



TOWN OF LAKE LURE *Community Development Department*

MEMORANDUM

TO: Honorable Mayor, Town Council and Zoning & Planning Board

FROM: Shannon Baldwin, Community Development Director

DATE: April 11, 2017

RE: Comprehensive Plan Update

The end is near after many months of meetings, careful study, new elections and appointments, and a new Town Manager!

What is the purpose and objective of the Comprehensive Plan Update project?

The purpose is to update the 2007-2027 Comprehensive Plan by gathering community input and feedback from town officials to create an action plan to supplement the original 2007 Implementation Matrix. The objective is to produce an enhanced Implementation Matrix as of 2017, a document that will be used as a guide for town initiatives and operations over the next five to eight years.

Why did the project come about?

- Much had changed since 2007 (ten years ago) and the town government was in need of a fresh “to do” list that would last another five to eight years. The town has completed action items in the Comprehensive Plan Implementation Matrix (**CPIM**) much faster than anticipated.
- Various Town Council members expressed a desire to update the Comp Plan
- Mayor Keith wanted to engage the at-large community on various topics
- The Town Manager wanted to engage Town Council in a process to develop near-term strategic goals and plans
- The Planning Board requested a list of new projects and priorities from Town Council
- Only 8 years into our 20-year plan, we had completed almost 60% of the action items in the Implementation Matrix that we set out to accomplish

How was the project organized and initiated?

- A steering committee was formed made of the Mayor, Mayor-Pro Tem, Planning Board Chair, Planning Board Vice-Chair, Town Manager and Community Development Director to develop a process to respond to the requests and interests above (mid-July 2015)
- Vital Clarity, a consulting firm, was engaged to help design a streamlined process that would result in a freshened Comp Plan Implementation Matrix (CPIM)

- Steering Committee members were interviewed by Kathleen Osta, of Vital Clarity, and a process developed.
- Scope of work and schedule was developed with the Steering Committee's cooperation and Town Council's approval. An agreement was developed between Vital Clarity and the Town outlining the scope of work and schedule
- The Town Manager signed the agreement between Vital Clarity and the Town to proceed with the process as outlined (mid-August 2015)

What else has taken place so far, relative to process, meetings, and output?

Phase I

- Town Staff reviewed all Implementation Matrix action items and created a "scorecard" in document form.
- Staff used the scorecard to determine the status of each CPIM action item based on five criteria: Complete (C), Ongoing (O), Underway (U), Initiated (I) and Not Started (NS) and released in document form
- Town Council and Planning Board evaluated the action items using the following question, "Of the policies and activities not started or only initiated, which do you feel are a priority for the next five years?"
- Staff compiled the TC/PB evaluation results in document form
- Vital Clarity facilitated a joint meeting of Town Council and the Planning Board to review the State of the Town Address (Town Address), take the Community Survey (Survey), and solicit feedback regarding those two items and important town projects, past and future (mid-September 2015)

Phase II

- Town staff tweaked the Town Address and Survey, created a postcard mailer (used to alert property owners and voters of the Town Address and Survey online and inviting them to the Visioning Workshop), loaded the Survey into Survey Monkey, and launched the postcard mailer, September 2015
- Vital Clarity trained five facilitators from the Lake Lure Community (mid-October 2015)
- Town staff compiled the Survey results from nearly 400 respondents in document form
- The Visioning Workshop was held on October 19, 2015 with approximately 75 citizens and stakeholders participating. The Town Manager delivered the survey results and Kathleen Osta, along with the five trained volunteers, facilitated the workshop.
- The results from the Visioning Workshop were processed in document form
- Staff posted final Vision document on Town website

Phase III

- Staff and Vital Clarity gave Steering Committee recap on February 1, 2016.
- Staff & Consultant performed preliminary work on consolidating all input, February and March, 2016
- Comp Plan Update process put on hold during search for new Town Manager, March 2016
- New Town Manager first day, August 1, 2016
- New Town Manager oriented along with Steering Committee, August 16, 2016
- Staff Work Session held to discuss IM projects, October 13, 2016
- Stakeholder group meeting held to finalize 2017-2017 Project calendar and name strategic directions, November 7, 2016
- Town Council and Staff Retreat held, December 1, 2016

- Zoning and Planning Board to review final Comp Plan Update Project Calendar, April 18, 2017
- Final documents and Planning Board's recommendation posted on the Town's website, April 18, 2017
- Town Council to hold a Public Hearing and consider adopting the Comprehensive Plan Project Calendar for 2017-2017, May 16, 2017

How do we use the Comprehensive Plan Update once complete and adopted?

The Comprehensive Plan Project Calendar will be used by the Department Heads, Town Manager and Town Council for developing yearly work plans and budgets as the town strives to realize its vision.