---------------------------------|-------------------------------------|-----|---------------------|--|
| | | Implementation Leader(s) | Other Involved Agencies | Partner with Private Sector? (Y/N) | First Steps | Potential Funding Source(s)* | Implementation Timing / Priority | | Date Implemented | |
| Topic | c Area | | | | | | High | Med | Low | |
| Hai | mlet Revitalization | | | | | • | | | | |
| | | | | | | | - | | | |
| | n Hamlet Committee | -1 | | | | | | | | |
| Obj | ective A: Encourage planned growth and development within the existing historic hamlet area | | | | | | | | | |
| 1.1 | Address infrastructure issues limiting revitalization and infill development, especially municipal sewer system | Town Board | Infrastructure Working Group | Y | Seek funding for study | NYSDOS Coastal Resources | X | | | |
| 1.2 | Prepare a Hamlet Revitalization Plan | Town Board | Hamlet Committee | N | Seek funding for study | NYSDOS Coastal Resources | X | | | |
| Objective B: Continue to improve Historic Hamlet to maintain its position as the center of life and identity for Lake Luzerne | | | | | | | | | | |
| 1.3 | Enhance hamlet gateways | Town Board | Hamlet Committee | N | Complete as part of hamlet revitalization plans | NYSDOS Coastal Resources | X | X | | |
| 1.4 | Encourage hamlet beautification | Town Board | Hamlet Committee | Y | Complete as part of hamlet revitalization plans | NYSDOS Coastal Resources | X | X | | |
| 1.5 | Continue to create pedestrian and bicycle amenities | Highway Department | Warren County | N | Compile set of standard improvements | NYSDOT, Warren County | | X | X | |
| 1.6 | Create a set of Hamlet Design Guidelines | Code Update Committee | Town Board, Hamlet Committee | N | | NYSDOS Coastal Resources | X | | | |
| 1.7 | Establish programs and obtain grants to upgrade older homes | Town Board | Warren County | Y | Discuss with Warren County Planning Department | NYS OSC | X | | | |
| 1.8 | Investigate potential to create a Business Improvement District (BID) | Town Board | Hamlet Committee | Y | Survey local businesses to determine interest | | X | | | |
| Obje | ective C: Strengthen identity of secondary Ha | mlet areas | | | | | | | | |
| 1.9 | Review zoning ordinance and alter to allow for desired growth in secondary hamlets and limit commercial uses where determined incompatible | Town Board | Code Update Committee | N | Complete as part of zoning update & subdivision update | NYSDOS Coastal Resources | X | | | |
| 1.10 | Establish signage and design guidelines to identify and distinguish secondary hamlet areas | Town Board | Code Update Committee | N | Complete as part of zoning update & subdivision update | NYSDOS Coastal Resources | | | X | |