

# Plan Commission Handbook

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# Chapter 3

## Community Planning

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## OVERVIEW OF COMMUNITY PLANNING

When we take a close look at our communities we can see growth and change occurring on the landscape – more homes being built, more commercial areas to serve those homes, and less farmland, open space and wild areas. Between 1992 and 2010, for example, Wisconsin lost a total of 396,583 acres of farmland to urban development.<sup>1</sup> Between 1965 and 1995, the number of dwelling units on northern Wisconsin lakes increased threefold.<sup>2</sup> More recently, seasonal cottages on lakes and rivers have been converted to large, year round homes complete with suburban lawns and landscaping. While some communities welcome these changes, others find it difficult to deal with the consequences of growth such as an increased demand for urban services or loss of rural character.

Social, economic and demographic changes are also underway in our communities. After experiencing slow growth in the 1980s, Wisconsin's population rebounded forcefully in the 1990s growing by 10%. Population growth remained strong throughout the first part of the decade before declining in response to the 2008 financial crisis.<sup>3</sup> The Wisconsin Department of Administration projects that we will add a total of 717,000 new households or the equivalent of 1.3 million people between 2000 and 2035. Wisconsin's elderly population is projected to more than double during that time period.<sup>4</sup> Housing needs are also likely to change in response to a growing elderly population and more people living in smaller households.

<sup>1</sup> *Losing Ground: Tracking the Rate of Farmland Loss in Wisconsin Counties 1992 to 2010*. April 2012. Aaron Thompson. Center for Land Use Education.

<sup>2</sup> *Northern Wisconsin's Lakes and Shorelands: A Report Examining A Resource Under Pressure*. January 1996. Wisconsin Department of Natural Resources.

<sup>3</sup> *Wisconsin Population Estimates Summary*. January 2011. Wisconsin Department of Administration.

<sup>4</sup> *Wisconsin Population 2035: A Report on Projected State and County Populations and Households for 2000-2035*. October 2008. Wisconsin Department of Administration.

### ► What is Community Planning?

Clearly, land use and demographic changes have serious implications for how we plan and build our communities. Through community planning, local governments can work collaboratively with residents and stakeholders to articulate how they want their communities to look, feel and function in the future. Planning helps us to answer questions such as: Where and how do we build new homes, schools, businesses, roads and public infrastructure? How do we deal with parts of the community that are overbuilt, deteriorating or otherwise inappropriate? How do we preserve those parts of the community that we value?

As a process, planning strives for an open, orderly approach to determine community needs, set goals and priorities, and develop a guide for local decision-making. Planning is also place-based, meaning that it focuses on the unique qualities of a place and attempts to include people from all walks of life in determining the future social, economic and physical development of the community.

Planning results in a specific product, a plan, that documents the community's past, present and future. The plan should be used by local officials, members of the plan commission, and private citizens to make informed decisions about the community. It can guide decisions related to land use, economic development, environmental protection, community revitalization, infrastructure and service provision, and other related matters.

### ► Benefits of Community Planning

Community planning entails a lot of time, work and resources. It includes making difficult decisions that are neither quick nor easy. Fortunately, there are numerous, tangible benefits to planning. Following are some of the most significant:

**Education and engagement of the public.** The planning process is an opportunity to learn and re-learn about the community, its residents and their hopes and wishes for the future. It can open up new or rejuvenated conversations about land use, development, conservation, and shared services. Planning can also ease concerns over contentious land use issues such as rezones or boundary disputes. As a process, planning strives to make local decision-making more open and democratic.



**Vibrant rural and urban communities.** Planning fosters a distinctive sense of place by regulating the design and location of new development and preserving those features a community feels are important. Planning strives to create places that are attractive, convenient, functional, safe and efficient.



**Conservation of natural, historic and cultural landscapes.** Planning can help to conserve landscapes that provide important public benefits such as wildlife habitat, storage of flood waters, groundwater recharge and view sheds which would be difficult and expensive to replace if damaged. Planning can also help to preserve historic or cultural resources which would be irreplaceable if lost.



Photos: Grabow, et. al., Principles of Community Placemaking, Graphic Library

**Predictability regarding future development.** Plans provide a factual and objective basis to support local decision-making. They provide local communities with guidance about where and what type of development is desired. Planning also provides consistency and fairness for those involved in the development review process.



### A Sound Basis for Land Use Decision-Making

The plan commission should consult the plan when making the following types of decisions or recommendations:

- rezones and other land use permits
- annexations
- major public investments such as new roads and parks
- location or expansion of sewer, water and other infrastructure



**Promotion of economic development.** Communities that plan have an opportunity to manage new growth and take advantage of opportunities better than those that do not. For example, planning can provide information about existing businesses and industries and identify what kinds of businesses the community wants or needs in the future. Planning can also help to determine if the work force is sufficient to staff particular jobs or if local infrastructure and services are adequate to accommodate new development.

**Efficient use of local services and infrastructure.** Planning provides a means to coordinate individual land use decisions and prevent haphazard development. Well planned, orderly and phased development is generally more efficient and less costly to serve than low density or scattered development. These savings can be used to enhance public services and keep property taxes low.

**Protection of private property rights.** Good planning can protect property values and minimize negative impacts associated with new development. Without an appropriate planning and regulatory framework, new development can expose adjoining landowners to incompatible or nuisance land uses and loss of property values. Even though some property owners view land use regulations as an infringement upon their property rights, the purpose of such regulations is to protect those rights.



Photos: Grabow, et. al., Principles of Community Placemaking, Graphic Library

*"There are two basic products that emerge from the planning process – plans and regulations. The first is a blueprint, while the second is a tool. Plans represent goals, things to be achieved, while regulations represent the vehicle to reach those goals."*

– William Toner  
Planning Made Easy



### *Principles of Community Planning*

In the book, “*The Small Town Planning Handbook*,” authors Daniels, Keller, and Lapping stress a variety of important principles for community planning:

**“...care for your town, its people, and those generations yet to be born.”**

Community plans and planning affect peoples' lives. Tough choices must be made about the natural, manmade, and financial resources in the community. Learning to care means that you have to adopt an attitude of fairness, that you listen to the opinions of others, and that you are willing to make compromises to ensure equal treatment.

**“...look before you leap...”**

Planning enables us to look before we leap and avoid costly and embarrassing mistakes. Through planning we come to understand where we are now and what must be done in the future to achieve our goals. We can then put together a plan of action to accomplish tasks on time.

**“...serve the best interests of the community...”**

Community planning is intended to serve the best interests of the community, which requires striking a balance between being recklessly innovative and stubbornly conservative. It should channel and guide market forces to foster growth and redevelopment in an efficient manner that follows the desires and guidelines of the community.

**“...maintain a positive quality of life and revitalize the community.”**

The planning process is an opportunity to look at the current positive and negative aspects of the community. What is good about the community should be carefully nurtured and protected; what is bad should be addressed and changed; and, what is possible should be sought after and attained.

**“...educate us about ourselves...”**

The community planning process also helps us to educate us about ourselves, our attitude towards others, and our willingness to share a sense of community. It stimulates us to think and reminds us of the need to understand, tolerate, and even support, the opinions of others.

**“...depends on local people...”**

Successful community planning depends on local people and the key ingredient is local leadership. Community leaders need to be pro-active in knowing when to plan and have the will to follow through.

Excerpted from: Dortches Land Development Plan, Chapter I, Section A. “Introduction and Purpose.” 2009. <http://dortchesnc.govoffice2.com>. Citing: Daniels, Thomas L., J. Keller, M. Lapping. *The Small Town Planning Handbook*, 2nd Ed., APA Planners Press, 1995.

## PREPARING FOR THE PLANNING PROCESS

The plan commission is charged with the legislative function of preparing a community's comprehensive plan. Because most plan commission members are not planners and have little knowledge of planning per se, guiding a planning process and preparing a comprehensive plan or other community plan can seem a daunting task. The big question that most plan commission members often ask is: how do we get started? What are the first steps in preparing a plan?

### ► Determining the Need for Planning

The first step in initiating a new planning project is to identify your community's *need* for planning. There are three major reasons communities plan. The first and primary reason is to address issues of local concern. For example, a community may be struggling to site a new power line, control the loss of farmland, or prevent haphazard development. Planning enables communities to step back, examine local issues and alternatives, and devise a plan of action to guide local decision-making.

Another reason for planning is to update outdated or inconsistent plans. Planning documents can and do become out-of-date. A community's vision, goals, objectives and policies are likely to evolve as social, economic, technological and environmental conditions change. The factual content of a plan, such as current and projected population may also need to be updated on a fairly regular basis. Communities should review their plans on an annual basis and make substantive updates at least once every five or ten years as conditions warrant.

Legal requirements are another motivating factor for many communities to plan. The State of Wisconsin adopted a new comprehensive planning law in 1999 which requires new or revised zoning, subdivision and official mapping ordinances to be

consistent with an adopted comprehensive plan beginning in 2010. The content and process for adopting a plan are also described in the law. In 2009, the state adopted the Working Lands Initiative which requires counties to prepare updated farmland preservation plans by 2015. Both initiatives resulted in an unprecedented number of Wisconsin communities preparing new plans. In the future, we will likely see additional changes to planning laws and state agency rules which may spur additional planning.

### To Plan or Not To Plan?

Planning is not right for all communities at all times. While some communities call for endless planning studies in order to avoid making controversial decisions or taking action, other communities initiate new planning studies for the sole purpose of complying with a legal mandate or garnering free grant money. These conditions often result in a community going through the motions and producing a plan that 'sits on the shelf.' Old plans that were never implemented are a good indicator that the community undertook planning for the wrong reasons or failed to secure support for the planning initiative.

### ► Diagnosing Your Community

There are several methods a community can use to assess their need, capacity and readiness for planning. A 'diagnostic study' generally begins by inventorying existing plans, studies and regulations. These items should be reviewed to make sure they are up-to-date, satisfy existing legal requirements, and are being implemented.

Next, the community should assess how well local plans and regulations meet the needs of local decision-makers and the community-at-large. A series of local meetings, interviews, focus groups or a survey can help to identify current planning issues, resources available

for planning, and concerns with previous planning efforts. An analysis of recent media coverage can also shed light on these issues.

Lastly, valuable lessons can be learned by consulting with county planning agencies, regional planning commissions, private consulting firms, and neighboring communities that have undertaken similar planning projects. Conversations with ‘outsiders’ can help to identify potential planning issues and challenges not readily apparent to those living in the community. After conducting a diagnostic study, your community should be able to answer the following questions:<sup>5</sup>

1. What are some of the current planning issues in your community? Does planning appear to be a priority in your community?
2. Is planning legally required in your community? Are there minimum requirements that a plan or process must satisfy? Do you have an existing plan that meets those requirements?
3. Does the content of existing plans reflect current issues, needs, desires and facts?
4. Have existing plans been implemented? Did the implementation effort produce the desired results?
5. What is the history of planning in your community? What factors contributed to the success or failure of past projects?
6. Are there significant social, economic or political conditions present in your community that should be considered in future planning efforts?

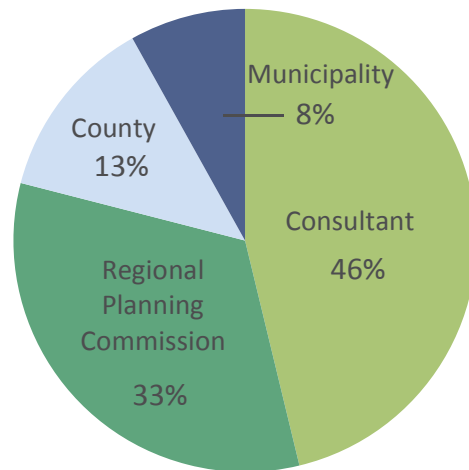
**▮ Defining the Scope of the Planning Project**

The next step is to determine the scope of the planning effort. The following questions can help you identify the audience, format and content of the plan:

1. Who is going to use the plan and how are they going to use it?
2. What are some broad topics that should be addressed in the plan?
3. What geographic area will the plan cover? Will this be a cooperative effort with neighboring communities?
4. What future time horizon will the plan address? (i.e. 10 years, 20 years, etc.)
5. What resources are available to prepare the plan (i.e. time, money, staff, etc.)? Who will prepare the plan?
6. Are you going to prepare a new plan or update an existing plan?

As part of the initial scoping process, your community should determine its budget for planning and its need for external assistance. The most common sources of planning assistance are private consulting firms, regional planning commissions, and county planning offices. If you decide to work with one of these groups, you should outline your desired scope of services in a concise request for proposals (RFP). The RFP may request a full-range of planning services or specific services such as data, mapping, survey analysis, or public process facilitation.

*Who is Responsible for Preparing Plans?*



Source: Wisconsin Department of Administration, Library of Comprehensive Plans (Last updated 1/16/12). Note: plans prepared by multiple entities were attributed to a single entity using the following order: consultants, RPCs, counties, municipalities. For example, a plan prepared by both a county and a consultant was attributed to the consultant.

<sup>5</sup> Joel S. Russell, Esq. “Diagnosing Your Community Before You Plan.” *Planning Commissioners Journal*. Number 26, Spring 1997.



*Working with Consultants***Do We Need to Hire a Planning Consultant?**

The following questions can help your community decide if it should work with a planning consultant to prepare the plan:

1. What is the issue, problem or project that your community must address?
2. What is the intended end product or result?
3. Does your community have the necessary expertise in-house? What expertise is lacking?
4. What resources are available from the county or regional planning commission (i.e. planning assistance, land information data, etc.)?
5. Would it be practical to hire permanent or temporary staff to prepare the plan?
6. What is the estimated cost of hiring additional staff compared to hiring a consultant?
7. Would hiring additional staff carry with it the possibility of a longer-term commitment than what is justified?
8. Would hiring a consultant add objectivity, prestige or credibility to the project?
9. Is there political controversy connected with the project? If so, would the presence of a consultant help to defuse it?
10. Does the project require a detached, objective or innovative approach?

**What Should We Look For?**

If your community decides to work with a consultant, it should prepare a concise request for proposals (RFP) and interview a small group of planning firms. The following criteria can help you select a qualified consultant:

**Professional qualifications.** Consultants have varying levels of staff and expertise. Review the names, titles, years of experience and work responsibilities of all staff assigned to the project. This includes staff associated with the lead consultant and all sub-contractors.

**Past experience.** Review the consultant's work experience to make sure they have a proven track record on these types of projects and can complement the experience of existing staff and officials. Desired experience may include but is not limited to:

- Grant-writing.
- Preparation of comprehensive plans or other specific types of plans.
- Experience with marketing, public relations or public participation.
- Expertise in geographic information systems (GIS) and mapping.
- Preparation of land use codes.
- Other specialized knowledge such as real estate, historic preservation, architecture or community design.

**Proposed work plan.** Review the consultant's proposal to make sure the proposed planning process, work plan, deliverables and timeline meet the unique needs of your community. Capacity to accomplish the work in the required time is often a critical issue for many local communities.

**Knowledge of local planning laws.** Review the consultant's experience working in Wisconsin. Consulting firms with limited experience in the state should be able to clearly demonstrate their understanding of Wisconsin planning laws and related requirements.

For more information on hiring a planning consultant, including preparing a request for proposals, please see: *How to Hire a Planning Consultant: A Guide to Preparing a Request for Proposals*. 2001. Haines, et. al. UW-Extension and the Wisconsin Dept. of Administration. [www.dot.wisconsin.gov/localgov/docs/landuse-hire.pdf](http://www.dot.wisconsin.gov/localgov/docs/landuse-hire.pdf)

**Designing the Planning Process**

Recognizing that the planning approach chosen by each community will differ, this chapter lays out a generic planning process. The process is broken down into three major stages with common steps and specific tasks assigned to each.

**Stage 1: Pre-Planning**

The first, and in some respects, the most important stage is ‘pre-planning,’ or preparing to plan. This stage consists of two steps: diagnosing the community and designing the planning process. Once local officials and the public understand the purpose, values and benefits of planning and agree on a process to prepare the plan, the following steps become much easier.

**Community Diagnosis**

- Determine your community’s purpose, capacity and readiness for planning.
- Inventory existing plans, studies and tools.
- Explore preliminary issues and concerns.
- Identify potential planning participants and stakeholders.
- Build capacity for planning by providing education to local officials and residents.

**Process Design**

- Establish a budget for planning.
- Determine who will prepare the plan.
- Issue a request for proposals if you will be working with a consultant.
- Establish roles, responsibilities and membership of groups involved in planning.
- Identify preferred steps in the planning process and desired end products.
- Incorporate opportunities for public participation and education.

**Stage 2: Planning**

The second stage, ‘planning’ consists of five major steps. These include: data collection and analysis; issue identification; formulating goals and objectives; selecting policies and tools; and formally adopting the plan. The planning diagram on this page shows several positive feedback loops. This is meant to illustrate that planning does not always proceed in a linear fashion. At times, your community may need to revisit or reorder steps to respond to new data or unexpected reactions to a proposal. Some flexibility should be built into the process to accommodate these unknowns. Depending on how you choose to organize the planning process, your community may also



**Simplified Planning Process**  
 The planning process can also be described as a four step process:

1. Analyzing: Where is our community now? How did we get here?
2. Envisioning: Where do we want to be?
3. Planning: How do we get there?
4. Evaluating: What progress have we made towards reaching our goals?

have more or less steps than what is shown. For example, many communities include a ‘visioning’ step. Others consider visioning a public participation technique and use it early on as a means to kick off the process. Public participation is shown at the center of this diagram to illustrate that the public should be included throughout the planning process. Chapter 4 provides additional detail on designing the public participation process.

#### Data Collection and Analysis

- Assess your community’s data and information needs.
- Gather technical and spatial data from county, regional, state and federal sources.
- Gather public opinion data through surveys, focus groups or other means.
- Analyze and interpret data, making future projections where necessary.
- Present patterns and trends to local decision-makers and the public.

#### Issue Identification

- Involve local decision-makers and the public in identifying key community issues, challenges, opportunities and desires.
- Use local data and analyses to support or identify additional issues.
- Prioritize issues to be addressed in the plan.
- Identify a vision for the future development of the community.

#### Goal and Objective Formulation

- Develop goals and measurable objectives to help attain your community’s vision.
- Develop indicators to monitor progress towards reaching goals and objectives.

#### Strategy Formulation

- Identify potential plan implementation strategies to satisfy goals and objectives.
- Evaluate impacts of alternative strategies and select preferred options.
- Recommend specific plan implementation policies, programs, actions and tools.
- Describe timeline and parties responsible for plan implementation.

#### Plan Review and Approval

- Present the plan for community residents and officials to review.
- Make changes to the plan to resolve inconsistencies or address issues of concern to local officials and the public.
- Take formal action to adopt the plan.

#### Stage 3: Post-Planning

The third stage, ‘post-planning’ consists of plan implementation, monitoring and evaluation. These topics are discussed in additional detail in Chapter 5. Options for updating the plan are provided at the end of this chapter.

#### Plan Implementation

- Adopt a specific course of action to implement the plan.
- Develop or amend local policies, programs and tools as recommended in the plan.

#### Monitoring and Assessment

- Monitor progress towards achieving stated goals, objectives and indicators.
- Review and revise plan according to schedule stated in the plan or in response to changing community needs.

A facilitator in St. Croix County works with local residents and plan commissioners to review land use maps.



Photo: Pete Kling, Town of Emerald Comprehensive Plan, 2011

## PREPARING THE PLAN

Development of local plans is typically guided by the plan commission, the governing body, or an advisory committee created by the governing body to oversee preparation of the plan. This section describes types of plans prepared by local communities and offers guidance for preparing and adopting the plan.

### ► Types of Plans

Communities prepare many different types of plans, each with a different purpose. Three general types are described below.

#### Comprehensive Plan

A comprehensive plan is a guide to the physical, social and economic development of a community.<sup>6</sup> It contains background information on the local community and a statement of overall goals, objectives, policies and programs to guide the future development and redevelopment of the community over a 20-year period. The comprehensive plan should be thought of as a central organizing umbrella under which other plans, regulations and initiatives exist.<sup>7</sup>

In Wisconsin, if a community enacts or amends a zoning, subdivision or official mapping ordinance after January 1, 2010, the ordinance must be consistent with an adopted comprehensive plan. The comprehensive plan must also address nine different topics or “elements” including:

- Issues and opportunities
- Housing
- Transportation
- Utilities and community facilities
- Agricultural, natural and cultural resources
- Economic development

- Intergovernmental cooperation
- Land use
- Implementation

While the comprehensive planning law provides a framework for the content and adoption of local plans, communities have quite a bit of flexibility in tailoring the plan to meet their needs. Individual elements can be combined or split so long as all legally required issues are addressed. Optional topics or elements can also be incorporated. For example, the comprehensive plan might address topics such as community design, air quality, energy efficiency, climate change, public health or sustainability.

#### Functional Plans

Some communities prepare functional plans that are physically separate from, but linked by policy to the comprehensive plan. Functional plans are plans that address a specific topic, such as transportation or farmland preservation, and can be analogous to the elements of a comprehensive plan. Examples of functional plans include:

- Housing plans
- Redevelopment plans
- Disaster-mitigation plans
- Historic preservation plans
- Public health plans
- Economic development plans
- Tourism and resort plans
- Public facility plans
- Capital improvement plans
- Transit plans (bus, rail, subway, etc.)
- Transportation plans (highways, roads, bikeways, trails, etc.)
- Park and recreation plans
- Open space and natural resource plans
- Farmland preservation plans

#### Spatial Plans

Lastly, many communities prepare plans that focus on a particular geographic area. These plans typically address areas that have special needs or conditions that require more detailed

<sup>6</sup> Wis. Stat. §§ 66.1001 comprehensive plan; 59.69(3) county development plan; 62.23(3) city, village or town master plan; and 66.0309(9) regional planning commission master plan.

<sup>7</sup> Duerksen, Dale and Elliot. 2009. *The Citizen's Guide to Planning*, 4<sup>th</sup> Edition. APA: Chicago.



analysis than what is provided in the comprehensive plan. Spatial plans can be incorporated into a comprehensive plan, either physically or by reference. Examples include:

- Site plans
- Neighborhood plans
- Corridor plans (travel, scenic, environmental, etc.)
- District plans (downtown, riverfront, etc.)
- Regional or intergovernmental plans

### ▮ Writing the Plan

A well-written plan is a valuable resource for citizens, local government decision-makers, consultants, and others. It can keep a planning process moving smoothly, advance policies, prevent misunderstandings, head off legal challenges, and even improve the public's perception of government. The following tips are provided to produce plans that are clear, concise, readable and accessible to a wide variety of audiences.<sup>8</sup>

### Structure and Organization

Plans should be physically organized so that you can take away major points by skimming the plan or delve in for more detailed information. Consider the following tips to add structure and organization to your plan:

- Prepare an executive summary highlighting main points from the plan.
- Include a table of contents, glossary of key terms, list of acronyms, and topical index.
- Include page numbers and chapter titles on each page.
- Use bold text, larger font sizes, or colors to denote separate levels of text.
- Use bullets, text boxes, sidebars, illustrations and white space to break up large blocks of text and highlight key ideas.
- Include cross-references to related sections of the plan or other plans and regulations.

<sup>8</sup> Adapted from: *Planning in Plain English: Writing Tips for Urban and Environmental Planners*. 2000. Natalie Macris. APA Planners Press: Chicago.

*"Plans can easily be filled with jargon, acronyms, and just plain bad writing. When that happens, the citizens who live with the plan are less likely to know what it means. In addition, jargon excludes people, creating an inside group that knows all the catch phrases and a larger outside group that does not."*

– Natalie Macris  
Planning in Plain English

### Language and Grammar

Plans must convey a large amount of technical information to a lay audience. Following are some tips to make your plan more readable and accessible:

- Use appropriate language, style and tone for your reader and purpose.
- Write at or below the eighth grade level.
- Keep sentences short and to the point. In most cases, limit yourself to one idea per sentence.
- State your main ideas clearly, answering who, what, where, when, why and how.
- Avoid planning jargon. Clarify technical terms where they must be used.
- Write active rather than passive sentences.
- Ensure agreement in lists.
- Review for spelling, grammar, word choice, and other common errors. Thorough proofreading is essential.

### Tip: Keep your plan to a readable length

If the plan is so long that nobody in your community will read it, it's too long. Lengthy plans only confuse, overwhelm and discourage the reader.

Graphics and Illustrations

Plans usually, but not always, consist of a combination of text and graphics. Graphics can be used to illustrate important points, summarize data, and convey large amounts of data quickly and concisely. They also add visual interest to a plan. Consider the following tips when including graphics in your plan:

- Include a balance of text and graphics to appeal to both visual and textual learners.
- Clearly label and explain each graphic in the text of the plan.
- Review all illustrations to make sure they are appropriate for the intended purpose and audience.
- Consider hiring a graphics consultant or editor if you have lots of illustrations.

Reviewing and Editing

Once you have completed your plan, have it independently reviewed. Select someone detached from the process that can offer constructive criticism on all aspects of the plan. This may be a planning consultant or professional editor. Also have citizens and laypersons read the plan for clarity. The review process should prompt questions that can be addressed in a revised draft.

Tip: Apply the conversation test

After you have finished writing the plan, read it aloud. Ask yourself if your intended audience would understand what you are trying to say. If your writing is stuffy, wordy or impersonal, rewrite it.

Some plans are heavily oriented towards policy and consist primarily of text. Others are oriented towards community design and the desired physical form of the community. These plans usually contain more maps, photographs and drawings. The following example from the Town of Grand Chute provides visual and text descriptions for five different desired patterns of development.

	PRESERVING NATURAL RESOURCES	MAINTAINING RURAL CHARACTER	STANDARDS FOR SUBURBAN DEVELOPMENT	STANDARDS FOR URBAN DEVELOPMENT	CREATING URBAN CENTERS
CONCEPT					
DESCRIPTION	Natural landscape with some agricultural use. Woodlands, wetlands, streams, riparian areas, prairies, and other wildlife habitat. Lands approximating or reverting to a wilderness condition, including lands unsuitable for settlement due to topography, hydrology or vegetation.	Primarily agricultural with scattered woodlands, wetlands, streams, riparian areas, prairies. Scattered buildings; sparsely-settled lands in open or cultivated states. Typical buildings are farmhouses, agricultural buildings, cabins, and farmettes/ranchettes.	Detached single-family houses surrounded by landscaped yards. Low to medium-density residential areas, adjacent to higher zones that have some mixed use, with appropriate buffers and transitions. Home occupations and outbuildings are allowed. Planting is naturalistic and setbacks are relatively deep. Blocks may be large and the roads irregular to accommodate natural conditions.	Mix of houses, townhouses and small apartment buildings and neighborhood scale commercial activity, balance between landscape and buildings; presence of pedestrians. Mixed-use but primarily residential urban fabric. A wide range of building types: single, sideyard, and rowhouses. Setbacks and landscaping are variable. Streets with curbs and side-walks define medium-sized blocks.	Shops, offices, and other workspaces mixed with townhouses, larger apartments, and civic buildings; predominantly attached buildings; trees within the public right-of-way; substantial pedestrian activity. Higher-density mixed-use buildings that accommodate retail, offices, rowhouses and apartments. A light network of streets, wide sidewalks, steady street tree planting and buildings set close to the sidewalks.
EXAMPLES					

Town of Grand Chute Comprehensive Plan 2010-2030. December 2009.  
www.grandchute.net/departments/community-development/plans-and-policies

**D Adopting or Amending the Plan**

In Wisconsin, the process to adopt or amend a comprehensive plan is outlined in state statutes.<sup>9</sup> We recommend following similar procedures for other types of plans, unless state statutes or local rules dictate otherwise.<sup>10</sup>

1. **Public participation.** Written procedures for public participation must describe methods to widely distribute proposed, alternative or amended elements of a plan, and procedures for the governing body to respond to public comments.
2. **Public notice and hearing.** At least one public hearing must be held prior to adopting or amending the plan.<sup>11</sup> Public notice requirements are described on page 15.
3. **Plan commission recommendation.** The plan commission may recommend adoption of the plan only by adopting a resolution by a majority vote of the commission.
4. **Governing body adoption.** The plan must be adopted by ordinance by a majority vote of the governing body.
5. **Publication and distribution.** Adopted ordinances and amendments must be published as a class 1 notice and take effect on the day after publication unless otherwise prescribed.<sup>12</sup> One copy of an adopted plan or amendment must be sent to the following entities:
  - The Department of Administration
  - The public library
  - The regional planning commission
  - Adjacent units of government

<sup>9</sup> Wis. Stat. §§ 66.1001(4), 62.23(3) and 59.69(3).

<sup>10</sup> Wis. Stat. § 91.10(3) requires county farmland preservation plans to follow the same procedures. Differences are noted in the text where appropriate.

<sup>11</sup> Wis. Stat. § 59.69(3)(d) requires a hearing on the county comprehensive plan to be held by the county zoning agency

<sup>12</sup> Wis. Stat. §§ 59.14, 60.80, 61.50, and 62.11(4). A class 1 notice means one newspaper publication at least one week before the act or event (Wis. Stat. § 985.07).

- Government bodies located in whole or in part within the government unit<sup>13</sup>
- The commanding officer of a military base or installation with at least 200 assigned military personnel or at least 2,000 acres, located in or near the government unit<sup>14</sup>

**Distributing the Plan**

Following are some common and innovative techniques to format and distribute your plan:

- Prepare a glossy, informational brochure highlighting main points from the plan.
- Prepare a short community video documenting the community's strengths, weaknesses and development history as described in the plan.
- Prepare and distribute a press release or other informational materials to local media and residents shortly after the plan has been prepared.
- Hang a copy of future land use maps and a summary of goals and objectives in local government meeting rooms.
- Place an electronic copy of the plan and plan summary on your local government website.
- Place hardcopies of the plan in local libraries, schools and government offices.
- Divide longer plans into two or more documents highlighting data and trends, important topics, or relevant policy recommendations.
- Publish the plan in a loose-leaf binder to facilitate easy updating.

<sup>13</sup> Wis. Stat. § 66.1001(4)(b) defines a "governmental unit" as a city, village, town, county or regional planning commission. "Governmental body" is not specifically defined but may be interpreted broadly to include special purpose units of government such as school districts, sanitary districts, lake districts, etc.

<sup>14</sup> Wis. Stat. §§ 59.69(2)(f) and 62.23(3)(b) which applies to comprehensive plans, master plans and development plans, not farmland preservation plans.

### Notice Requirements

Advance notice of a hearing to adopt or amend the plan must be provided to the following parties:<sup>15</sup>

- **Official newspaper.** Notice must be published in the community's official newspaper at least 30 days prior to the hearing. The notice must provide the date, time and place of the hearing; a summary of the plan or amendment; information on how to obtain access to the plan; and contact information for a local government employee. If a community does not have an official newspaper, it may provide notice to other media likely to give notice in the area.
- **Other news media.** Notice must also be provided in writing or by phone, fax or email to any news media that have filed a written request.
- **Interested property owners.** Notice must be provided to property owners that have submitted a written request to receive notice of action affecting their property at least 30 days prior to the public hearing. Notice may be provided by mail or another agreed upon method, and an appropriate fee may be charged.
- **Non-metallic mining interests.** Written notice must be provided to any person that has registered a marketable nonmetallic mining interest or applied for or obtained a nonmetallic mining permit at least 30 days prior to the public hearing.
- **Department of Agriculture, Trade and Consumer Protection.** Notice of the adoption or amendment of a county farmland preservation plan must be provided to DATCP for review and comment.

<sup>15</sup> Wis. Stat. §§ 19.84; 66.1001(4)(d)-(f); and 91.10(5).

## MONITORING AND UPDATING THE PLAN

### ► Monitoring the Plan

Good planning is not the result of a static document. Rather, it is a continued reflection of the plan's actual results and whether those results were satisfactory to the community. Reviewing the plan on an annual basis allows the community to take stock of current conditions, capitalize on existing assets, and take action to correct problems. Reviewing and updating the plan also creates the following opportunities:<sup>16</sup>

**Review goals, objectives and policies to address new development issues.** New issues often evolve that were not critical or foreseen when the plan was initially developed. For example, your community may be experiencing changing economic or demographic conditions or new land uses that were not contemplated in the original plan. Reviewing the plan in light of these issues allows you to assess the validity of the plan's goals, objectives and policies and make new recommendations as necessary.

#### **Review the plan for errors or outdated information.**

Most plans rely heavily on information contained in data, maps and projections. Reviewing the plan on a regular basis allows you to incorporate new data and projections and updated land use maps. It also allows you to identify and correct errors that were made in the original plan.

#### **Update the plan to incorporate new plan elements.**

Updating the plan allows you to expand existing plan elements or address new topics that were not addressed in the original plan. Emerging topics that you might wish to address include climate change, hazard mitigation, energy efficiency, sustainability, local food systems and public health.

<sup>16</sup> Adapted from: *Revisiting the Comprehensive Plan: The Six Year Review*. 2000. Maryland Office of Planning. Available: [www.mdp.state.md.us/PDF/OurProducts/Publications/ModelsGuidelines/mg20.pdf](http://www.mdp.state.md.us/PDF/OurProducts/Publications/ModelsGuidelines/mg20.pdf)



Revise the plan concurrent with other local planning efforts. Reviewing the plan on a concurrent basis with other plans and programs allows you to identify inconsistencies and make use of limited resources to update multiple plans or programs. For example, many communities are currently reviewing their comprehensive plans in light of new shoreland management standards, farmland preservation plans, and other planning programs.

*“Planning is a continuous process. Your plan should be thought of as a living document, continuously changing as it passes through the different life stages of creation, implementation, and update or revision.”*

– Schmidtke and Wegmann

A Guide to Preparing the Intergovernmental Cooperation Element of a Comprehensive Plan

### ► Updating the Plan

A number of different options exist for updating local plans. Three options are presented here along with pros and cons of each.<sup>17</sup> Factors to consider when deciding how to update your plan include the structure and organization of the current plan, the extent to which the plan is outdated, and the time and resources your community is willing to devote to a plan update. The update should build off of an evaluation of the original plan – what works, what does not, and what has changed. Even with a 10-year-old plan, you may find that much of the content is still relevant.

### Option 1: Write an Entirely New Plan

Sometimes the best approach is to replace the current plan with an entirely new document. The new document may reference or use some of the old information, but otherwise, is an entirely new document integrating old and new content in a coherent fashion. To retain some degree of connection to the earlier plan, the plan might discuss what policies and strategies were revised and why.

Writing a new plan avoids the time-consuming and sometimes tedious task of trying to revise existing plan language and incorporating new components so that they work with existing ones. It may be particularly appropriate if your current plan lacks coherent organization or has other major problems.

A disadvantage of this approach is that it involves a considerable amount of time and resources. Communities that decide to undertake a complete rewriting of their plan should try to focus on the strengths of the existing plan and incorporate lessons learned from previous planning processes.

### Option 2: Selectively Update the Old Plan

Rather than writing an entirely new plan, some communities opt to selectively revise and update specific sections of their plan. This approach has the advantage of focusing the plan update on those portions of the plan that truly need updating. It is generally more cost-effective and less time consuming than a total rewrite.

The focus of an update may be providing new data, maps or projections, revising plan goals or objectives, or updating the plan’s implementation strategy. The revised plan should document what changes were made and why.

Selectively updating an existing plan works best when the plan being updated is well-written and organized. If the original plan has significant weaknesses in organization or

<sup>17</sup> Adapted from: *Updating Your Comprehensive Plan*. Maine State Planning Office. May 2003. Available: [www.maine.gov/spo/landuse/docs/compplanning/updatemanual.doc](http://www.maine.gov/spo/landuse/docs/compplanning/updatemanual.doc)

content, using it as a template for an update may merely perpetuate the earlier plan's weaknesses.

Conversely, selectively revising an existing plan may have the effect of hampering efforts to take a fresh look at issues or problems or embrace new policies. For example, a community may opt to leave existing plan language alone, even though it is of limited usefulness or relevance. Selectively updating and revising existing language can be more cumbersome than rewriting a plan and has the potential to lead to a less coherent product.

### Option 3: Prepare a Plan Addendum

Some communities evaluate their existing plans and determine that they are working quite well. Instead of substantially revising the existing plan or writing a whole new one, your community may choose instead to develop a plan "addendum" that highlights the information and policies that have been changed from the existing plan. Under this approach, the original plan is retained in its current form and the addendum serves as an appendix or supplement to the original.

This may be the easiest and least costly approach to updating the plan. It allows the community to build on its current plan, but avoids the need to integrate new information into an existing document. It also provides the community with flexibility to organize the

addendum in a way that seems most effective and user-friendly.

Unless carefully structured, this approach could result in an overall format that is difficult or confusing to use. The reader may need to jump back and forth between the original plan and the addendum to ascertain what information is still current and what policies are still in force. This limitation might be overcome by making the addendum a more comprehensive distillation of relevant policy-related components from the previous plan. Preparing a plan addendum is an appropriate choice if your existing plan is relatively recent and effective, but you wish to make minor adjustments or focus in on a particular issue or topic area.

#### How Frequently Should You Update the Plan?

According to state law, a comprehensive plan must be updated at least once every ten years. Likewise, a county farmland preservation plan must be recertified every ten years. Other plans may be updated at the discretion of local units of government. We recommend reviewing local plans on an annual basis to determine if and when updates are needed.

*Wis. Stat. § 66.1001(2)(i)*

*Wis. Stat. § 91.16(2)(a)*

### Two Scenarios: Reflecting on Planning

Think of two examples of poor development – these could be in your community or a neighboring community. What is the problem with the development? Why was it approved? Who was harmed by the development? Who benefitted?

Think of two Wisconsin communities that have a distinctive character. How would you describe that character? What factors (historic, political, environmental, etc.) helped shape each community? What role did planning play in this process?

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**RECOMMENDED RESOURCES****Planning**

*Guide to Community Planning in Wisconsin.* Brian W. Ohm. 1999. 275 pages. Department of Urban & Regional Planning, University of Wisconsin-Madison/Extension. Available online: [www.lic.wisc.edu/shapingdane/resources/planning/library/book/contents.htm](http://www.lic.wisc.edu/shapingdane/resources/planning/library/book/contents.htm)

*Comprehensive Planning and Citizen Participation.* 2006. 72 pages. Grabow, Hilliker and Moskal. UW-Cooperative Extension Publishing. G3810. Available: <http://learningstore.uwex.edu>

**Comprehensive Planning Elements**

The following comprehensive planning element guides are available electronically from the Center for Land Use Education: [www.uwsp.edu/cnr-ap/clue/Pages/ComprehensivePlanning.aspx](http://www.uwsp.edu/cnr-ap/clue/Pages/ComprehensivePlanning.aspx) or the Wisconsin Department of Administration: [www.doa.state.wi.us](http://www.doa.state.wi.us) (keyword: comprehensive planning). Some guides may also be available in print by contacting the authoring organization.

*Housing Wisconsin: A Guide to Preparing the Housing Element of a Local Comprehensive Plan,* 2<sup>nd</sup> edition. Brian W. Ohm, John Merrill, Joni M. Herren and Erich Schmidtke. 2003. 79 pages. UW–Extension.

*Transportation Planning Resource Guide: A Guide to Preparing the Transportation Element of a Local Comprehensive Plan.* 2001. 86 pages. Wisconsin Department of Transportation.

*Planning for Agriculture in Wisconsin: A Guide for Communities.* Douglas Jackson-Smith. 2002. 97 pages. UW-Cooperative Extension and Wisconsin Department of Agriculture, Trade, and Consumer Protection.

*Planning for Natural Resources: A Guide to Including Natural Resources in Local Comprehensive Planning.* Brian W. Ohm, et. al. 2002. 85 pages. UW–Madison/Extension and Wisconsin Department of Natural Resources.

*A Guide to Smart Growth and Cultural Resource Planning.* Richard A. Bernstein (Ed). 2003. 66 pages. Wisconsin Historical Society.

*A Guide to Preparing the Economic Development Element of a Comprehensive Plan.* 2003. 54 pages. Wisconsin Economic Development Institute, Inc.

*Intergovernmental Cooperation: A Guide to Preparing the Intergovernmental Cooperation Element of a Local Comprehensive Plan.* Erich Schmidtke and Jonquil Wegmann Johnston. 2002. 77 pages. Wisconsin Department of Administration.

*Land Use Resource Guide: A Guide to Preparing the Land Use Element of a Local Comprehensive Plan.* Anna Haines, et. al. 2005. 124 pages. Center for Land Use Education.

*Implementation Element Guide: A Guide to Preparing the Implementation Element of a Local Comprehensive Plan.* Anna Haines, Amy Emery, Kassandra Walbrun and Larry Ward. 2006. Center for Land Use Education.

*Wisconsin Comprehensive Planning Implementation Guide Toolkit*. 2007. Available online or in CD format by contacting the Wisconsin Department of Administration at (608) 267-3369.

### Working with a Consultant

*How to Hire a Planning Consultant: A Guide to Preparing a Request for Proposals*. Anna Haines, Merritt Bussiere, Kassandra Walbrun and Jonquil Wegmann Johnston. 2001. 56 pages. Available online: [www.dot.wisconsin.gov/localgov/docs/landuse-hire.pdf](http://www.dot.wisconsin.gov/localgov/docs/landuse-hire.pdf)

*Sample Agreement for Consultant Services for Developing a Comprehensive Plan*. Thomas W. Harnisch. No date. 28 pages. Wisconsin Towns Association. Available online: [www.doa.state.wi.us/dir/documents/ExampleAgreement\\_WTA.pdf](http://www.doa.state.wi.us/dir/documents/ExampleAgreement_WTA.pdf)

### Data Resources

Wisconsin Department of Administration, Demographic Services – [www.doa.state.wi.us](http://www.doa.state.wi.us)  
Contains population and housing estimates and projections for all Wisconsin towns, villages, cities and counties.

Applied Population Laboratory, GetFacts – <http://getfacts.wisc.edu/mapping.php>  
Contains thousands of Wisconsin demographic and economic variables at state, county and local government levels.

American Fact Finder – <http://factfinder2.census.gov>  
The data dissemination tool for accessing and mapping American Community Survey, Decennial Census, and other U.S. Census data.

### Mapping Resources

*Citizen's Guide to Future Land Use Mapping*. Douglas Miskowiak. 2006. 32 pages. Center for Land Use Education. [www.uwsp.edu/cnr/landcenter/pubs-bulletins.html](http://www.uwsp.edu/cnr/landcenter/pubs-bulletins.html)

Wisconsin Land Information Clearinghouse – [www.sco.wisc.edu/wisclinc](http://www.sco.wisc.edu/wisclinc)  
Wisconsin Local Government Web Mapping Sites – <http://coastal.lic.wisc.edu/wisconsin-ims/wisconsin-ims.htm>  
Wisconsin DNR, Planning Data and Maps – <http://dnr.wi.gov/org/es/science/landuse/plan/data.htm>

### Survey Resources

*Designing & Conducting Survey Research*. Louis Rea and Richard Parker. 2005. 283 Pages. Jossey-Bass. May be ordered at libraries and bookstores or online: [www.planning.org/apastore](http://www.planning.org/apastore)

*How to Conduct Your Own Survey*. Priscilla Salant and Don Dillman. 1994. 232 Pages. John Wiley & Sons. May be ordered at libraries and bookstores or online: [www.planning.org/apastore](http://www.planning.org/apastore)

University of Wisconsin Survey Center – [www.uwsc.wisc.edu](http://www.uwsc.wisc.edu)  
UW-River Falls Survey Research Center – [www.uwrf.edu/src](http://www.uwrf.edu/src)  
UW-Milwaukee Center for Urban Initiatives & Research – [www.uwm.edu/Dept/CUIR](http://www.uwm.edu/Dept/CUIR)



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## SAMPLE PLANNING DOCUMENTS

### Sample Goals, Objectives and Policies

In this section, the goals, objectives, and policies for each of the Comprehensive Plan's nine major elements are presented. Definitions for goals, objective and policies are given below.

**Goal:** An **ideal future condition** to which the community aspires. It is usually expressed in general terms and is not quantifiable.

**Objective:** An **intermediate step** toward attaining a goal that is measurable and attainable.

**Policies: Principles of land use design and management of development** derived from the goals and aimed specifically at what the Village of Campbellsport can do to attain the goals. Policies typically use "shall" and "should" in describing actions and are often expressed as specific standards.

*From the Agricultural, Natural, and Cultural Resources Element*

#### **Goal**

To conserve, protect, and improve the agricultural, natural, and cultural resources of the Village of Campbellsport and the surrounding area.

#### **Objectives**

1. Ensure that the environmental and aesthetic qualities of the community are considered when planning for future development.
2. Protect environmentally sensitive areas such as floodplains, drainageways, wetlands, and wooded areas from urban development.
3. Develop and adopt a stormwater management plan.
4. Mapping of environmentally sensitive areas and wildlife habitat areas should be consulted during the review of proposed developments.
5. Be actively involved in maintaining the attainment designation for air quality.
6. Be proactive in the preservation and restoration of historically significant structures and buildings.
7. Develop a site plan review process to help maintain and improve the visual quality and physical design of the Village of Campbellsport.

#### **Policies**

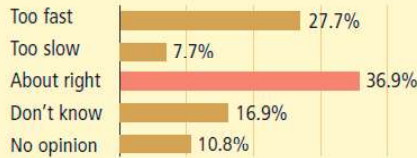
1. The Village of Campbellsport shall use zoning and shoreland-wetland ordinances to protect environmentally sensitive areas from urban development.
2. The Village of Campbellsport shall use the Site Plan Review Process to review all multi-family residential, commercial, and industrial developments.

Sample Community Survey Results

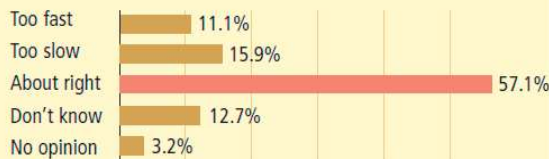
Town of Rock Elm

Community Attitudes Survey • HIGHLIGHTS

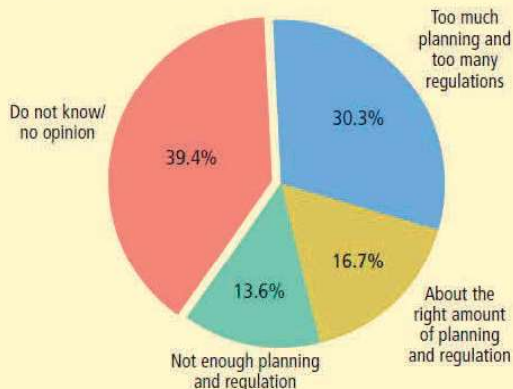
How would you describe the pace at which development is occurring in PIERCE COUNTY?



How would you describe the pace at which development is occurring in the TOWN in which you live?



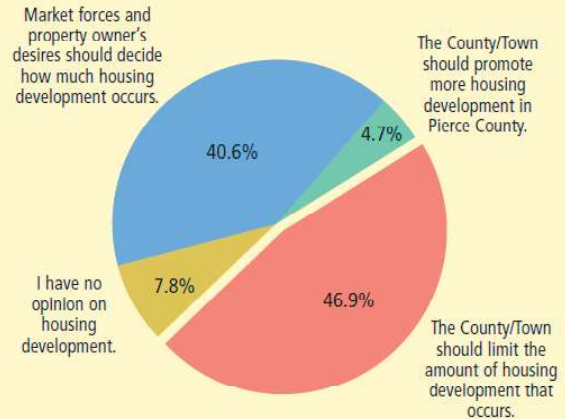
How would you rate current efforts by PIERCE COUNTY to regulate and guide development?



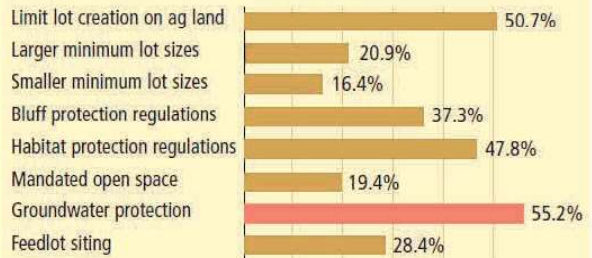
How would you rate current efforts by your TOWN to regulate and guide development?



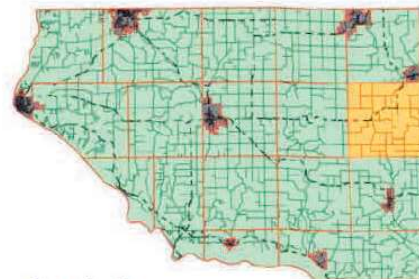
Which of the following statements best reflects your opinion of where new housing should be located in the County?



What additional land use regulation would you support?



NOTE: Results are based on Town data only – survey excluded cities and villages.



Town of Rock Elm

Number of surveys mailed: 216  
Number of surveys returned: 69  
Response rate: 31.9%

Rock Elm Township Comprehensive Plan, 2011, Community Attitudes Survey. Available: [www.co.pierce.wi.us/Land%20Management/Comp\\_Plan-Final/Town\\_Comp\\_Plans/Rock\\_Elm\\_Comp\\_Plan.pdf](http://www.co.pierce.wi.us/Land%20Management/Comp_Plan-Final/Town_Comp_Plans/Rock_Elm_Comp_Plan.pdf)