



2007 – 2027 Comprehensive Plan – 2015 Update

What was the purpose and objective of Updating the Implementation Matrix of 2007-2027 Comprehensive Plan?

The implementation matrix is simply the action plan of all of the recommendations made in 2007 for the 20-year Comprehensive Plan. The objective was to produce an enhanced matrix, a document that can and will be used as a guide for town initiatives and operations over the next five years.

Why did the Comprehensive Plan Update project come about?

- Much had changed since 2007 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 Comprehensive Plan.
- The Mayor 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 Zoning & Planning Board requested a list of new projects and priorities from Town Council.
- Only 8 years into our 20-year plan, nearly 60 percent of the action items in the Implementation Matrix have been completed/accomplished.

How was the project organized and initiated?

- A steering committee was formed comprised 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.
- A 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?

- Town Staff reviewed all CPIM 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)
- 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
- Vital Clarity trained five facilitators from the Lake Lure Community (mid-October)
- 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

How do we use the output of the visioning session and where do we go from here?

The steering committee and town staff will develop additional policies, goals, and objectives for a draft version of new Comprehensive Plan Implementation Matrix based on community input and town officials’ feedback. These will be added to the most relevant, unfinished items from the 2007 matrix.

Priorities and timeframes will be assigned for each policy and objective (December 2015 –January 2016)

1. Objectives will be Specific, Measurable, Attainable, Realistic and Timely (S.M.A.R.T.) to ensure they are easily tracked and reported
2. Policies will be distinct from objectives and provide guidance and direction

The draft document will be reviewed with Town Council and the Zoning & Planning Board and incorporate any additional input from the community.

After incorporating feedback from Town Council, the Zoning & Planning Board and the community, both boards will receive a request to adopt the new CPIM.

Once it is complete, how will the Comprehensive Plan Implementation Matrix be used?

As the town continually strives to realize its vision, The 2016 Comprehensive Plan Implementation Matrix will be used by the Department Heads, Town Manager and Town Council for developing yearly work plans and budgets.