

# CHARTING THE COURSE

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## Creating a Plan for Cary

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*Proposed  
Approach  
and Process*

*Draft  
May 21, 2012*

*Exhibit A  
WS 5/24/12*

# Creating a New Community Plan

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## *Proposed Approach and Process for the Town of Cary*

Draft

May 21, 2012

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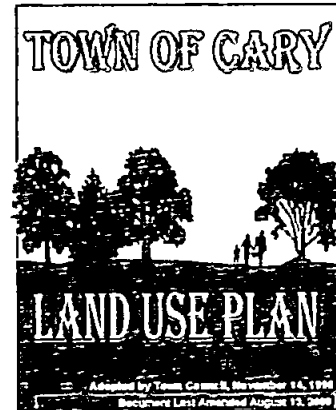
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# 1. Introduction

## A. Project Background

This report proposes an approach to updating Cary's 1996 Land Use Plan, and creating in its place a new Cary Community Plan

In late 2010, the Town of Cary began considering the need to update several of the Town's existing area plans (components of the overall Land Use Plan), along with the idea of developing additional area plans to address growing development needs in the town. After evaluating the area plan requests, it became clear that a more pressing need was to undertake a comprehensive update to the entire Land Use Plan rather than updating the individual area plans. As a result, in 2011, the Cary Town Council directed the Town's Planning Staff to pursue a complete update of the Town's current Land Use Plan.



Due to the complexity of the undertaking, the Town decided to approach this initiative in two distinct phases:

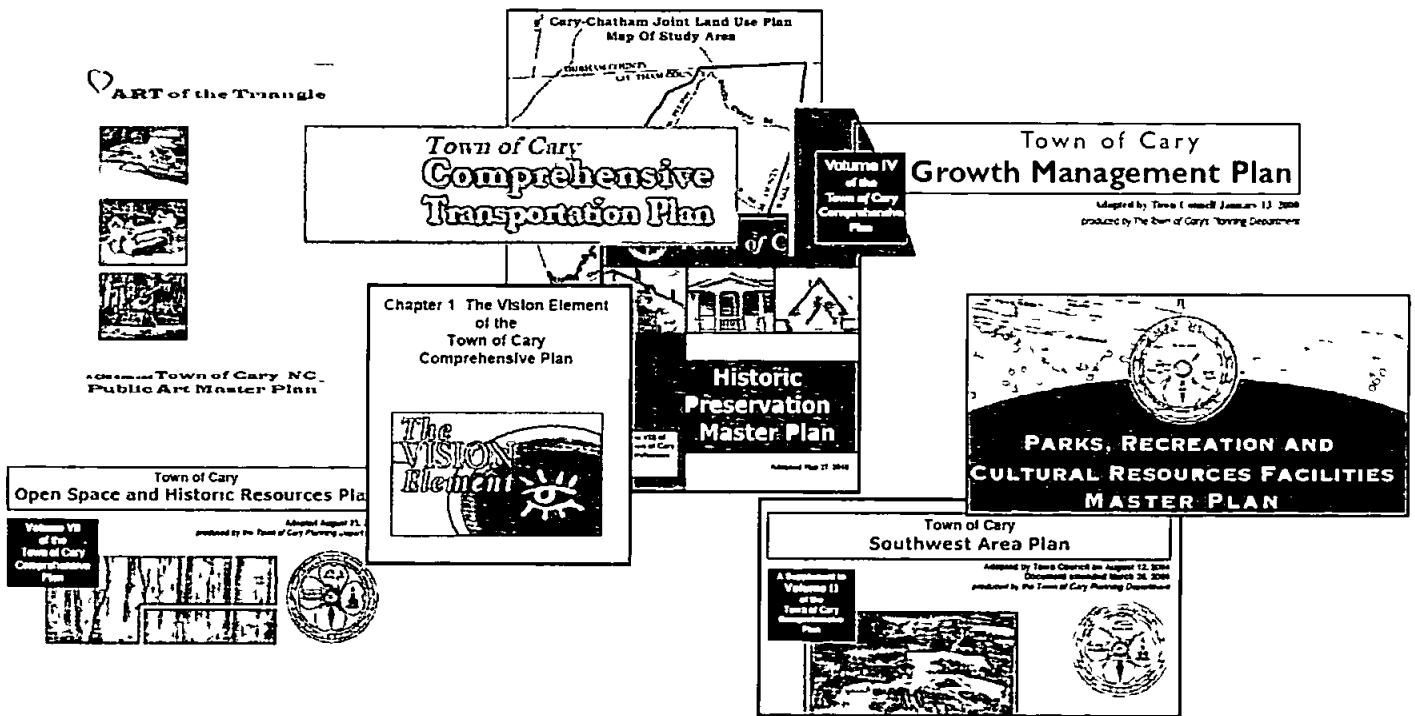
1. The first phase - Phase I - is designed to focus on community outreach, initial project branding, and the development of a potential framework for the new Plan. This will identify the scope of the project, determine the expectations of Town government stakeholders, develop a detailed workplan and project approach, and develop an outline of the desired overall form and format of the new Plan.
2. Phase II, which will follow, will focus on the actual preparation of the new Plan, based on the framework established in Phase I. The process of preparing the plan will use the outreach and engagement strategies developed in Phase I.

Clarion Associates, in coordination with ACP Visioning + Planning, Martin/Alexiou/Bryson, and Dr. David Godschalk, has been retained by the Town to assist in completing these Phase I tasks. This report presents the ideas and recommendations that have been developed. Recommendations presented here result from a collaborative dialogue among the Town Council, Town Staff, the Consulting Team, citizens, and stakeholders.

## B. Options and Recommendations

This report reviews a considerable body of information, including growth and demographic trends, policies, and current best thinking about Cary's future. The purpose of the report is to suggest an approach to creating a Community Plan for Cary. This report offers four alternative options for how to go about creating this new plan - - from the most basic alternative (refreshing and updating the existing Land Use Plan) to preparation of a fully integrated Comprehensive Plan.

One of the compelling reasons to go beyond a simple update of the existing Land Use Plan is that there are so many issues in Cary, and so many plans, that need to be coordinated



The key recommendation is to create a new policy document, a Community Plan, that will have embedded within it an updated Land Use Plan, but will also “connect the dots” and include linkages to Cary’s other issue-specific plans and policy documents. A new Community Plan can blend together those current Comprehensive Plan components that deal directly with land use, and create placeholders for related future initiatives to subsequently come within the policy umbrella created here. The recommendation is to construct a document now, with this new Community Plan, that over time becomes a one-document Comprehensive Plan for the Town of Cary that ultimately unifies all related plans and policy documents.

### **C. Organization of this Report**

This report is organized in five major sections. The first discusses existing conditions and the need for this initiative. Building on that first section, the second section synthesizes key ideas that have been discussed for creating a new plan, and reviews the status of current Comprehensive Plan components to assess the extent to which each component addresses which pieces of the large picture. Following is a series of options for how to structure a new Community Plan, with discussions of advantages and disadvantages of each option. Each option is illustrated with a preliminary table of contents for what might be included in the new plan if that option were to be pursued. The next section focuses on community outreach. This section discusses branding for the initiative as well as suggestions for citizen engagement strategies that will be implemented in

Phase II to ensure robust public engagement in the preparation of this new Community Plan. The last section focuses on resources the Town will need when moving into Phase II, suggesting a management structure along with discussion of required levels of staff commitment and budget considerations for preparation of the plan. An Appendix provides an Annotated Summary of the Town’s Existing Policies and Plans, copies of the staff and consultant presentations that have been prepared in this process to date, examples of Plan Summaries from other communities that can be considered for approach and format, and a suggestion for citizen engagement technique that was successful in another community (suggested for consideration by an Advisory Board member)

The intent of this report is to describe existing circumstances and set the stage for a new initiative in Cary to create a new Community Plan

## 2. Existing Conditions

### A. Cary’s Current Land Use Plan

Cary’s Comprehensive Plan is comprised of eight separate volumes, each of which has been adopted separately at varying times over the preceding decades (see table at right). The Land Use Plan is the second volume of the Comprehensive Plan and has seven associated area plans that address land use, transportation, parks, and greenways considerations in specific areas of the town, plus an 8<sup>th</sup> recently-prepared Chatham Cary Joint Land Use Plan. The Land Use Plan presents the Town’s declaration of its official policy with regard to the form and pattern of future development.

First adopted in 1996, the Land Use Plan is the oldest volume of the Comprehensive Plan. Since then, development changes in the town have caused much of the information in the Land Use Plan to become outdated. The Land Use Plan Map has been updated and amended over time, and the eight individual plans have been prepared, but it has been over 15 years since the Town has taken a comprehensive look at its land use vision and policy framework. A key disadvantage of this approach is missed opportunity for connectedness between related issues, and a missing overall context for the construction of individual plans.

Cary’s Comprehensive Plan		
Volume No	Plan Name	Date of Adoption & Updates
Vol 1	Vision Element	2004
Vol 2	Town-Wide Land Use Plan	1996
Special Area Plans	1 Southeast Area Plan	1998, 2004
	2 Town Center Area Plan	2001
	3 Northwest Area Plan	2002
	4 NW Maynard Area Plan	2003
	5 Southwest Area Plan	2004
	6 Walnut Street Corridor Plan	1998, 2002
	7 Carpenter Community Plan	2005
	8 Chatham-Cary Joint Plan	2012
Vol 3	Parks and Recreation Master Plan*	1998, 2003
Vol 4	Growth Management Plan	2000
Vol 5	Affordable Housing Plan	2000, 2010
Vol 6	Comprehensive Transportation Plan	2001, 2008
Vol 7	Open Space Plan*	2001
Vol 8	Historic Preservation Master Plan	2010
*2001 Open Space Plan and 2003 Parks and Recreation Master Plan being replaced with new 2012 Parks, Recreation, and Cultural Resources Master Plan		

## **B. Growth Trends and Demographics**

Along with the age of the current Land Use Plan, the Town's changing demographics and growth trends are other driving motivations behind this effort to create a new Community Plan. Addressing these new trends and changing realities through new visioning and planning in the Town's policy documents is important as new policies and strategies in the new Community Plan will allow the Town to respond to these trends and continue to meet the needs of its citizens.

To help document the extent of the changing demographics, the Town's Planning Staff has compiled information describing demographic data and growth trends in Cary. Some of the key highlights of this compilation are noted below. A more complete picture of the Town's changing demographics is included in Appendix B, in a presentation that Staff prepared for and presented to the Town Council in January, 2012.

- Cary's population has more than quadrupled in the last 20 years,
- There are substantially more people who are foreign-born living in Cary, specifically of Hispanic and Asian origin,
- Cary's population has been getting older. The Town's median age is the third highest among the larger cities of North Carolina,
- The town has a smaller percentage of people between the ages 20-29 than data show for the national, state, or county, and a higher percentage of people between ages 40-49 than the national, state, or county average, and
- The number of Cary households with people 65 and older is increasing, as is the number of householders living alone.

These demographic shifts have important implications for the Town's growth and development patterns moving into the next decade. Changing demographics mean a change in housing and transportation preferences, including an increase in the need for a variety of options and modes, as well as changing preferences in Town amenities, services, and infrastructure. As a result, new policies and strategies should be developed in order to ensure the Town's continued vitality and success.

## **C. Development and Redevelopment**

The other major consideration that has prompted the need for preparation of this new Community Plan is the fact that the Town's ultimate geographic growth limits are set and the Town is now largely built out. Over the last 30-40 years, the vast majority of Cary's growth has been "greenfield" development (new development on previously undeveloped land), and Cary's current Land Use Plan and most of the special area plans have had a particular focus on development in greenfield areas. Within a decade or so, however, the last of Cary's greenfield areas will be almost gone. The Town will need to transition from a community traditionally focused on new development, to one that will need to consider more infill and redevelopment strategies throughout the town.

Cary has already begun to see this shift in focus, as Town Staff and the Town Council have recently encountered or experienced

- Requests from the regional transit agency to begin long-range Transit-Oriented Development (TOD) master planning for infill and redevelopment areas around four potential future light rail transit stations, and requests by Planning Board members for official TOD design standards,
- Several high-profile and controversial rezoning requests for infill multifamily housing,
- The loss of some anchor tenants from highly-visible, first-generation shopping centers, with associated community demands for Council action to ensure that they remain vibrant,
- Increased numbers of development inquiries for both large and small infill sections or parcels in Cary,
- Requests to pro-actively plan for two mixed-use activity centers near freeway interchanges,
- Calls by Town Council members to develop land use strategies along older sections of several major boulevards/thoroughfares,
- Requests by public officials to address issues posed by aging, first-generation suburban apartment complexes of the 1960's-70's,
- Requests by public officials and residents to improve Cary's older neighborhoods, and
- Requests to simplify and restructure the Land Use Plan and its area plans, including removal of duplicate material and consolidation of plan maps

Accordingly, neighborhood stabilization and succession, the maintenance of older neighborhoods and employment centers, development along emerging transit lines/corridors, and the sustainability of Cary's economy will be important considerations for the new Plan. The changing (aging) demographic profile portends a shift in housing demands. The conservation of neighborhood character in older neighborhoods abutting new development areas will be an important objective. Land use patterns will change in response to market demands and mobility opportunities as new transit corridors are developed. And alongside all these changes is the evolving fiscal picture for the Town itself, with attention needed to changing service demands and revenue sources to assure a continued economic vitality.

The Appendices to this report contain more detail about these topics. Appendix A summarizes the array of existing policies and plans that have been adopted by the Town of Cary, with notes about components of these policies and plans that are particularly relevant to this new Community Plan initiative.



Appendix B contains presentations that were made to the community during both internal and external public information and stakeholder meetings in March 2012, to help describe the existing conditions and possibilities. The first presentation was prepared by Town Staff and highlights facts and trends. The next two presentations, prepared by the consultant team, focus on community engagement options and current “best practices” used to develop Land Use Plans and Comprehensive Plans.

### 3. Approach to Creating a Community Plan for Cary

The Cary Town Council engaged in a discussion at its annual retreat in January, 2012, to consider approaches to a new planning initiative that would take a comprehensive look at Cary and its future. At the retreat, Town Council members discussed the need to update Cary’s existing Land Use Plan and ideas for how that initiative might be structured. Presentations and discussions focused not just on the plan itself but also on the process for creating a plan, and on goals for the ultimate outcome of this effort.



#### A. Overall Direction

Council Members identified four characteristics that should be embedded in the new plan, the plan should be strategic, clear, overarching, and flexible.

- Strategic The plan must be economically feasible and rooted in the realities of changing demographics, market realities, and fiscal soundness. The plan should serve as a foundation for economic prosperity for the Town.
- Clear The new plan should be graphically clear, easy to understand, and of use to the general public. To ensure ease of comprehension and availability, multiple formats of the plan should be available for easy dissemination to the general public.
- Overarching The plan should serve as a bridge between different functions and plans. It should be integrated with the Town’s other relevant plans and policies and it should be comprehensive enough to ensure wide-spread implementation and instill confidence in the policies and goals set forth therein.

- **Flexible** The new plan must be adaptable, but lasting, in order to accommodate changing technologies, demographics, and markets. Some changes or amendments might be necessary in the next few years, but the plan should be able to provide guidance to the community for years to come.

Council Members also emphasized the importance of the planning process in the creating the new plan, wanting to ensure that the process is both inclusive as well as focused.

- **Inclusive** It is critical that there is diverse and multi-generational engagement in the planning process. Reaching out to people from different socio-economic levels, different racial and religious backgrounds, and age groups should be an important step in the development of the new Plan.
- **Focused** The planning process should also be simple and easily understood by everyone. It should be targeted and strategic, so that the process is not painful for the stakeholders who choose to be involved.

Members also voiced hope that the process be inspirational and unique, as well as sustainable.

- **Inspirational and Unique** The finished product should be associated with a strengthened "Cary Brand" that recognizes Cary's established character and potential for an even stronger sense of place—incorporating quality of life, open space, natural environment, and safety considerations into the plan.
- **Sustainable** The outcome should lead to development of a plan for an attractive place for investment, both by individuals and businesses, provide the ability to be able to continue to provide high quality services and facilities, and provide for strong emotional attachment to the community from residents.

## **B. Key Topics and Existing Plan Elements**

To help set a framework for review Cary's existing array of Comprehensive Plan elements, and to help set the stage for designing the approach to creating this new plan, six topics have been identified to organize thinking about planning issues. Most, if not all issues to be addressed in this new Cary Plan fall into one or more of these six key topics. The topics are:

Built Environment	Community Life	Transportation and Mobility
Natural Environment	Parks and Recreation	Economic and Fiscal Issues

Following is the list of Cary's existing Comprehensive Plan elements, arranged in chronological order of initial date of adoption (with reference to volume # in the existing Comprehensive Plan)

1996	Land Use Plan (Vol 2)	2004	Vision Element (Vol 1)
2000	Growth Management Plan (Vol 4)	2008	Comprehensive Transportation Plan (Vol 6)
2001	Public Art Master Plan (Not currently p/o Plan)	2010	Historic Preservation Master Plan (Vol 8)
2001	Open Space & Historic Resources Plan (Vol 7)	2010	Affordable Housing Plan (Vol 5)
2003	Parks and Recreation Master Plan (Vol 3)		

The following table suggests how each of these existing Plan Elements relates to each of the key topics. This organization of the ideas that are currently in place helps set the stage for suggestions about how to structure the new Community Plan.

**Cary's Existing Priority Issue Topics:**

**HOW EXISTING PLANS RELATE TO CURRENT KEY TOPICS**

KEY TOPICS ADOPTED PLAN	Built Environment	Community Life	Transportation & Mobility	Natural Environment	Parks and Recreation	Economic and Fiscal
	Urban Form, Housing, Infrastructure, Historic Form	Neighborhoods, Family-Friendly	Complete streets, Transit, Connectivity	Sustainability, Open Space, Water Resources, Energy	Parks, Recreation, Arts, Culture	Fiscal Sustainability, Redevelopment
The Vision Element - 2004	●	○	○	○		○
Land Use Plan - 1996	●	○	○	○	○	○
Parks, Recreation & Cultural Resources Master Plan - 2003		●		○	●	
Waste Management Plan - 2000	●		○	○		○
2020 Affordable Housing Plan - 2010	●	○				○
Comprehensive Transportation Plan - 2008	●		●	○		○
Open Space and Historic Resources Plan - 2001				●	○	
Historic Preservation Master Plan - 2010	○	○			○	○
Public Art Master Plan - 2001	○	○			○	

Table Notes

- Blank = The plan does not mention the topic at all
- = The plan mentions the topic and includes one or two goals or objectives
- = The plan discusses the topic in depth, listing many goals and objectives

## 4. Options for the Structuring the New Plan

One of the purposes of this report is to outline alternative options for the structure of and approach to this new plan. The Town could decide to simply update the current Land Use Plan (Volume #2 of the eight current volumes of Cary's Comprehensive Plan), or update the Land Use Plan while folding together several other Comprehensive Plan components, or possibly create a completely new and fully integrated Comprehensive Plan. This section of the report describes four alternative options for consideration, followed by recommendations.

### A. Description of Options

Building on this review of important topics for Cary, on the existing array of plans and policies, and on the Council and community discussions to date about what most needs attention in this new Community Plan, there are four proposed options for creating a new Community Plan for Cary. These four options range from a focused Land Use Plan Update - which would be the most simple and direct of the needed tasks - to a preparation of a completely integrated new Comprehensive Plan (which would include a fully inclusive array of topics). These four options are elaborated upon here:

#### Option A Limit to Land Use Plan Update

Update the existing Land Use Plan, incorporating the seven existing Area Plans

#### Option B Incorporate Vision, Growth Management, Chatham Cary Joint Land Use Plan, Affordable Housing, And Historic Preservation Plan

Several of the existing volumes of Cary's Comprehensive Plan have been prepared by the Planning Department with consideration of land use linkages, and could be folded into the new Community Plan (and accordingly deleted as independent volumes). Inclusion of the new Chatham Cary Joint Land Use Plan can also be a part of this option.

#### Option C Add New Key Topics Not Currently Addressed

In addition to the components folded into the new plan described in Option B, this option would introduce new topic areas intended to focus on linkages between issues.

#### Option D Preparation of a Complete Comprehensive Plan

Prepare a new, fully integrated Comprehensive Plan

Proposed Community Plan for the Town of Cary

Each of these options is discussed in the following pages. Each starts with a description of how that option would be approached, followed by a brief discussion of the benefits and disadvantages of that option and a proposed table of contents. All are viable options. Options B and C strike the best balance between need for comprehensiveness vs. timeliness/cost concerns.

The table below summarizes the four options by indicating which topics would be included in each individual option. Public engagement considerations follow in Section 5.

	Plan Name, Element, or Topic	Plan Update Options			
		A	B	C	D
Vol 1	Vision Element (2004)		●	●	●
Vol 2	Town-Wide Land Use Plan (1996)	●	●	●	●
	<b>Area Plans</b>				
	1 Southeast Area Plan (2004)				
	2 Town Center Area Plan (2001)				
	3 Northwest Area Plan (2002)	●	●	●	●
	4 NW Maynard Area Plan (2003)				
	5 Southwest Area Plan (2004)				
	6 Walnut Street Corridor Plan (2002)				
7 Carpenter Community Plan (2005)					
8 Chatham-Cary Joint Land Use Plan (2012)		●	●	●	
Vol 3	Parks, Rec, and Cult Resources Master Plan (2012)		○	○	●
	Public Art Master Plan (2012)		○	○	●
Vol 4	Growth Management Plan (2000)		●	●	●
Vol 5	Affordable Housing Plan (2010)		●	●	●
Vol 6	Comprehensive Transportation Plan (2008)		●	●	●
Vol 7	Open Space Plan (2001), To be deleted in 2012	—	—	—	—
Vol 8	Historic Preservation Master Plan (2010)		●	●	●
<b>Additional Plans Already Adopted by Cary</b>					
	Water Distribution System Plan (2009)			○	●
	Wastewater Collection System Plan (2012)			○	●
	Reclaimed Water System Master Plan (2012)			○	●
	Long Range Water Resources Plan (2012)			○	●
<b>Comprehensive Plan Topics Not Yet Addressed by Cary</b>					
	Redevelopment			●	●
	Sustainable Neighborhoods			●	●
	Community Facilities and Infrastructure			●	●
	Energy Conservation, Renewable Energy			●	●
	Fiscal Sustainability and Economic Development			●	●
	Community Health and Safety				●
	Green Infrastructure, Green Building				●
	Waste Stream Reduction, Re-use				●
<b>Key</b>					
●	Incorporate and update entire plan element into the new Community Plan				
○	Do not incorporate existing plan document, but cite by reference, and summarize its goals, policies, and strategies, for integration with other plan elements, priorities				

In this array of alternative approaches, Options C and D take a more comprehensive approach to drafting the new Community Plan. These options represent a more integrated and coordinated approach to land use planning, by proposing a more diverse set of elements in addition to traditional elements such as land use, transportation, and the natural environment. The table below explains what issues would be addressed with each of these additional elements.

Additional Elements that could be added to the new Community Plan

<b>Redevelopment</b>	As the Town's population grows, and as the amount of undeveloped land in Town shrinks, some older areas provide important opportunities for redevelopment to similar or possibly more intensive uses. This element would set forth strategies and targets for managing redevelopment in designated areas throughout the Town and provide a framework for improvements over time. Adding this as an element to the plan would allow for a more focused discussion on the topic.
<b>Sustainable Neighborhoods</b>	Cary is well known for the quality and vitality of its neighborhoods. But circumstances that could represent threats to neighborhood character are emerging. Adding this element would give the Town the opportunity to look at housing issues and plan for changing demographics, aging housing stocks, housing diversity, and housing supply, in order to ensure that the vitality of individual neighborhoods is maintained. It would also provide the opportunity to look at enhancements to neighborhoods, such as sidewalks, parks, road connections, and public art.
<b>Community Facilities &amp; Infrastructure</b>	An Infrastructure Element would address the Town's basic public infrastructure and public facilities, and help set priorities for investment. It would complement the Town's existing CIP by establishing policies that promote the delivery of efficient, high quality services, including energy, waste, stormwater, libraries, public safety, fire, communications, and public works and coordinating land use decisions with the community infrastructure decisions.
<b>Energy Conservation &amp; Renewable Energy</b>	Adding this element to the plan could help focus attention on ways to reduce energy consumption townwide, with resulting reductions in energy costs and air pollution, along with encouragement of use of renewable energy resources.
<b>Fiscal Sustainability and Economic Development</b>	This element would help the Town evaluate its fiscal strengths and weaknesses, and consider policies to protect it against vulnerabilities and threats – short term actions that support a long term economic sustainability strategy. This element would examine the social, economic, and public debt impacts of land use policies.
<b>Community Health &amp; Safety</b>	The addition of a community health and safety element in the Community Plan would bring together the major topics that impact public health. This element could focus on the links between health and the built environment as one strategy to help maintain and improve public health overall.
<b>Green Infrastructure &amp; Green Building</b>	A focus on green infrastructure and building in the plan would broaden the traditional planning concepts by recognizing these elements as fundamental for meeting current and future ecological, economic, and social needs. Policies on this topic could help the Town move toward a healthy ecosystem and population.
<b>Waste Stream Reduction &amp; Re-Use</b>	Policies that encourage waste stream reduction and re-use can both reduce costs of waste management and support the natural environment. Policies around this element would focus on ways that the community could help reduce waste and promote recycling of materials.

## Option A. Limit to Land Use Plan Update

### Description

The simplest option would be to refresh Cary's existing Land Use Plan as a free-standing component of the Town's Comprehensive Plan. It has been suggested and expected that data would be refreshed, the existing array of Area Plans would be blended into the townwide Land Use Plan Map, and that the organization and format would remain relatively unchanged. In this option, no updates would be made to any additional components of the Town's current Comprehensive Plan.

### Discussion

This option would have the advantage of familiarity and focus. The Comprehensive Plan elements would remain the same, and in the traditional Town order. The Town could continue to update the elements individually as they become outdated and need to be addressed. Short term cost of preparation would be lowest for this option, and need for public engagement would be the most minimal.

The major disadvantage is that this option would retain Cary's current system of free-standing Comprehensive Plan elements that are not connected to each other. At the Council Retreat in January, Members expressed interest in seeing the Town take a more comprehensive planning approach, this option would not help Council meet this objective. Cost savings considerations also go both ways. While this would be the least expensive option in the short term (in terms of dollars and also staff time), continuing to update plans on an ad hoc basis - each with new committees, public hearings, etc - could make this one of the more expensive options in the long term.

### Draft Table of Contents – Option A: Land Use Plan Update

- Chapter 1 Introduction
- Chapter 2 Natural Resources
- Chapter 3 The Built Environment
- Chapter 4 Land Supply
- Chapter 5 Goals and Objectives
- Chapter 6 Plan Concepts and Land Use Definitions
- Chapter 7 Design Guidelines
- Chapter 8 The Land Use Map
- Chapter 9 Recommendations for Future Action

## Option B: Incorporate Vision, Growth Management, Chatham Cary Joint Land Use Plan, Affordable Housing, Historic Preservation Plan

### **Description**

A second option would be to do a reorganization of the Town's current Comprehensive Plan, but not develop new topics. This option introduces the term "Community Plan." This option would integrate two of the Town's oldest elements—the Vision Element (2004), and the Growth Management Plan (2000)—into the new Community Plan, and also fold in two more recent documents, the 2010 Affordable Housing Plan and the 2010 Historic Preservation Master Plan. This option would allow the Town to revisit the Visioning Element and set new direction for the community moving forward. This option would also take the Town's transportation policies into consideration. The Town is scheduled to begin work next year on a new Comprehensive Transportation Plan (CTP). The timing is such that the upcoming CTP initiative could be undertaken as a component of the new plan, or as a related initiative sharing a common Steering Committee, public outreach strategy, and review process. Finally, this option would take the new Chatham Cary Joint Land Use Plan and incorporate it into this new Community Plan along with other land use topics. The plan, as shown in the following draft Table of Contents, could be organized around the key themes of Built Environment and Mobility, Community Life, and Natural Environment.

### **Discussion**

This option would have the advantage of allowing the Town to go through a Visioning Process, along with the preparation of this new Plan. Visioning processes help develop community goals and objectives that articulate the aspirations of citizens about the future. Given that the Town's current Vision Element is eight years old, revisiting the Vision is a timely initiative. This option would also include a re-structuring of topics around major themes, allowing for more connectedness among issues. (A topic of interest at the Town Council's January Retreat.) While accommodating this restructuring, this option does not introduce new topics (that would happen in Option C). Outside resources that would likely be necessary include expertise in planning and growth management, in transportation analysis, and in fiscal analysis.

By updating the CTP at the same time, this option would also allow land use and transportation policies to be considered jointly, so that they are more integrated, and thus better coordinated. By merging the process of updating the Transportation Plan along with the Community Plan, the Town would realize cost savings and coordination benefits by combining the public engagement processes, and coordinating discussions and policies. The major disadvantage of this approach is higher short term cost than Option A to produce a new Community Plan, both in terms of dollars and in terms of time to complete. Advantages include establishing a comprehensive framework into which future planning initiatives would fit.

A draft Table of Contents for Option B appears on the following page.



## **Draft Table of Contents – Option B: Community Plan**

### Chapter 1 Overview

- A Introduction and Organization of the Plan
- B Relationship of the Plan to other Comprehensive Plan Components
- C Vision for the Future
- D Values and Guiding Principles

### Chapter 2 Component Elements

- A Built Environment and Mobility
  - a Regional Context
  - b Land Use
  - c Transportation Systems / Connectivity
- B Community Life
  - a Sustainable Neighborhoods
  - b Affordable Housing
  - c Parks and Recreation
  - d Arts and Culture
- C Natural Environment
  - a Water Resources
  - b Open Space

### Chapter 3 Specific Geographies (Areas of Potential Change)

- A Downtown
- B Aging Commercial Corridors / Retail Centers
- C Western Area

### Chapter 5 Implementation

- A Follow-up Actions
- B Subsequent Areas / Topics to be Studied

### Appendix Summaries of Related Components of Cary's Comprehensive Plan

## Option C: Add New Key Topics Not Currently Addressed

### **Description**

Option C would build on Option B, not only integrating the Vision, Growth Management, Affordable Housing, and Historic Preservation elements, along with coordinating with the CTP, but also integrating policies from the other existing Comprehensive Plan elements. The Historic Preservation Plan and the Affordable Housing Plan would be incorporated into the Community Plan with no/minimal changes to the content. The new Parks and Recreation Master Plan and the Public Art master Plan would be cited by reference. The Community Plan would summarize the goals, policies, and strategies, and highlight where those policies intersect with Community Plan priorities. The new plan would pull in information regarding water and wastewater treatment systems, but would not integrate those planning systems into this new document.

This option also addresses a number of new topics that previously have not been fully addressed in the Town's Comprehensive Plan. Potential topics, as described earlier in this report, include economic development/redevelopment, housing and sustainable neighborhoods, environmental resources, air and water quality, community facilities and infrastructure, fiscal sustainability, and energy conservation. These additional topics, highlighted in blue in the following Table of Contents, would help emphasize how all these issues relate to one another.

### **Discussion**

The idea behind Option C is to set a target for having a completely integrated, one-document Comprehensive Plan at some point in the future – to approach preparation of this Community Plan by constructing an integrated policy framework with a focus on land use issues and references to other free-standing policy documents, while creating placeholders within the framework for those related issues to be folded in over time as individual plans are updated. Outside resources that would likely be necessary include expertise in planning and growth management, in transportation analysis, and in fiscal analysis.

An example of how this approach can work is illustrated by considering the Town's new Parks, Recreation, and Cultural Resources Master Plan. That Plan, now at completion, needs to have its policies considered with this new Community Plan, but it would not be advisable to move away from a fully completed plan that is right now up for adoption after years of work. The Community Plan could be constructed with references to the Parks and Recreation Master Plan, with expectation that the next time that plan is updated, it will be updated as a component of the Community Plan. This third option has benefits of being able to connect the issues now, and move toward a fully integrated Comprehensive Plan in a planned process over time. As with Option B, the major disadvantage includes the higher short term costs to produce a new Community Plan, both in terms of dollars and in terms of time to complete. It would enhance the advantages of Option B in terms of addressing the connectedness of issues. It would also have the advantage of introducing additional, important, timely new topics.

## **Draft Table of Contents – Option C: Community Plan**

### Chapter 1 Overview

- A Introduction and Organization of the Plan
- B Relationship of the Plan to other Comprehensive Plan Components
- C Vision for the Future
- D Values and Guiding Principles

### Chapter 2 Component Elements

- A Built Environment and Mobility
  - a Regional Context
  - b Land Use
  - c Transportation Systems / Connectivity
  - d Historic Preservation
  - e Community Facilities and Infrastructure
  - f Redevelopment
- B Community Life
  - a Sustainable Neighborhoods
  - b Affordable Housing
  - c Parks and Recreation
  - d Arts and Culture
  - e Economic / Fiscal Sustainability
- C Natural Environment
  - a Water Resources
  - b Open Space
  - c Energy Use and Conservation

### Chapter 3 Specific Geographies (Areas of Potential Change)

- A Downtown
- B Aging Commercial Corridors / Retail Centers
- C Western Area

### Chapter 5 Implementation

- A Follow-up Actions
- B Subsequent Areas / Topics to be Studied

### Appendix Summaries of Related Components of Cary's Comprehensive Plan

## Option D Preparation of a Complete Comprehensive Plan

### **Description**

The final option—Option D—would be to build on what Option C proposes, and incorporate an even broader array of planning topics not yet addressed by the Town in the context of creating a full, complete, new Comprehensive Plan for Cary. Proposed additional topics include community health and safety, green infrastructure and green building, waste stream reduction and re-use, and environmental sustainability. These added topics are highlighted in green in the following Table of Contents. This list is not meant to be exhaustive, but merely illustrative of the types of topics that could be incorporated into the Plan. Town Council members (with the advice of a Steering Committee and other interested stakeholders) will determine the specific topics to be addressed, and topics could be added during the initial stages of Phase II work.

This option would expand the scope into preparation of a fully integrated, one-document Comprehensive Plan. This would be the place in Cary's policy framework where all official goals and objectives would fit, including Parks, Recreation, and Cultural Resources, Transportation, and Water/Wastewater Systems.

### **Discussion**

This is the most robust and ambitious of the four options. The main advantage is that it would completely tie together Cary's policies, goals, objectives, priorities, and implementation strategies into one cohesive Comprehensive Plan. This is standard practice in many communities, but would represent a shift for the Town of Cary because of the historical framework of policy documents here. That shift would be accompanied by several significant disadvantages. One is time - - this approach would take longer to produce and complete than the other options. Along with extended time comes an extended budget, to reframe several existing policy documents. And finally, along with that re-framing would come a disruption in the course of ongoing plan-making, since there are several plans that are currently in the final stages of the adoption process (most notably the Parks, Recreation, and Cultural Resources Master Plan, and the Chatham Cary Joint Land Use Plan). Setting those plans aside rather than concluding final action would have multiple disadvantages.

Outside resources that would likely be necessary include expertise in planning and growth management, in transportation analysis, in fiscal analysis, and in energy generation and conservation strategies.

## **Draft Table of Contents – Option D: New Comprehensive Plan**

### Chapter 1 Overview

- A Introduction and Organization of the Plan
- B Relationship of the Plan to other Comprehensive Plan Components
- C Vision for the Future
- D Values and Guiding Principles

### Chapter 2 Component Elements

- A Built Environment and Mobility
  - a Regional Context
  - b Land Use
  - c Transportation Systems / Connectivity
  - d Historic Preservation
  - e Community Facilities and Infrastructure
  - f Redevelopment
  - g Green Infrastructure and Green Building
- B Community Life
  - a Sustainable Neighborhoods
  - b Affordable Housing
  - c Parks and Recreation
  - d Arts and Culture
  - e Economic / Fiscal Sustainability
  - f Community Health and Safety
- C Natural Environment
  - a Water Resources
  - b Open Space
  - c Energy Use and Conservation
  - d Waste Stream Reduction and Re-Use

### Chapter 3 Specific Geographies (Areas of Potential Change)

- A Downtown
- B Aging Commercial Corridors / Retail Centers
- C Western Area

### Chapter 5 Implementation

- A Follow-up Actions
- B Subsequent Areas / Topics to be Studied

## B. Recommendations

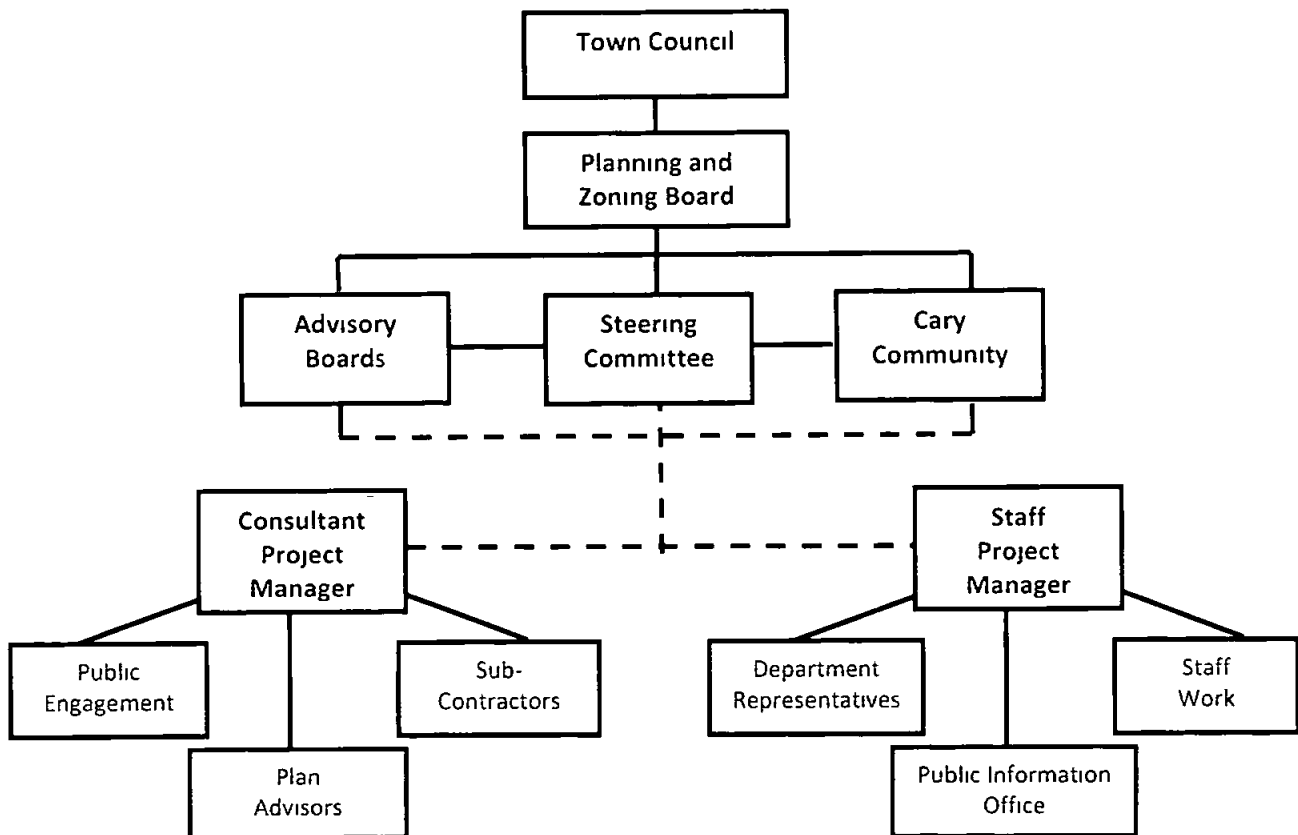
### Structure of Plan

Options B and C from the preceding pages offer the best balance between the need for integration and connectedness, vs the need for timely production and cost considerations

Option C does the best job of striking this balance while incorporating consideration of new ideas and topics. An important advantage of this framework is that it is organized to group together issues that are closely related. For example, land use, transportation, and infrastructure issues are highly related, having those as separate chapters in a Comprehensive Plan for a community like Cary would miss the opportunity to leverage the relatedness.

### Management Structure

Attention is needed to the structure put in place to manage production of this new plan, whichever option is selected. Key considerations include incorporating the roles of the Town Council, the Planning and Zoning Board, an appointed Steering Committee, related Town Advisory Boards, the community at large, a staff team, and a consultant team. The following structure is proposed as the organization and reporting framework for this initiative.



## 5. Options for the Public Engagement Process

Both the Town Council and the Town’s Planning Staff have emphasized the importance of using an approach to preparing this Community Plan update that is both inclusive as well as focused, and that credibly publicizes the planning process so that participation in the update process is a choice. A plan for the future will be more relevant and have greater potential to be implemented if it is informed by representative insight of residents and other stakeholders.

In order to accomplish this, the proposed Public Engagement Process has two major, distinct components: (1) Preparation, and (2) Engagement. In general, the proposed effort will focus on assets and successes to set a positive foundation that is inspirational, as well as empowering. The two proposed components are discussed below. Please note that while this approach is focused on a Community Plan, it is adaptable to accommodating other planning topics.

PROPOSED PUBLIC ENGAGEMENT PROCESS
<b>Component 1 – The Preparation Component</b>
– Part 1 – Establish Leadership
– Part 2 – Prepare and Execute Communication Plan
– Part 3 – Prepare and Execute Outreach Plan
<b>Component 2 – The Engagement Component</b>
– Part 1 – Gather Ideas – <i>The Generative Process</i>
– Part 2 – Analyze Input – <i>The Analytical Process</i>
– Part 3 – Ratify Plan – <i>The Deliberative Process</i>

### A. Component I – The Preparation Component

The Preparation Component will create the initial foundation for effective engagement activities and meaningful participation. It includes three proposed parts: (a) *Establish Leadership*, (b) *Prepare and Execute a Communication Plan*, and (c) *Prepare and Execute an Outreach Plan*.

#### Part 1: Establish Leadership

An inclusive, focused planning process needs leadership with a clear definition of roles. Proposed recommendations for the leadership structure are provided below:

1. Steering Committee: A broad group of 18 to 30 members of the Town should be formed with the expressed purpose of providing guidance (in the form of recommendations) to a Project Management Team (made up of Town Staff and the Consultant) on both the process and substance of the planning effort. The Steering Committee will be activated at project initiation and be finished upon delivering their recommendation to the Town Council and the Planning and Zoning Board. With an effective facilitation process, these individuals will become champions of both the process and the outcomes. It is anticipated that the Steering Committee will meet on a monthly basis for the duration of the project. The staff will lead the nomination process, creating a nominating committee to identify a diverse, capable group of community members for the Steering Committee. Town Staff will support the committee, but not be a member of the committee. (The term

“Steering Committee” should be seen as a functional name. This group could be called the “Planning Committee,” “Committee for the Future,” “Framework Task Force,” or some other acceptable name that appropriately conveys the role. The role of the Steering Committee will be to provide guidance, and to make recommendations to the Planning and Zoning Board and Town Council.

- 2 Process Committees Two process committees are recommended. One committee will be focused on communication/publicity and the other will be focused on the outreach strategy. The committees will work intensely for the first three months of the project (meeting at most twice per month) and then intermittently as the project proceeds (timed toward engagement events). It is expected that some Steering Committee members will serve on the process committees, but there is likely to be more non-Steering Committees.
- 3 Staff Town Staff - not just from the Planning Department but from all Town Departments - will play an important role in supporting the public involvement process. Staff members will provide guidance for the consultant’s process recommendations. They will also review all proposed meeting agendas and supporting material for the committees and public meetings. It is also expected that the staff will assist with the logistics of securing meeting facilities and coordinating the marketing materials with appropriate Town channels, e.g. Cary TV 11, BUD newsletter, etc.
- 4 Consulting Team The consulting team will be the key facilitators of the public involvement process, designing and facilitating the committee meetings and the main public engagement activities. The consultants will also be responsible for designing and managing the project website, brand standards, and key collateral materials, e.g. flyers, post cards, etc.
- 5 Town Council and Planning and Zoning Board The elected officials for the Town, as well as the appointed members of the Planning and Zoning Board will be represented on the Steering Committee. At key project milestones, the staff and consulting team will engage both bodies - in joint sessions - to share progress, gain their insight, and seek support for building momentum. Depending on the final scope for topics (elements/themes) of the planning effort, other Town boards and commissions may need to be formally engaged. It is the statutory authority and responsibility of the Planning and Zoning Board to make recommendations regarding a Comprehensive Plan to the Town Council, which is the approving entity for adoption or amendment of a Comprehensive Plan.

## **Part 2: Prepare and Execute Communication Plan**

Part 2 is organized in two segments. The first segment includes the Town’s typical outline for a Communications Plan. The second segment - beginning with number 8, *Tactics* - addresses the specifically proposed tasks to carry-out the plan. It is important to note that the Communications Plan is supported by the outreach strategy as outlined in *Part 3—Prepare and Execute Outreach Plan*.



- 1 Purpose/Situation Analysis It has been 16 years since the Town has comprehensively-addressed land use policies for development, redevelopment, and conservation. In the meantime, significant trends are emerging that will have an impact on Cary. These trends need to be understood to ensure a long-term sustainable future for the Town. Good planning practice - reinforced by Town Council direction - suggests the need for an inclusive communication and engagement program for the new land plan and related policy needs.
- 2 Goal The simple goal for the communication plan is to ensure that participation in this planning process is a choice. This means developing a comprehensive strategy to create awareness that opportunities exist in order to allow all interested stakeholders to contribute to developing a plan.
- 3 Objectives Key outcomes of the communication plan include the desire - throughout the planning process - to
  - a Attract participation that statistically represents the Town's demographics,
  - b Attract participation that represents the Town's broad geography,
  - c Inform public opinions and input with solid technical research (connect the issues, be clear about consequences, etc ), and
  - d Increase pride (emotional attachment) that participants have for their Town
- 4 Targets The communications plan is focused on anyone that lives or works in the Town. As stated above, this is really anyone that cares about the future of the community. Specific methods will be used to attract diverse individuals, including looking a range of attributes: psychographic, demographic, power (ability to stop, delay or change the project), reputation (opinion leaders), position, membership, and role in the decision-making process.
- 5 Key Messages It is understood that it is challenging in most communities to rally the community to engage in a planning effort. This is especially true in a place like Cary where the community enjoys high quality services and many people enjoy upper-middle and upper-class household incomes. The key messages of the communications plan include the following points:
  - a The Town of Cary has established itself as one of the premiere communities in the United States
  - b This is a result of solid stewardship (planning) and fortuitous circumstances of the proximity to the Research Triangle Park and leading research and educational institutions. The attractive natural landscape and temperate climate have also contributed to Cary's appeal.

- c Nothing stays the same, change is coming to Cary Important demographic trends—for the Town and the country—will have an impact on Cary’s future
  - d The basic development pattern for the Town is set, so change in some areas will not re-define the community (This could be for better or worse, depending on individual perspective )
  - e The Town has grown to the point in which there are limited lands for future expansion In addition, there have never been more underutilized commercial areas, suggesting redevelopment strategies are more important than in the past
  - f A new community plan—and the associated process—provide a critical opportunity to assess the community of today, understand choices for the future, and create preferred policies that match the vision
- 6 General Facts This portion of the communication plan will be completed once the schedule for Phase II is established (This is the, “who, what, where, when, why, how, how much, etc ” for the engagement process )
- 7 Strategies A comprehensive communication plan will be implemented that is driven by authentic and creative messaging, paid and earned media, leveraging of existing Town communication assets, cooperation with non-government organizations, and leadership from a publicity/communication committee
- 8 Tactics The eight specific tools recommended to implement the strategies and key messages are described in the table below
- 9 Spokesperson At key points in the process, talking points will be developed for project leaders by the Project Management Team and reviewed by the Town’s Public Information staff Anticipated spokespersons include the Town Planning Director and the Town Public Information Director These two contacts will decide if it is appropriate for others, (e g The Steering Committee, the consulting team, etc ) to speak with the media on specific issues

Key Message Tactics	
1 Prepare the Overview	This will clarify the outreach structure, including audience definition, articulation of product, and guidelines for processing input. This will draw upon the input from external stakeholders during Component 1, including the "Most Important Issues" identified.
2 Prepare Project Identity	This will provide the graphic imagery for project communications. (See section on "Project Branding") Ideas for branding are offered in this report. Responsibility for deciding on a project brand will rest with the Steering Committee, upon consultation with staff and the Public Information Office.
3 Design and Launch Project Web Site	A robust and interactive project web site will be created to provide thorough information on the project and community involvement opportunities. Cary citizens would expect such a tool. The project web site will be linked off the Town's home page, www.townofcary.org. The Town also has tools to complement the project web site, including web polls, electronic newsletters, and a growing list of on-line governmental services.
4 Create Social Media Platforms	A project Facebook page will be established, as well as a Twitter account. (The Town has 1,500 Twitter followers.)
5 Prepare Base Print Material	The following collateral materials will be designed. Quantities will be determined with input from the Outreach Committee. (A printing allowance will be prepared for budget purposes.) <ul style="list-style-type: none"> <li>• Post cards, flyers and posters</li> <li>• Door hangers and yard flags</li> <li>• Promotional items (magnets and pens)</li> <li>• Banners and signage (for major events)</li> </ul>
6 Prepare Media Plan	A media plan will be developed to address paid and earned opportunities. An allowance for paid media will be included in the budget.
7 Create and Produce a Project Newsletter	An electronic newsletter will be created and distributed to the Town's 5,000 newsletter subscribers and additional participants that provide email addresses throughout the process.
8 Create and Produce Infomercials	A series (three to five) of videos will be prepared over the course of the project as a means to convey important information on what is being learned and experienced in the community, as well as opportunities to get involved.

### **Part 3: Prepare and Execute Outreach Plan**

The specific tasks and timeframes for community outreach will vary depending upon which of the structural options for the plan is selected (A, B, C, or D as described above). Following is a table that indicates which components of the outreach strategy would be appropriate to accompany each option.

Proposed Community Plan for the Town of Cary

Engagement Task by Component and Part		Update Options			
		A	B	C	D*
<b>Component I The Preparation Component</b>					
<b>Part 1</b>	<b>Establish Leadership</b>				
1	Steering Committees	●	●	●	●
2	Process Committees		●	●	●
<b>Part 2</b>	<b>Prepare and Execute Communication Plan</b>				
1	Key Message Tactics			●	●
2	Prepare the Overview	○	●	●	●
3	Prepare Project Identity	●	●	●	●
4	Design and Launch Project Web Site		●	●	●
5	Create Social Media Platforms		●	●	●
6	Prepare Base Print Material	○	○	●	●
7	Prepare Media Plan		○	●	●
8	Create and Produce a Project Newsletter		●	●	●
9	Create and Produce Infomercials			●	●
10	Consolidate Communications Plans across Depts				●
<b>Part 3</b>	<b>Prepare and Execute Outreach Plan</b>				
1	Affirm and Execute the Outreach Plan	○	○	●	●
2	Create Speakers Bureau			●	●
3	Attend Community Events		○	●	●
4	CEO Roundtable			●	●
<b>Component II The Engagement Component</b>					
<b>Part 1</b>	<b>Gather Ideas - The Generative Process</b>				
1	Conduct the Summit on the Future			●	●
2	Conduct Area Conversations		●	●	●
3	Deploy Meeting in a Box		○	●	●
4	Facilitate Web Input		○	●	●
5	Conduct Town Council Work Session(s)	●	●	●	●
<b>Part 2</b>	<b>Analyze Input - The Analytical Process</b>				
1	Conduct Conceptual Framework Meetings	●	●	●	●
2	Conduct Stakeholder Interviews			●	●
3	Facilitate Web Input		○	●	●
4	Conduct Town Council Work Session(s)	●	●	●	●
<b>Part 3</b>	<b>Ratify Plan Recommendations - The Deliberative Process</b>				
1	Open House 1	●	●	●	●
2	Open House 2		●	●	●
3	Facilitate Web Input		○	●	●
<b>Key</b>					
●	Effort consistent with work program				
○	Effort reduced from work program				
*	The process for Option D will contain the same component parts as Option C, but with an expectation that the process and the component parts will extend over a longer period of time				

To meet objectives of an inclusive process, the Communication Plan must be buttressed with a more personal approach to bringing people together. An Outreach Committee will be formed to refine and carryout the outreach plan

1 Affirm and Execute the Outreach Plan

a **Geographic** Specific geographic area of the community will be identified for focused outreach. The four council districts could be the starting point. For each district, area captains (two to three) will be identified. The area captains - with support from staff and consultants - will identify and enlist other leaders and organizations within their areas. The area captains will be part of - and report to - the outreach process committee and can particularly help to engaging hard to reach members of the community.

b **Civic** A comprehensive outreach will be made to the Town's vast network of civic organizations. Town-sponsored sporting and recreation events could be a good target for flyer distribution. Displays at key gather locations will also be displayed, e.g. shopping malls. Opportunities to speak and/or leverage advertisement (e.g., newsletters) will be sought.

c **Demographic** The outreach plan will be calibrated to the demographics of the Town. A concerted effort to engage and identify under-represented groups.

d Create Speakers Bureau A cadre (a dozen or so) of community members will be trained and equipped to speak about the planning process.

e Attend Community Events The Planning effort should have a presence (e.g. booth) at major community events. Specific events should be targeted to support major project milestones. Schools, churches, libraries, festivals, and recreational facilities all provide a forum. They represent additional networks the Outreach Committee might utilize. Appendix D contains a summary of an award-winning approach to such outreach that was found and recommended for consideration by a member of Cary's Environmental Advisory Board.

f CEO Roundtable Early in the process (a month in advance of the first public engagement activity) the Mayor should convene a meeting (breakfast) with the Town's major CEO's. This would be an opportunity to share and preview ideas that will be discussed in the broad-based community meetings.

Current groups
Current groups within Cary include, but are not limited to
<ul style="list-style-type: none"> <li>• Boards, commissions and committees</li> <li>• Police and Fire networks (CAP Team – Citizens Assisting Police, Citizens Police Academy)</li> <li>• Block Leaders</li> <li>• Businesses (large and small)</li> <li>• Cary Chamber Members</li> <li>• Places of Worship</li> <li>• Civic Organizations</li> <li>• Elected Officials</li> <li>• Employees</li> <li>• Homeowners Associations</li> <li>• Media</li> <li>• Professional Associations</li> <li>• Schools (public and private)</li> </ul>

## **B. Component II – The Engagement Component**

With preparation tasks underway, the actual engagement of residents and other stakeholders can commence. Three parts of the Engagement Component are recommended. They are iterative in nature, following a logic sequence that includes 1) gathering of ideas from public and stakeholders, 2) analyzing and integrating of those ideas with the findings of the technical process, and 3) affirming and prioritizing of the results. The three individual parts are described below. Specific techniques that could be used in each part are also listed. They are

### **Part 1: Gather Ideas -- The Generative Process**

The proposed first steps in the Public Engagement Process are designed to (1) Make a positive impression about the process, and (2) Create a large foundation of ideas generated by the public. Ideas gathered through generative techniques create the foundation for the shared community values, development principles, and goals of the final Community Plan.

- 1 Conduct the Summit on the Future. This would be the “big” kick-off to get the community engaged and aware that the process is underway. The target attendance would be 600 for this two-and-one-half hour session. The program would include a compelling framing of the state of Cary (relative to development), input gathered from participants, thought-provoking national speaker (see below), and a charge (and tools) to encourage broader engagement.
  - a The Project Management Team will design the specifics of this meeting in consultation with staff and Steering Committee.
  - b The Summit would include a leading thinker on demographic and market trends that could provoke thoughtful input about the future of Cary. Potential speakers: Alan Ehrenhalt, The Great Inversion and the Future of the American City, Richard Florida, The Great Reset: How the Post-Crash Economy will Change the Way We Live and Work, and Carol Coletta, of Coletta & Company, but most recently of CEO for Cities.
- 2 Conduct Area Conversations. Four smaller scale meetings are planned around the community two weeks after the Summit. These meetings are small relative to the Summit, but still targeting 100 to 200 participants. In terms of the substance, these meetings would build on the Summit and will place a larger emphasis on the character of development. These meetings will be facilitated by the consulting team and include a visual preference survey and a technique the team calls *Strong Places Weak Places*, which is designed to identify strengths, weaknesses, and opportunities related to the physical conditions of the community. Key pad polling could be an option for this meeting, but are not required.

- | <b>Distribution Channels</b>   |  |
|--|--|
| The Town has the following assets that will be utilized in pushing the messages about the planning process, including opportunities to get involved  |  |
| <ul style="list-style-type: none"> <li>• BUD Newsletter and other town newsletters,</li> <li>• Cary TV 11, including electronic bulletin board, the BUD TV show, Cary Matters,</li> <li>• Twitter</li> <li>• E-mail (residents, staff, boards, commission, council),</li> <li>• Utility Bills including (envelope messages),</li> <li>• Town Website, and</li> <li>• Town Facebook Page</li> </ul> |  |
- a The consulting team will design the specifics of this meeting in consultation with staff and Steering Committee
  - b The overall outreach strategy will be refined based on analysis of participants at the Summit (This will allow for targeting the messages )
- 3 Deploy Meeting in a Box These meetings are designed to be self-facilitated and to fill-in the outreach “holes” by taking the meeting to the people, especially hard to reach members of the community Analysis of participants at the Summit and Area Conversations will be conducted and targets for deploying the “Meeting in a Box ” This might mean going to employers, homeowners’ association meetings or leveraging events like the Chamber’s “Eye Openers ”
- a The overall outreach strategy will be refined based on analysis of participants at the Summit (This will allow for targeted the messages )
- 4 Facilitate Web Input The project web site will augment the face-to-face opportunities Presentations can be provided (PDFs and/or videos) as well as polling Map-based input can also be gained
- 5 Conduct Joint Town Council/Planning and Zoning Board Work Session(s) The staff and team will conduct a work session a joint Town Council/Planning and Zoning Board to provide 1 ) a comprehensive summary of “what we learned” from the Participation Component, 2 ) a concise presentation of the technical research, and 3 ) expectations for Part 2 of the community involvement

## **Part 2: Analyze Input -- The Analytical Process**

The second part of the Engagement Component is focused on integrating input from the established leadership with community participation and technical activities to create a conceptual development framework This will serve as the basis for the Community Plan

- 1 Conduct Conceptual Framework Meetings Four meetings will be conducted in different locations in the community These meetings will have identical formats with part of the meeting dedicated to Town-wide issues and part addressing the particular quadrant

Where Part 1 of the engagement process gave more emphasis to intuitive input, this Part gives more emphasis to the technical research inputs Most importantly, the involvement activities integrate the two inputs in a way that frames choices on “where” and “how” the community should grow in the future

- 3 Facilitate Web Input The project web site will augment the face-to-face opportunities. In this part, presentations, display material, and comment forms can be presented on the project web site.

## **C. Branding the Initiative**

The planning effort is more than just a technical exercise. The most successful plans are those that are rooted in the values, informed by intuitive community insight, and broadly owned by the community. Creating an environment that yields such outcomes requires a deliberate marketing campaign. The initial task is establishing the brand for the campaign, in this case, the brand for the public process.

An effective brand will convey a clear message, foster credibility, and appeal to the emotions of the target audience. A strong brand identity will convey a “sticky message” that grows stronger with reinforcing experiences, as planned in the recommendations in the previous section.

### **Concepts**

This section provides background on the proposed branding concepts for the planning process. A few key points about preparing the concepts:

- 1 Process versus Product It is important to make a distinction between branding the process and branding the policy document. Currently, the working title of the policy document is, “The Community Plan for the Town of Cary.” The process title might take on an active voice, as in “Creating ” or “Get Involved.” The two (process and product) can be connected, as in “What Do YOU Think? Creating a Community Plan.”
- 2 Sources of Input The proposed concepts are based on the inputs gained from interactions between the consulting team and the Town Council and town staff, where insight was offered on the present conditions and future issues. Specifically, those two experiences were:
  - a In January 2012, the consulting team met with Town Council and staff leadership at the Council’s annual retreat.
  - b In March 2012, the staff and consulting team conducting meetings with a wide-range of community residents and other stakeholders.
- 3 Themes The following themes emerged from the above activities. While there is some consistency, there are also conflicts. The two strongest sentiments reflect this conflict “change is coming” versus “we like this place just the way it is.” There are variations on these themes, but these two statements are indicative. Other sentiments include:
  - a Connect to self-interest (potential change in property values),
  - b Create a sense of urgency,



- c Alternative development patterns are necessary (higher density, vertical mixed use),
  - d The community is fine just as it is (suburban pattern, lifestyle),
  - e Change is inevitable,
  - f Some people just don't care (apathy), and
  - g Make this an educational process, demonstrate why this is important
- 4 **Recommendations** Below are some recommendations for names to be used to describe and define this process Some of them can be mixed and matched
- a Make a Remarkable Place The Community Framework for the Town of Cary
  - b Re-setting Cary? Choices for the Future
  - c Change is Coming Creating a Community Framework
  - d What Do YOU Think? Creating a Community Framework
  - e It Matters! The Community Framework for the Town of Cary
- 5 **Deployment** The selection of the specific brand and graphic identity can be made at the conclusion of Phase 1 An alternative would be to have The Steering Committee adopt/endorse (as opposed to being provided) the brand identity This can be an early and easy team-building task

## 6. Resources Needed for the Initiative

### A. Proposed Sequence and Schedule of Tasks

A proposed sequence and schedule of tasks has been prepared for Option C, the option described in this report on pages 16-17, creating a Cary Community Plan structured to emphasize the connectedness of issues Pursuing this option will require a significant commitment of time and resources, but should also result in broad community engagement in the preparation of the plan, and a policy framework that should serve the Town well Pursuit of Option C, as described in this report, would likely take the form of an 18-month effort involving all Town departments, multiple stakeholder groups, and oversight by an appointed Steering Committee A proposed sequence of steps and a projected timeline appears on the following page

Cary, NC  
 Land Use Plan Update – Cary Community Plan  
**DRAFT PROJECT SCHEDULE**

TASKS	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13	Month 14	Month 15	Month 16	Month 17	Month 18	
Task 1 Project Initiation	█																		
Task 2 Evaluation of Existing Plans		█	█																
Task 3 Data Update		█	█																
Task 4 Affirm Values Principles, Goals, Objectives				█	█														
Task 5 Prepare Draft Land Use Plan(s)							█	█	█	█	█	█							
Task 6 Prepare Related Components of Plan							█	█	█	█	█	█							
Task 7 Prepare Draft Document – Seek Feedback												█	█	█	█	█	█	█	█
Task 8 Public Review of Community Plan																			
Steering Committee Meetings	◆		◆		◆		◆		◆		◆		◆		◆		◆		◆
Community Engagement/Input*		I-1		I-2				II-2				II-3							

\* Numbers refer to Components and Parts in Draft Process Document (E.g., II-2 refers to Component II, Part 2)

Pursuit of Option A would involve the smallest commitment of time and resources, and could likely be accomplished within a year of commencement. Option B would involve similar tasks and a similar timeline to that shown on the previous page, with a structure and approach that is similar to Option C. Option D would likely consume two years of work by staff, a consultant team, and the community, to construct a fully integrated Comprehensive Plan.

## **B. Staff Commitment**

There are three major categories of staff expertise that will be needed for this new initiative:

- Resources from the Planning Department This project will be managed out of the Cary Planning Department and will need a project manager, likely devoting 30-50% of time during the course of this initiative. Other Planning Department resources that will be needed include the Planning Director's time and contributions from 3-4 other staff planners, with time allocations varying over the course of the initiative. Responsibilities of Planning Staff will include managing consultant work, managing logistics for all public meetings (arranging for venues, notifications, equipment, etc.), staffing the Steering Committee, review of all documents and products prior to public release, coordination with other Town departments, contributions to research and strategy sessions as issues unfold, preparation of agenda materials when meetings are scheduled with Advisory Boards and the Town Council, and distribution of products.
- Resources from all other Town Departments Options B, C, and D all would need substantial time contributions from other Town Departments. The clear direction is that this initiative coordinate with the work of other Departments, both to enhance the quality of ideas coming out of this planning process and also to keep other departments informed of and involved in policy discussions. Information from other Departments will be critical to assuring completeness of this new Community Plan, and the priorities and policy guidance that come out of this Community Plan should help inform and guide the work of other departments. At a minimum, a representative from each Town department will need to be assigned as a liaison to this initiative. In addition, specific tasks will need to pull in resources and take advantage of information from specific departments on an as-needed basis. Examples include gathering technical information from the Town's Public Works and Utilities Department, and coordination with the outreach mechanisms in place with the Police Department's Citizen's Police Academy.
- Coordination with Public Information Mechanisms Cary's Public Information program has extensive and proven mechanisms in place to get information out to the Cary community. This new planning initiative needs to build on the many existing relationships and contacts to distribute information, including taking advantage of the Public Information Office's ongoing work with local media, communications planning, Bud newsletter, cable television, and coordination with the Town's Speaker's Bureau.

## **C. Consultant Resources**

There are four categories of outside resources that would be needed for these approaches

- Comprehensive Planning Expertise Best-practices knowledge about Comprehensive and Land Use Planning techniques, including expertise in visioning, growth management strategies, redevelopment strategies, environmental considerations, scenario building and testing, and effective citizen engagement techniques
- Transportation Planning Expertise Knowledge and expertise about multi-modal transportation plans and capital investment programs in and around Cary, along with a toolbox of mobility strategies to offer for consideration
- Fiscal Analysis Expertise Knowledge and expertise regarding real estate markets, fiscal impacts of development on local government operations, and ability to analyze and project possible fiscal and economic outcomes resulting from alternative future development scenarios
- Speakers Bureau A collection of professionals with knowledge of how communities with characteristics and issues similar to Cary's have successfully positioned themselves for success in the future, to bring to Cary for presentations at community forums

## **D. Time and Resources Summary**

In summary, this proposed approach to preparing a new Cary Community Plan will need to consider time and resource needs as follows in order to be fully effective

- An 18 month period from commencement of the initiative to final adoption of a plan (time frame can be somewhat shorter or somewhat longer depending on which option for preparing the plan is determined to be most appropriate for Cary),
- A commitment from every Town Department to contribute staff resources to the initiative, with the Planning Department staff being the most involved in the process,
- Coordination with the Town's Public Information Program to assure continuity with other ongoing initiatives and full compliance with Cary's standards for public information, and
- Assistance from a consultant team to bring technical analysis, innovation and best-practices knowledge to the initiative, to help design and manage the citizen engagement process, to facilitate public dialogue, to synthesize the ideas into a coherent set of goals, objectives, strategies, and priorities for community consideration, and to produce draft and final products

Purposeful consideration of the "plan for the plan" as suggested in this Phase I report should help set the stage to have the necessary resources in place for a successful Phase II, and to establish realistic timeframe and commitment expectations for all needing to be involved