The Returns on Investment in Planning: How Planning and Planners Add Value to the Municipal Team
On Planning…

Planning is bringing the future into the present so that you can do something about it now.
- Alan Lakein

If you fail to plan, you are planning to fail!
- Benjamin Franklin

Let our advance worrying become advance thinking and planning.
- Winston Churchill

Men often oppose a thing merely because they have had no agency in planning it, or because it may have been planned by those whom they dislike.
- Alexander Hamilton
Speakers:

MIKE GOMAN

R. Michael Goman, Principal, Goman + York has more than 30 years of experience in the real-estate industry. Mike serves as an advisor to tenants, corporations, institutional investors and high-net worth individuals regarding commercial real-estate investment, acquisition and development. Mike’s experience covers the financing, development, management and leasing of more than 50 million square feet of commercial real estate, and the acquisition or disposition of more than $3 billion of commercial real estate. Mike also serves as President of Accubranch LLC, a provider of real-estate market research, strategic network planning and branch program implementation service to regional and community banks. Previously, he was President and CEO of Konover & Associates for 12 years and founder and a principal of American Centers, Inc. in Dallas, TX providing acquisition, development, leasing, management and consulting services to shopping-center owners.

BARRY FELDMAN

Barry is the Associate Director of the Graduate Public Policy Program and a Visiting Associate Professor of Public Policy at Trinity College, Hartford, Connecticut. As the Associate Director he is involved in curriculum planning, student advising and faculty affairs. He also has significant experience in leading and managing public organizations. Barry was the Chief Operating Officer at the University of Connecticut (COO) for over six years. His portfolio covered a wide range of responsibilities including management of the UCONN 2000 and UCONN 21st Century Programs, which was the State of Connecticut’s $2.3 billion investment in UConn campuses. Barry’s experience also includes serving as the City Manager of several cities highlighted by his twenty-one year tenure as the Town Manager of West Hartford, Connecticut. During Barry’s tenure as West Hartford Town Manager the town experienced a dramatic increase in economic development activity capped by the construction of the highly praised Blue Back Square development.
Speakers:

MARK PELLEGRINI

Mark Pellegrini has over 35 years of experience as a public sector planner at the municipal and county level. He has been the Director of Planning and Economic Development for the Town of Manchester since 1984. Mr. Pellegrini has experience in planning and administering programs in housing, economic and community development, redevelopment, comprehensive and strategic planning, historic and open space preservation, and development administration. He has served as a member of or an advisor to regional planning, professional and non-profit organizations involved with urban and regional planning and policy. Mr. Pellegrini received a Bachelor of Arts degree in Journalism from Marquette University and a Masters in Urban and Regional Planning from the University of Pittsburgh. He is a member of the American Institute of Certified Planners and American Planning Association and is a past president of the Connecticut Chapter of APA.

DIANE WHITNEY

Diane W. Whitney, partner Pullman & Comley LLC, heads the firm’s Land Use Group and is a member of the Environmental and Litigation practices. She represents businesses and individuals in matters involving contaminated property and land use applications on the local, state and federal levels. She serves on the boards of the Hartford Symphony Orchestra and the Connecticut Women’s Hall of Fame. She was previously a member of Windsor’s Planning & Zoning Commission for eleven years and served as an Assistant Attorney General for the State of Connecticut for four years.
Moderator

Linnea McCaffrey, AICP, Land Use Analyst at Robinson + Cole LLP, holds a Master’s in Urban and Regional Planning, and has over 25 years of experience in planning and zoning practice and development permitting. She works primarily on commercial development, analyzing project feasibility and permitting, preparing state and local applications, drafting regulations, and reviewing properties for regulatory compliance for financing or other development considerations. Ms. McCaffrey also provides project management support by communicating with local officials on behalf of clients, and managing and coordinating the review process for clients and their design professionals.
AICP and the Certified Planner’s Code of Ethics – Linnea McCaffrey

American Institute of Certified Planner’s Code of Ethics and Professional Conduct contains both:

- **Aspirational Principles** that constitute the ideals to which we are committed
- **Rules of Conduct to which we are held accountable.** If we violate any of these rules, we can be the object of a charge of misconduct and shall have the responsibility of responding to and cooperating with the investigation and enforcement procedures
Aspirational Principles include:

- be conscious of the rights of others
- have special concern for the long-range consequences of present actions
- provide timely, adequate, clear, and accurate information on planning issues to all affected persons and to governmental decision makers.
- seek social justice by working to expand choice and opportunity for all persons, recognizing a special responsibility to plan for the needs of the disadvantaged and to promote racial and economic integration. We shall urge the alteration of policies, institutions, and decisions that oppose such needs.
- promote excellence of design and endeavor to conserve and preserve the integrity and heritage of the natural and built environment.
- deal fairly with all participants in the planning process. Those of us who are public officials or employees shall also deal evenhandedly with all planning process participants.
Responsibility to Employer for diligent, creative, and competent performance:

- exercise independent professional judgment on behalf of our clients and employers.
- accept the decisions of our client or employer concerning the objectives and nature of the professional services we perform unless the course of action is illegal or plainly inconsistent with our primary obligation to the public interest.
- avoid a conflict of interest or even the appearance of a conflict of interest in accepting assignments from clients or employers.

Responsibility to Our Profession and Colleagues, includes:

- protect and enhance the integrity of our profession.
- educate the public about planning issues and their relevance to our everyday lives.
- examine the applicability of planning theories, methods, research and practice and standards to the facts and analysis of each particular situation and shall not accept the applicability of a customary solution without first establishing its appropriateness to the situation.
Rules of Conduct include:

• shall not deliberately or with reckless indifference fail to provide adequate, timely, clear and accurate information on planning issues.

• shall not accept an assignment from a client or employer when the services to be performed involve conduct that we know to be illegal or in violation of these rules or which may cause us to take a position adverse to one taken in the last three years

• shall not use to our personal advantage, nor that of a subsequent client or employer, information gained in a professional relationship that the client or employer has requested be held inviolate or that we should recognize as confidential because its disclosure could result in embarrassment or other detriment to the client or employer.

• shall not sell, or offer to sell, services by stating or implying an ability to influence decisions by improper means.
PLANNING
Vision – Why
↓
Goals – What
↓
Objectives – How

IMPLEMENTING
Actions – Do it
↓
Results – Did it
↓
Evaluate – What happened
PLANS: GEOGRAPHIC SCOPE

- Comprehensive
- Neighborhood
- Corridor
- District/Special Area
PLANS: FUNCTIONAL

Economic Development  Urban Design

Parks & Recreation     Historic Preservation

Housing               Environmental

Transportation        Community Facilities
WHY PLANNING?

• Comprehensive (POCD)
  – To establish a vision of the kind of community you want to be.

• Neighborhood | Corridor | Special Area
  – To establish goals (what) and objectives (how) to take advantage of opportunity, solve problems, or manage change.
WHY PLANNING?

• Functional
  – To focus on those aspects of the community that will contribute to achieving community vision and goals.
VALUE OF PLANNING?

• Adopt or change regulations or ordinances to achieve the community vision.

• Be in a strong position to obtain grants because you have a strategic vision.
VALUE OF PLANNING?

• Avoid litigation.

• Minimize risk/maximize opportunity when making municipal investments.
PLANNERS’ SKILLS

• Research – Issues & Options

• Alternatives Analysis

• Design & Manage Processes
  – Facilitate – Engage – Listen – Devil’s Advocate

• Community Engagement
  – Get the right stakeholders to the table
PLANNERS’ SKILLS

• Interdisciplinary

  – Law
  – Engineering
  – Architecture
  – Real Estate
  – Construction

  – Urban Design
  – Budget & Finance
  – Management & Administration
  – Infrastructure
  – Demographics
WHAT CAN PLANNERS DO TO BE VALUABLE?

• Plan with people – not for people
• Ask the hard questions
• Be transactional and open-minded
• Be willing to implement – not just plan
• Offer your skills and expertise to internal customers as well as to your boards and commissions.
Planning from the Town Manager’s Perspective – Barry M. Feldman

• The role of traditional planning and the emergence of entrepreneurial planner

• The traditional long-range plans need to be a realistic effort at thinking and writing about the community’s future

• A critical component in the long-range planning effort is the early and consistent involvement of the chief executive officer and depending on the community legislative leaders

• The emergence of the entrepreneurial planner…and the need to understand the changing role of planning
• Influences that are changing the role of the municipal planner…local
government as an institution is becoming more entrepreneurial; planning
must incorporate the ability to work across domains with a variety of
groups and interests

• Entrepreneurial planners should be involved as the community considers
what tasks it chooses to do, what services to contract to third parties and
how to find money to do this work.

• Entrepreneurial planners should be involved with integrating the ten year
plan with a ten year capital improvement plan and budget; integrating the
municipal and board of education’s capital improvement plans and budgets

• Traditional planning, the entrepreneurial planner and the creation of blue
back square
Blue Back Square, West Hartford
Blue Back Square, West Hartford
What a Developer is Looking for – Mike Goman

The following are a couple of speculative suggestions, without the benefit of Mike’s input

• Clear plans and municipal policy reduce risk
• Well run review process, staffed by a professional, can reduce the time required for development approval – reducing risk and cost to developers
WHAT CAN GO WRONG IF A TOWN HAS NO PLANNER? – Diane Whitney, Pullman & Comley

Well, to name just a few:

1) you can end up approving a subdivision by not acting within statutory deadlines

2) you can hand an applicant a sure appeal issue
   “I’ve done a little research of my own” says a Commissioner.
   “I’ve talked to a lot of residents about this application, and they don’t like it at all”
3) you can miss the boat on interesting new planning concepts for example: Form-Based Codes and Transit-Oriented Development
4) you can lose that valuable new use to the town next door
5) you can fail to plan for infrastructure improvements needed for development and normal growth
WHAT CAN GO RIGHT IF A TOWN HAS A PLANNER?

1) a town can decide what it wants its future to be – what character it wants to have – and implement the zoning techniques that will carry out those goals

2) with the ability to plan for the town’s long-term future, infrastructure necessary for future development can be planned on a long-term basis
3) development plans that would not carry out the goals of the town can be diverted from inappropriate locations and encouraged to locate where they better fit into the long-range planning

4) sensitive areas (wetlands, ridge lines, scenic highways, coastal areas) can be preserved

5) innovative zoning techniques can be fit into the town’s future plans
A FEW EXAMPLES OF THE BENEFITS OF LONG-RANGE PROFESSIONAL PLANNING

GREAT POND IN WINDSOR

A town within the town of Windsor – new urbanist, form-based code incorporated into Windsor’s zoning regulations, providing for 4,000 dwelling units ranging from studio apartments to luxury single family homes with a variety of parks, stores, restaurants, and recreational opportunities, while preserving more than 300 acres of undeveloped land along the Farmington River.
Great Pond in Windsor

The plan for Great Pond builds on the pattern of traditional towns found throughout the region. The Town of Windsor, Windsor Locks, Simsbury, Avon, Granby, Bloomfield, and Enfield are all examples of towns built to accommodate pedestrian and vehicular access to shops, housing and services in a diverse mix of building types and architecture.

The design for the new community builds on the regional demand for a broad offering of housing choices and services that will appeal to a young, highly mobile workforce as well as empty-nester households.

Great Pond is conceived as a series of distinct neighborhoods and special places that offer diverse housing choices, unparalleled access to trails, parks and open space, a walkable neighborhood retail center with shops, small offices and services and high quality civic spaces that foster social interaction for those living and working in the Town.
Great Pond in Windsor

Just as in the historic towns surrounding Great Pond, uses such as shops and offices, residential and educational will be mixed within the heart of the community radiating out from Great Pond Park.

The southern and eastern neighborhoods between the pond and Day Hill Road will have the greatest variety of uses and mix of building types. These blocks are typically a bit larger and have common parking courts in the middle of the block.

The blocks south of Day Hill Road will accommodate the larger offices, hotel, institutional and some retail uses.

North of Great Pond Park, residential neighborhoods, each with a different character and sense of place, will link the southern districts to the Preserve.
Great Pond in Windsor

The planning for Great Pond is being governed by a “Form-Based Code” developed specifically to ensure that development patterns, public open space, and the variety of building types and uses are employed in the detailed design and construction over time.

Communities of this scale and diversity will evolve over time with many different builders, owners, architects, and tenants. Form-Based Codes establish the desired relationships between buildings, streets, parks and conservation areas as well as defining the scale and character of the buildings. The code is administered through the Town of Windsor.

Download Form-Based Code
Northwest Park in Windsor

473 acres of woods and former tobacco farms the town’s long-time planner Mario Zavarella convinced the town to buy many years ago. Now the site of a nature center, animal barn, coffee house, miles of cross-country and hiking trails, and camps for children.
Northwest Park in Windsor
Contacts:

Please add all speakers contact information here.

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The Connecticut Conference of Municipalities (CCM) is Connecticut's statewide association of towns and cities. CCM is an inclusionary organization that celebrates the commonalities between, and champions the interests of, urban, suburban and rural communities. CCM represents municipalities at the General Assembly, before the state executive branch and regulatory agencies, and in the courts. CCM provides member towns and cities with a wide array of other services, including management assistance, individualized inquiry service, assistance in municipal labor relations, technical assistance and training, policy development, research and analysis, publications, information programs, and service programs such as workers' compensation and liability-automobile-property insurance, risk management, and energy cost-containment. Federal representation is provided by CCM in conjunction with the National League of Cities. CCM was founded in 1966.

CCM is governed by a Board of Directors, elected by the member municipalities, with due consideration given to geographical representation, municipalities of different sizes, and a balance of political parties. Numerous committees of municipal officials participate in the development of CCM policy and programs. CCM has offices in New Haven (headquarters) and in Hartford.

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