

Taking the Long-view of Local Historic Preservation

Crafting an Effective Historic Preservation Plan

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What Is Historic Preservation Planning?

APA defines Planning as: “The process of working to improve the welfare of people and their communities by creating more convenient, equitable, healthful, efficient, and attractive places for present and future generations.”

What Is Historic Preservation Planning?

Historic Preservation Planning, then, is: “The rational and methodical application of Historic Preservation to help bring about these improvements and to provide a clear and effective path to achieving those goals and reaching that overall vision.”

“Okay. Now, what the heck does *that* mean?”

Boise, Idaho

Idaho Falls, Idaho

✈️ Boise, ID—Idaho Falls, ID

Connecting (1 or more stops) 2 h 50 min+

Round trip price, Apr 22 – 26 from \$464

Delta, Alaska, United...

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Boise, IDO

Idaho Falls Regional Airport

Idaho Falls, ID

2 h 50 min
from \$464

Payette National Forest

Salmon-Challis National Forest


Boise National Forest

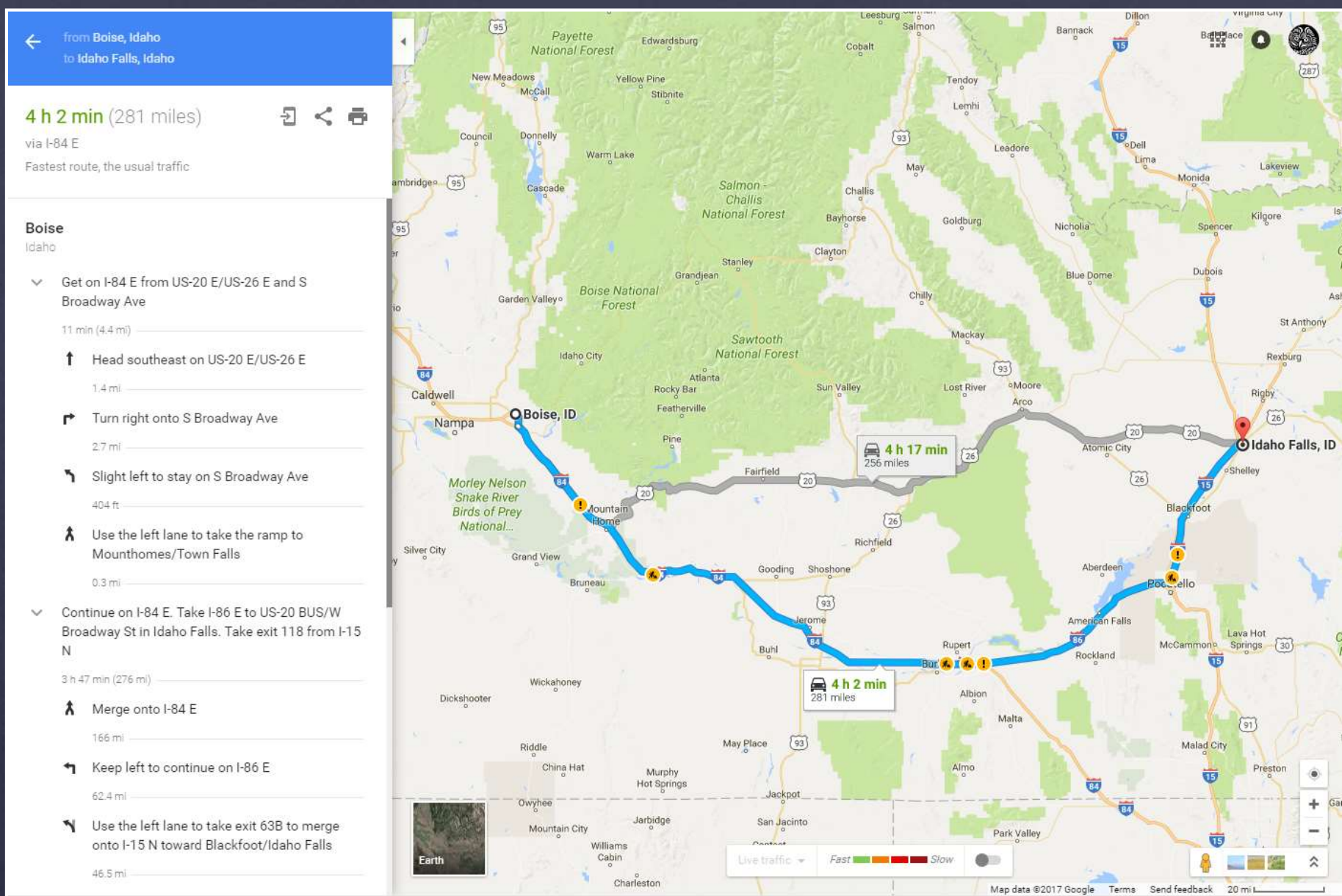
Sawtooth National Forest

Craters of the Moon National Monument & Preserve

Morley Nelson Snake River Birds of Prey National...

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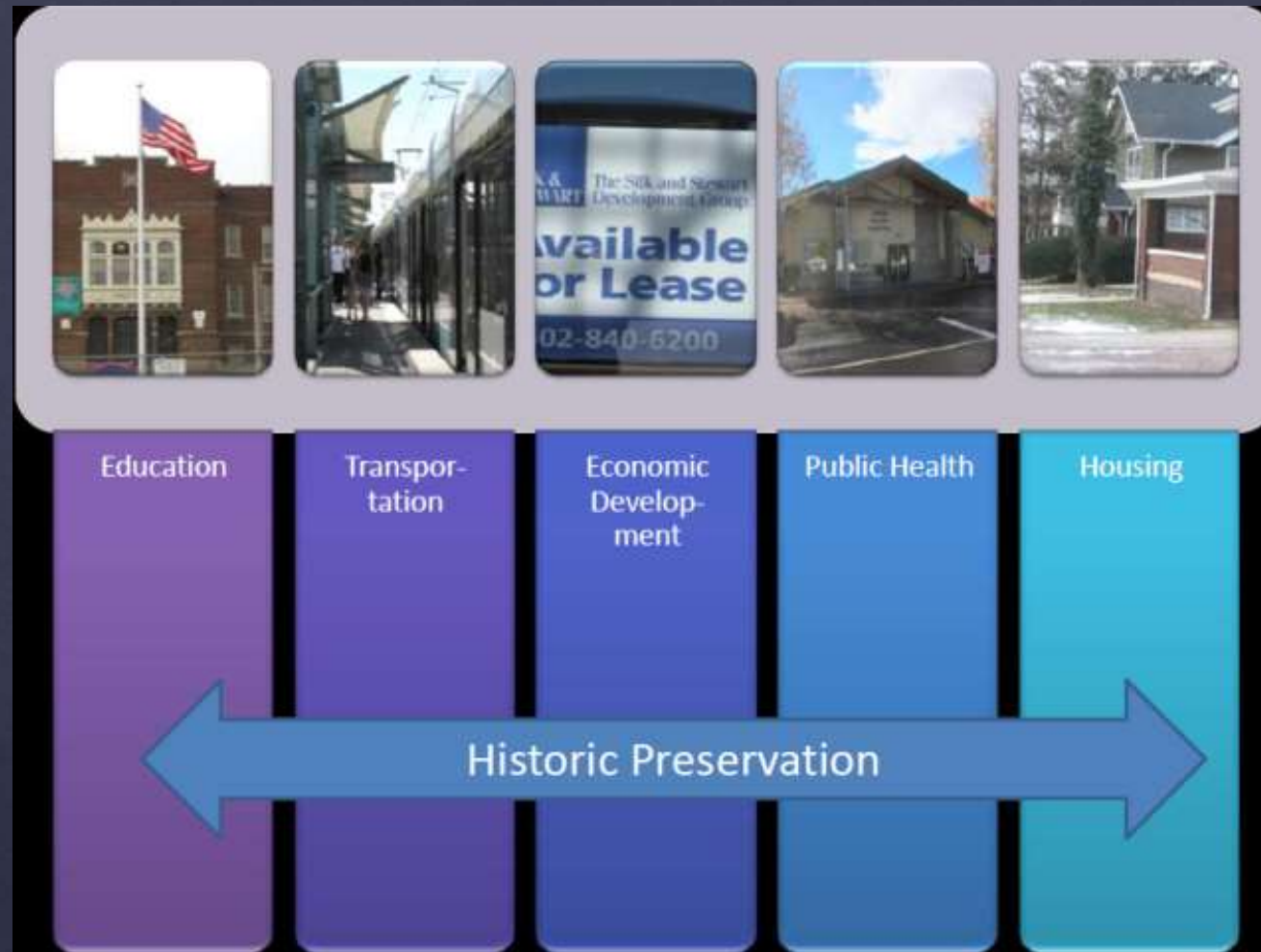
A Couple Things to Keep in Mind

- ◆ The City/County will already have a Comprehensive Plan; might be getting ready to update
- ◆ HP Plan should build off the existing (or anticipated) plan
- ◆ Be thinking about how your work and your HP Plan fits into the larger City/County Comp Plan

Traditional Comp/HP Relationship



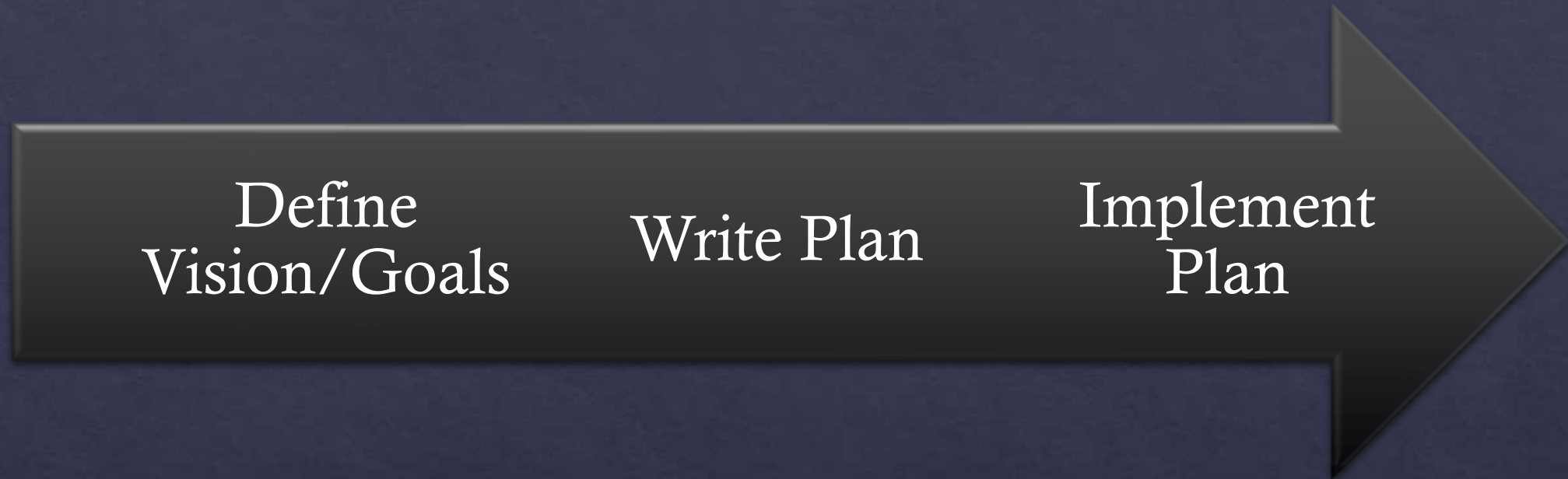
Traditional Comp/HP Relationship



“Sounds great!

So . . . how do we
do that?”

The Assumption



The Real Planning Cycle



Planning for Planning

- ◆ Develop timelines
- ◆ Identify people (who do we need and already have)
- ◆ What/how much time are we willing commit?
- ◆ What is likely to cost us?
 - ◆ Advertising costs
 - ◆ Any costs for public events
 - ◆ Editing and printing costs
- ◆ Be honest with how much time and energy the whole process will take

The Real Planning Cycle



Assess Current Situation

- ◆ Who are we and what do we do?
- ◆ What is our mission?
- ◆ And what are we *actually* spending our time on?
- ◆ What are our resources?
- ◆ Where are we right now?

SWOT Analysis

Strengths

◆ Helps organize your thoughts and assessment

Weaknesses

◆ Both Internal and External factors

Opportunities

Threats

SWOT Analysis: Important Considerations

- ◆ Focus on the “What,” not the “How” and “Why” (those will come later!)
- ◆ Keep answers short and to the point
- ◆ Don’t waffle or hedge on things – “Well, this happened, but . . .”
- ◆ **Be Honest!** Don’t “sugar-coat” things!

SWOT Analysis: Strengths

Primarily Internally focused

- ◆ What are we doing well?
- ◆ What recent achievements can we capitalize on?
- ◆ What is our capacity?
- ◆ What tools do we already have on hand?
- ◆ What things are we doing right?

SWOT Analysis: Strengths

Primarily Internally focused

- ◇ What are we doing well?
- ◇ What recent achievements can we capitalize on?
- ◇ What is our capacity?
 - ◇ What are our individual assets and abilities?
 - ◇ How much can we realistically take on?
- ◇ What tools do we already have on hand?
- ◇ What things are we doing right?

SWOT Analysis: Strengths

Primarily Internally focused

- ◆ What are we doing well?
- ◆ What recent achievements can we capitalize on?
- ◆ What is our capacity?
- ◆ What tools do we already have on hand?
 - ◆ Staff support? GIS capabilities?
 - ◆ HPC web presence?
- ◆ What things are we doing right?

SWOT Analysis: Strengths

Primarily Internally focused

- ◆ What are we doing well?
- ◆ What recent achievements can we capitalize on?
- ◆ What is our capacity?
- ◆ What tools do we already have on hand?
- ◆ What things are we doing right?

SWOT Analysis: Weaknesses

Primarily Internally focused

- ◆ Do we have a clear direction?
- ◆ What are the repeating issues are we having?
- ◆ What do we need to improve on?
- ◆ Are we doing things that are outside/counter to our mission?

SWOT Analysis: Weaknesses

Primarily Internally focused

- ◆ Do we have a clear direction?
- ◆ What are the repeating issues are we having?
 - ◆ “Huh, I didn’t even know we *had* a HPC.”
 - ◆ Are we only finding out about issues after the fact?
- ◆ What do we need to improve on?
- ◆ Are we doing things that are outside/counter to our mission?

SWOT Analysis: Weaknesses

Primarily Internally focused

- ◆ Do we have a clear direction?
- ◆ What are the repeating issues are we having?
- ◆ What do we need to improve on?
- ◆ Are we doing things that are outside/counter to our mission?
 - ◆ Are we getting distracted by non-HP things?

SWOT Analysis: Opportunities

Primarily Externally focused

- ◆ Up-coming/reoccurring things can we tap into?
- ◆ What ways we using to promote ourselves?
- ◆ Who are our potential partners?
- ◆ Who are our allies? County Commissioners? Chamber(s) of Commerce? Elsewhere?
- ◆ What tools are there out there we should get or develop?

SWOT Analysis: Threats

Primarily Externally focused

- ◆ What is making it harder for us to do our work?
- ◆ Who are/might be our detractors?
- ◆ What are the pressures to HP in our community?
- ◆ Are there ways HP negatively impacts our community? Or seen as negative?
- ◆ Have we had any “bad press” in the last 5 years?

SWOT Analysis: Threats

Primarily Externally focused

- ◆ What is making it harder for us to do our work?
- ◆ Who are/might be our detractors?
 - ◆ Specific individuals and “figurative” ones
- ◆ What are the pressures to HP in our community?
- ◆ Are there ways HP negatively impacts our community? Or seen as negative?
- ◆ Have we had any “bad press” in the last 5 years?

SWOT Analysis: Threats

Primarily Externally focused

- ◆ What is making it harder for us to do our work?
- ◆ Who are/might be our detractors?
- ◆ What are the pressures to HP in our community?
 - ◆ Developer pressures? Or lack of development?
 - ◆ Problematic property owners?
- ◆ Are there ways HP negatively impacts our community? Or seen as negative?
- ◆ Have we had any “bad press” in the last 5 years?

SWOT Analysis: Threats

Primarily Externally focused

- ◇ What is making it harder for us to do our work?
- ◇ Who are/might be our detractors?
- ◇ What are the pressures to HP in our community?
- ◇ Are there ways HP negatively impacts our community? Or seen as negative?
 - ◇ “Government road block to development!”
 - ◇ “I have to pay more to rehab my building!”
- ◇ Have we had any “bad press” in the last 5 years?

SWOT Analysis: Threats

Primarily Externally focused

- ◊ What is making it harder for us to do our work?
- ◊ Who are/might be our detractors?
- ◊ What are the pressures to HP in our community?
- ◊ HP negatively impact in our community? Or seen as negative?
- ◊ Have we had any “bad press” in the last 5 years?
 - ◊ Lost a local landmark?
 - ◊ Attempt to disband the HPC?

Public Engagement

- ◆ Vital part of the planning process
 - ◆ More voices, more ideas, things you never thought of
 - ◆ Builds excitement for the program
 - ◆ Community buy-in = easier implementation
- ◆ Be creative in where you get input
- ◆ Be creative in how you get input

Public Engagement

- ◆ Vital part of the planning process
- ◆ Be creative in where you get input
 - ◆ Specific groups/people who need to be involved
 - ◆ Think outside the box on who and where
 - ◆ If you are going to ask elected officials to adopt the plan, they must be part of the process! (Should be still be included even if you're not asking them to officially adopt it.)
 - ◆ Make use of other people's contacts/networks
- ◆ Be creative in how you get input

You

Your Contacts

Your Contacts

Your Contacts

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STATE HISTORIC
PRESERVATION
OFFICE
/ IDAHO STATE
HISTORICAL SOCIETY

Public Engagement

- ◆ Vital part of the planning process
- ◆ Be creative in where you get input
- ◆ Be creative in how you get input
 - ◆ Surveys – Online? Hard-copy? Both?
 - ◆ Stakeholder meetings
 - ◆ Public meetings/open houses

Community Surveys

◆ Benefits

- ◆ Fairly low effort once they're written
- ◆ *Can* get a wide response
- ◆ Very familiar method (doesn't freak people out)
- ◆ Very easy to tabulate the results (especially digital)
- ◆ You don't have to be there

◆ Drawbacks

Community Surveys

- ◆ Benefits

- ◆ Drawbacks

- ◆ Limited to people who get the survey and actually care enough to respond
- ◆ Limited by the questions you ask, little opportunity for flexible responses
- ◆ Hard to clarify questions
- ◆ Individualistic, not collaborative
- ◆ Can be confusing for non-HP people

Community Surveys

“Why is Historic Preservation important to you?”

- ◆ Very generic; assumes it *is* important to them
- ◆ Fairly standard set of answers
- ◆ Unless you evaluate each response separately, can't really determine how knowledgeable respondents are about HP

Community Surveys

On a scale of 1-10, how beneficial do you feel Historic Preservation is to:

Community Character

Local Tourism

Economic Development

Sustainability

(etc.)

- ◆ Makes people think about each area
- ◆ Helps you determine which areas are in need of more public education

Community Surveys

How familiar are you with the historic resources in your community?

I'm very familiar

I'm pretty familiar

I'm somewhat familiar

I'm not really familiar at all

◆ Helps gauge public awareness/knowledge of resources

Stakeholder Meetings

- ◆ Have both supporters and detractors
- ◆ Should only be 8-10 people max, with only a few Staff/HPC members (2-3) present at each
- ◆ Have a list of prompt questions ready, targeted to each group's concerns
- ◆ Try not to repeat too many of the survey questions; use this time to drill down on specifics
- ◆ Not the time for hashing out issues or debating policy; intended as a time to listen to their thoughts and concerns

Stakeholder Meetings

◆ Benefits

- ◆ Very focused discussion, with specific stakeholder groups
- ◆ Helps them feel like they have a direct voice
- ◆ A lot more detail, and much more flexible
- ◆ May get people who would not otherwise participate

◆ Drawbacks

Stakeholder Meetings

- ◆ Benefits

- ◆ Drawbacks

- ◆ Far more time consuming – planning, coordinating, holding the meetings
- ◆ Have to very carefully consider who to invite to each stakeholder group; try to avoid getting in the middle of any local political or business issues
- ◆ May walk out of there feeling like the detractors have spent the entire time “beating up” on you; very frustrating

Possible Stakeholder Groups

- ◆ Business Association(s) and business owners (especially those in historic buildings/areas)
- ◆ Neighborhood residents/groups (historic and non-historic neighborhoods)
- ◆ Educators
- ◆ County/City Department heads/representatives
- ◆ County Commissioners/City Council
- ◆ Local contractors
- ◆ Non-profits
- ◆ Others?

Open Houses

- ◆ Great way to try and get “general public” involved in the process
- ◆ Very familiar to people (not going to scare them out of participating)
- ◆ Can be very effective, but needs to be carefully planned and organized

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- ◆ Can be very effective, but needs to be carefully planned and organized . . . otherwise it can be a lot of time and effort for very little real reward

Open Houses: What We Envision



Open Houses: The Usual Result



Open Houses: Is There Another Way?



Getting People to Show Up

- ◆ Advertise, advertise, advertise!!!
- ◆ Do more than one
- ◆ Partner with other events
- ◆ Make them interactive

Getting People to Show Up

- ◆ Advertise, advertise, advertise!!!
 - ◆ Newspapers, radio, websites
 - ◆ Community organization newsletters/bulletin boards
 - ◆ Local NPR affiliate
 - ◆ Local news stations – have to make it a story!
 - ◆ Facebook and Nextdoor
- ◆ Do more than one
- ◆ Partner with other events
- ◆ Make them interactive

Getting People to Show Up

- ◆ Advertise, advertise, advertise!!!
- ◆ Do more than one
 - ◆ Multiple days – not just during HPC meeting
 - ◆ Different times – not everyone can make it at 5pm
 - ◆ Different locations – it's a large city/county; use it all!
- ◆ Partner with other events
- ◆ Make them interactive

Getting People to Show Up

- ◆ Advertise, advertise, advertise!!!
- ◆ Do more than one
- ◆ Partner with other events
 - ◆ Farmer's Markets?
 - ◆ Annual festivals?
 - ◆ Museum events?
- ◆ Make them interactive

Getting People to Show Up

- ◆ Advertise, advertise, advertise!!!
- ◆ Do more than one
- ◆ Partner with other events
- ◆ Make them interactive

Getting People to Show Up (And Stay Awake!)

- ◆ Advertise, advertise, advertise!!!
- ◆ Do more than one
- ◆ Partner with other events
- ◆ Make them interactive to help keep things like this from happening!



Make Them Interactive



Make Them Interactive

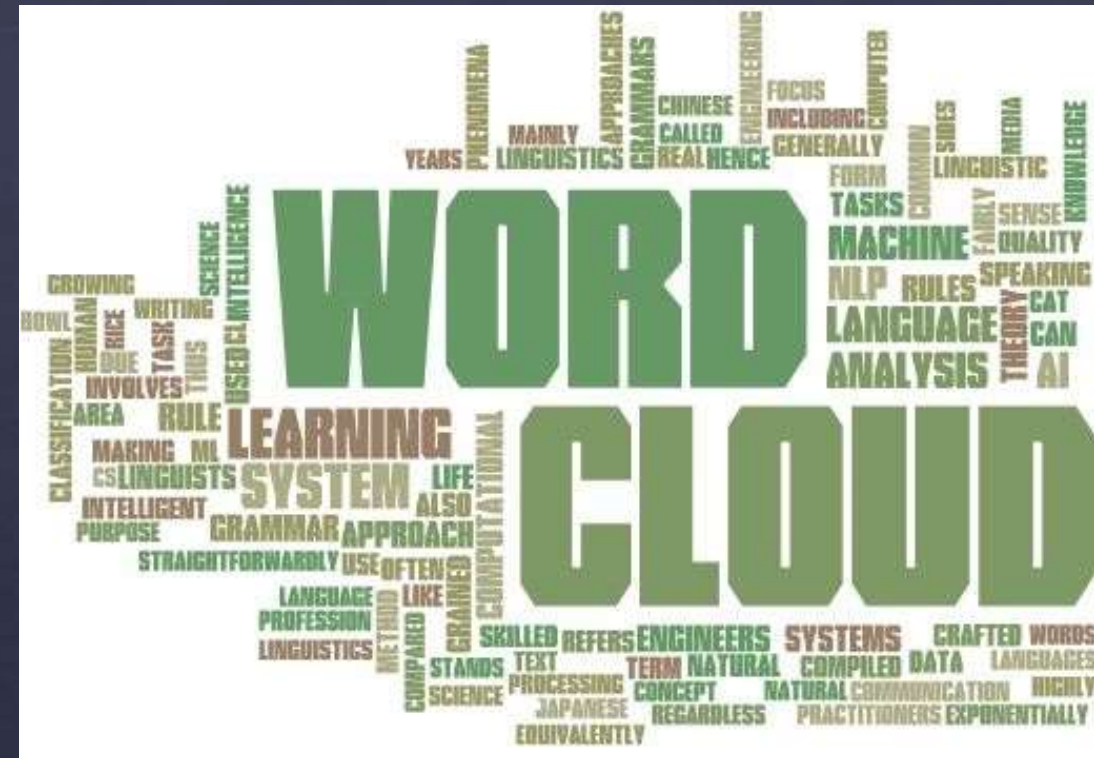


Make Them Interactive

- ◆ Think about ways you can take your survey questions and make them a physical activity
- ◆ Mapping Exercises – Favorite Building or Neighborhood; Area(s) We Want to Show Off to Visiting Family; My Story Happened Here; I Really Don't Want to Lose this Building; etc.
- ◆ Word Clusters – 2 “walls”: “HPC Is” and “HPC Should”; 2 sticky notes/person per wall

Make Them Interactive

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The Piggy Bank Exercise

- ◆ Each person gets set amount of (fake) money
- ◆ Have to distribute it amongst the piggy banks



The Piggy Bank Exercise

- ◆ Each person gets set amount of (fake) money
- ◆ Have to distribute it amongst the piggy banks . . . and there's not enough money to fund everything!
- ◆ Focus on determining operational priorities



The Piggy Bank Exercise

- ◆ Can be adapted to HP planning
- ◆ “You have X hours of staff time/support, and Y hours for each commissioner each month. Where should we ‘spend’ those hours?”
- ◆ “Banks” can include: Public Presentations; Workshops; New NR Nominations; Historic Design Assistance/Advice; Pursuing Design Review Legislation; Advising City Council; Advising other City Boards; etc.

Open Houses: Consider Atmosphere

- ◆ Open House “Draws”
 - ◆ Music or entertainment
 - ◆ Refreshments
 - ◆ Raffle for event tickets/gift certificate/prize (ideally, you’ll get a partner to donate the prize)
- ◆ Location and Space Used
 - ◆ Historic/iconic building?
 - ◆ Is it clean? Welcoming?
 - ◆ It is easy to get to?
 - ◆ Does it have good parking/access?

Open Houses: Consider Atmosphere

Which room would you rather be in?



Exploring the Data: An Initial Look

- ◆ This is going to take a lot of time – more than you would initially think
- ◆ Take some time to organize it
- ◆ What are the common themes?
- ◆ Are there any holes in the data?
- ◆ Refer back to it on a regular basis

The Real Planning Cycle



Drafting the Vision Statement

- ◆ Difference between Mission Statement and Vision Statement
 - ◆ Mission – “This is who we are and what we’re supposed to be doing.”
 - ◆ Vision – “This is what we want things to look like when we reach the end of this plan.”
- ◆ It’s okay to have it be a little “pie-in-the-sky”

Drafting Your Goals

◆ Should all grow out of the Vision Statement

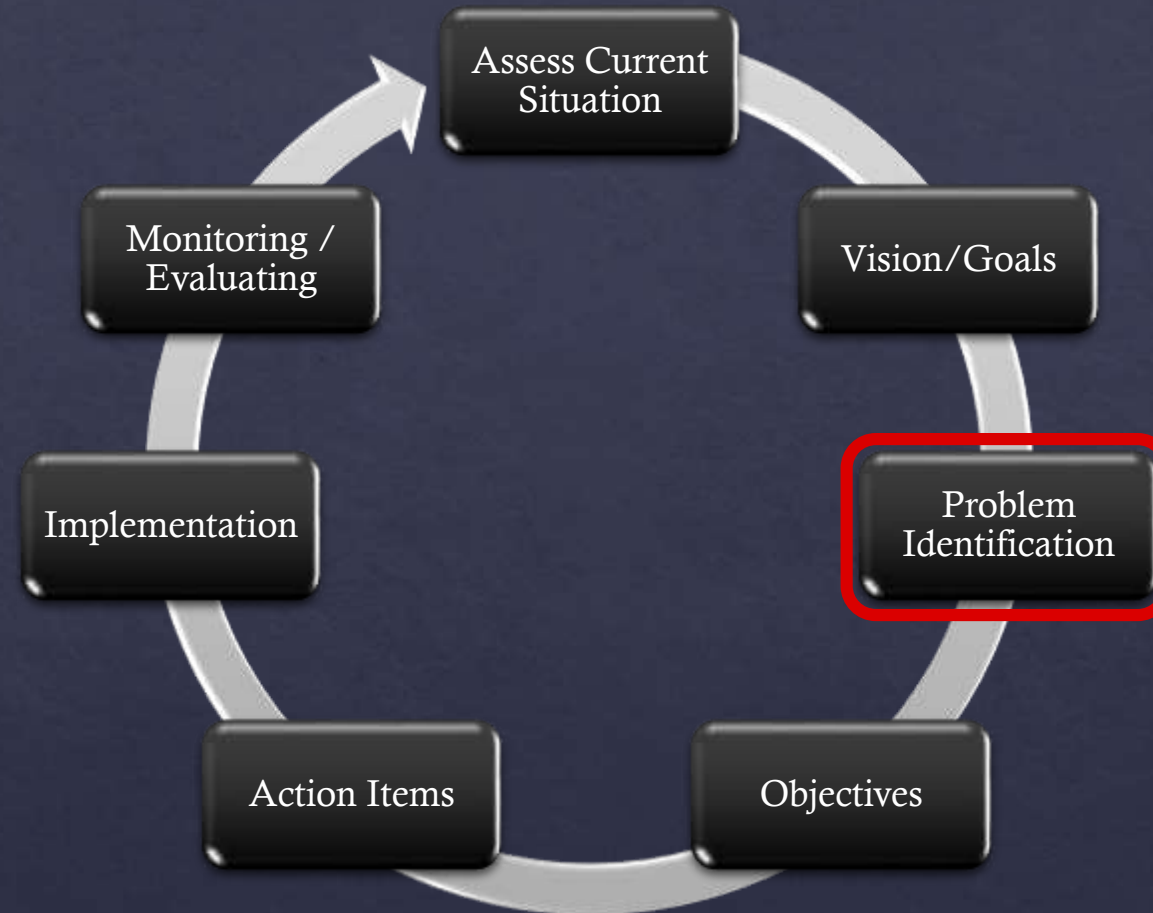
“Our Vision says we will have ‘This Thing.’
To get to ‘This Thing,’ we need A, B, and C.
So, our Goals are A, B, and C.”

◆ From the SWOT: *“Focus on the ‘What,’ not the ‘How’ and ‘Why’”* –
well, this is the first piece of the “How”

“Drafting” the Vision and Goals

Nothing is set in stone. Don't be afraid to change or modify your Vision Statement and Goals as you go.

The Real Planning Cycle



Identifying the Problems

- ◆ Consider all of the input and self-evaluations you've done so far
- ◆ Rely heavily on everything you've learned through the SWOT process
- ◆ What things will prevent/are preventing you from achieving your Vision and Goals?
- ◆ From the SWOT: *“Focus on the ‘What,’ not the ‘How’ and ‘Why’”* – now we're on the “Why”

The Real Planning Cycle



Drafting the Objectives

- ◆ The conceptual measures to address Identified Problems preventing you from reaching the Goals

“To make Goal A into a reality,
we need to address Problems 1, 2, 3, and 4.
Objectives 1, 2, 3, and 4 will help us do that.”

- ◆ Back on the SWOT “How,” just in more focused way

The Real Planning Cycle



More Public Engagement

- ◊ Go back out to the public, stakeholder groups, City Council or County Commissioners, Departments, etc.
- ◊ This is NOT a repeat of the Assess Current Situation phase of the process

“We’re pretty sure this what we understood from all of you during the first public engagement efforts.

Did we understand you correctly?

Did we missing anything?

Does it sound like we’re on the right track?”

More Public Engagement

- ◆ This your reality check before you actually write the plan
- ◆ Also helps to remind the public that you are working on this, helps them see how their input is shaping the plan
- ◆ Tell people what led you to your conclusions so far
- ◆ Based on feedback, revise/expand/rethink your drafted Vision, Goals, and Objectives

The Real Planning Cycle



Action Items

- ◆ These are the nuts-and-bolts of how you are going to do everything; your “To-Do” list

“Here are the things we need to do
to complete Objective 1.”

- ◆ Not necessarily step-by-step; think more of puzzle pieces – they are all needed to see the picture, but they don’t necessarily have to be connected in a specific order

Action Items

- ◆ These are the nuts-and-bolts of how you are going to do everything; your “To-Do” list

“Here are the things we need to do
to complete Objective 1.”

- ◆ Not necessarily step-by-step; think more of puzzle pieces – they are all needed to see the picture, but they don’t necessarily have to be connected in a specific order (although having the boarder first can help!)

Actually *Writing* the Plan (Finally!)

- ◆ Now it's time to bring it all together into a single document
- ◆ Topics to cover/things to include
 - ◆ Background – narrative of current situation, and how you got there
 - ◆ The Data – narrative of the data you collected and what it means
 - ◆ The Process – narrative of how you went about getting all the information, and developing the plan
 - ◆ The Plan! – laying out the Vision, the Goals, Objectives, and Action Items

Walk Away!

Take a break from the Plan
for at least a week
(but no more than a month)

Walk Away!

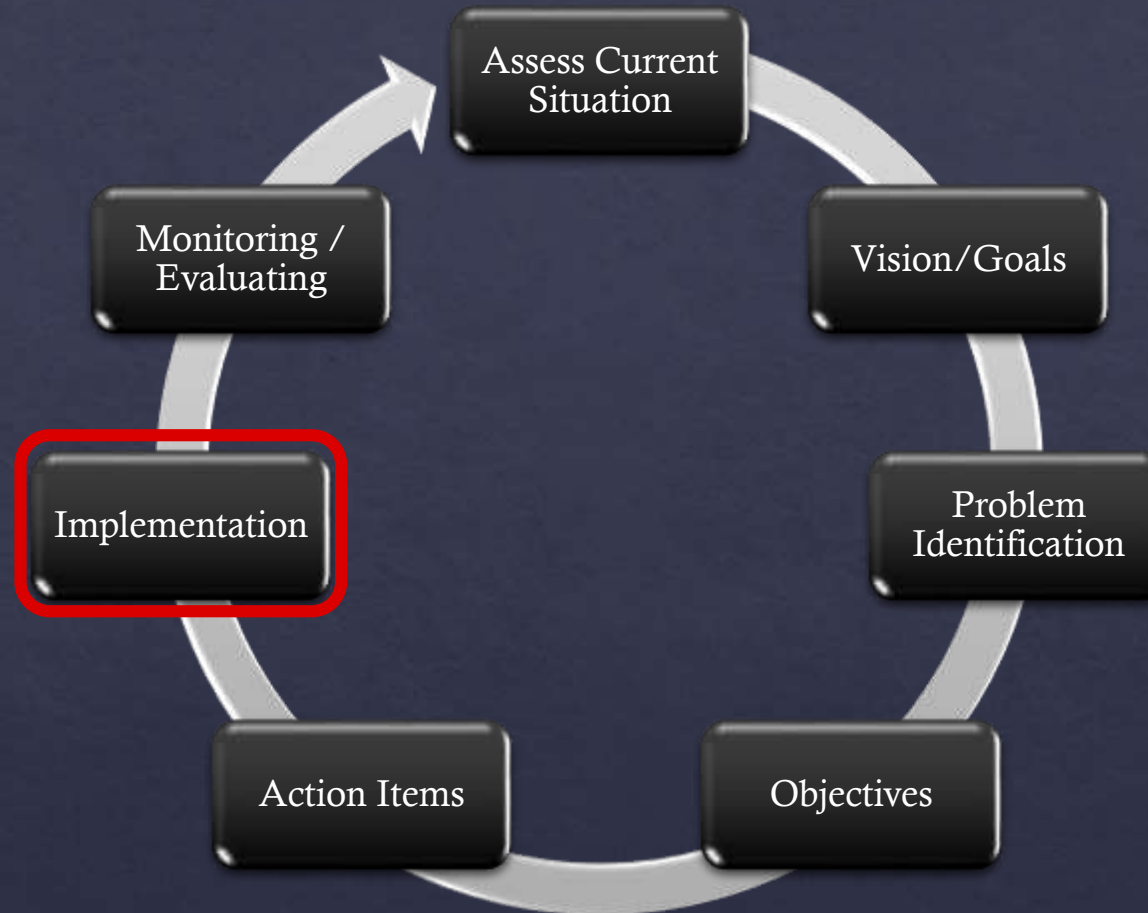
Take a break from the Plan
for at least a week
(but no more than a month)

Okay, back at it!

Actually *Writing* the Plan (Finally!)

- ◆ Come back to the Plan, look at it with fresh eyes
 - ◆ Did you get in everything you wanted to get in?
 - ◆ Does it make sense?
 - ◆ Check for spelling and typos!
- ◆ Consider bringing in “outsiders”
 - ◆ Often will catch things you’ve missed
 - ◆ Will help you determine if it will be a useful plan for people *other* than just the HPC

The Real Planning Cycle



Implementing the Plan

- ◆ Implementation Matrix/Action Plan
- ◆ Get it adopted
- ◆ Distribute the Plan
- ◆ Use it!

Implementation Matrix/Action Plan

- ◆ Determine time-frame for each action item
 - ◆ Look for Easy Victories; Linchpins; High Profiles
 - ◆ Immediate; On-Going; Long-Range
 - ◆ Within 6 months; 6 months–2 years; 2–5 years
- ◆ Organize Matrix

Implementation Matrix/Action Plan

- ◆ Determine time-frame for each action item
- ◆ Organize Matrix by: Goals/Objectives/Action Items

Goals	Policy Objectives and Action Steps	Priority	Ongoing	Long-range
Goal 1: Cultivate Public Awareness and Partnerships	Policy Objective 1.A: Increase Access to Information			
	Action 1.A.1: Create HPC website			
	Policy Objective 1.B: Raise Awareness and Promote Preservation Education			
	Action 1.B.1: Nominate threatened buildings to for Preservation Idaho's Orchids & Onions			
	Action 1.B.2: Recognize good rehabilitation efforts			
	Action 1.B.3: Arrange rehabilitation skills training workshops			
	Action 1.B.4: Arrange for annual public workshop regarding preservation, its impacts, and its benefits			
	Policy Objective 1.C: Improve Partnerships and Collaboration			
	Action 1.C.1: Encourage public participation in the preservation program			
	Action 1.C.2: Cultivate economic development partnerships and integrate historic preservation into economic development efforts			
	Action 1.C.3: Develop a preservation consortium			
	Action 1.C.4: Investigate opportunities with the Pacific Northwest Preservation Partnership.			

Implementation Matrix/Action Plan

- ◆ Determine time-frame for each action item
- ◆ Organize Matrix by: Goals/Objectives/Action Items; Priority level

Level of Priority	Policy Objectives and Action Steps	Priority	Ongoing	Long-range
Priority	Action 1.A.1: Create HPC website			
	Action 1.C.1: Encourage public participation in the preservation program			
	Action 1.C.4: Investigate opportunities with the Pacific Northwest Preservation Partnership.			
	Action 2.A.3: Create website for cultural activities & historic sites countywide			
	Action 3.A.1: Develop Survey Plan			
	Action 3.B.1: Expand Membership			
	Action 3.B.2: Staff & HPC continued training			
	Action 3.B.3: Establish Computer Database for all documented historic resources			
	Action 3.C.2: Keep County/City departments/boards apprised of HPC actions & policies			
	Action 4.A.3: Initiate participation in Idaho Main Street program			

Implementation Matrix/Action Plan

- ❖ Determine time-frame for each action item
- ❖ Organize Matrix by: Goals/Objectives/Action Items; Priority Level; or BOTH

Goals	Policy Objectives and Action Steps	Priority	Ongoing
Goal 1: Cultivate Public Awareness and Partnerships	Policy Objective 1.A: Increase Access to Information		
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	Action 1.B.2: Recognize good rehabilitation efforts		
	Action 1.B.3: Arrange rehabilitation skills training workshops		
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	Action 3.A.1: Develop Survey Plan			
	Action 3.B.1: Expand Membership			
	Action 3.B.2: Staff & HPC continued training			
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	Action 3.C.2: Keep County/City departments/boards apprised of HPC actions & policies			
	Action 4.A.3: Initiate participation in Idaho Main Street program			

Implementation Matrix/Action Plan

RECOMMENDATION	IMPLEMENTATION AREA	INVOLVED PARTIES	TIME FRAME	FUNDING SOURCES
GOAL 1: IMPROVE THE IMAGE OF THE CITY AS AN EXCELLENT PLACE TO DO BUSINESS				
1.1 Position Binghamton as a leader in the region	Citywide	Mayor's Office; Binghamton Economic Development Office (BEDO); Southern Tier Regional Economic Development Council (STREDC); Broome County Industrial Development Authority (BCIDA); Greater Binghamton Chamber of Commerce	Within 1 Year	New York State Consolidated Funding Application (NYS CFA); BEDO/BLDC Marketing Budgets;
1.2 Develop professional branding strategy	Citywide	Mayor's Office; BEDO; Binghamton Student Design Agency	Within 1 Year	BEDO Marketing Budget
1.3 Restructure economic development office to help businesses navigate the system	Citywide	Mayor's Office; BEDO	Within 1 Year	Not Applicable
1.4 Seek "shovel ready" designation for Charles Street Business Park	Charles Street Business Park	Planning, Housing & Community Development (PHCD); BEDO; BCIDA	Within 1 Year	First Ward Brownfield Opportunity Area (F-W BOA) funds; NYS CFA; Southern Tier Infrastructure Fund for Shovel Ready Sites
GOAL 2: LEVERAGE RAIL AND BRANDYWINE BOA FOR JOB GROWTH				
2.1 Create an industrial preservation area within the Brandywine Industrial corridor	Brandywine BOA	PHCD; BEDO	TBD*	Not Applicable
2.2 Focus site acquisition efforts on the Brandywine BOA	Brandywine BOA	Broome County Land Bank; BC IDA; Binghamton Local Development Corporation (BLDC);	Within 1 year	Broome County Land Bank, Office of Attorney General Community Revitalization Initiative Funds, EPA Assessment and Cleanup Grants, BC IDA, REDC, BLDC
2.3 Obtain "shovel ready" certification for sites in Brandywine Industrial corridor	Brandywine BOA	BC Planning; BCIDA	Within 1 year	Existing BOA funds; Southern Tier Infrastructure Fund for Shovel Ready Sites
2.4 Leverage freight rail to attract businesses in the distribution cluster and intermodal businesses	Citywide	BC Planning; PHCD; BEDO; BCIDA	Continued effort	No or limited cost; existing BOA funds for marketing
2.5 Use tools such as BOAs and I/I credits for redevelopment	Citywide; BOAs	PHCD; BEDO; BC Planning; BC IDA	Within 1 year	EPA Assessment and Cleanup Funds; existing BOA funds; BC Brownfield Cleanup Fund
2.6 Support the development of targeted workforce development training programs to prepare Binghamton residents for jobs created	Citywide	Broome-Tioga Workforce NY; NYS DOL; Southern Tier Economic Partnership (STEP); BEDO	Within 1 year	Not Applicable

Implementing the Plan

- ◆ Implementation Matrix/Action Plan
- ◆ Get it adopted
 - ◆ Carries more weight if City Council has officially approved it
 - ◆ Adopted as amendment to City's Comp Plan (additional level of legal defense if needed)
- ◆ Distribute the Plan
- ◆ Use it!

Implementing the Plan

- ◆ Implementation Matrix/Action Plan
- ◆ Get it adopted
- ◆ Distribute the Plan
 - ◆ County Commissioners, Department Heads, etc.
 - ◆ Partner organizations
 - ◆ Online
 - ◆ Stakeholder groups?
 - ◆ Key members of the community?
 - ◆ Any person/group listed in “Involved Parties”
- ◆ Use it!

Implementing the Plan

- ◆ Implementation Matrix/Action Plan
- ◆ Get it adopted
- ◆ Distribute the Plan
- ◆ Use it!
 - ◆ Refer back to the Plan in everything you do
 - ◆ “How does this action/project fit into the plan?”
 - ◆ HPC Committees (Standing or Ad Hoc)

Warning: Don't Get Locked In
Don't not do something important just
because it isn't in the plan!

Just because my map shows me driving directly to Idaho Falls from Boise doesn't mean that I can't take a quick detour to Atomic City because I get a call along the way that something important is going on!

The Real Planning Cycle



Monitoring/Evaluation

- ◆ Monitoring: Keeping track of how you're doing
 - ◆ At the start of each “year,” dedicate time to laying out the coming year's priorities
 - ◆ Include “Plan Implementation Update” on meeting agenda at least once a quarter (monthly if possible)
- ◆ Evaluating: How are we doing?
- ◆ End of Year report

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 - ◆ And **actually** discuss it! (No “no updates”)
 - ◆ At the end of each “year,” do a quick evaluation of progress
- ◆ Evaluating: How are we doing?
- ◆ End of Year report

Monitoring/Evaluation

- ◆ Keeping track of how you're doing
- ◆ Evaluating: How are we doing?
 - ◆ Refer back to Plan/Implementation Matrix
 - ◆ Where are we having success?
 - ◆ What do we need to improve on?
 - ◆ What conditions have changed?
 - ◆ What's holding us back?
- ◆ End of Year report

Monitoring/Evaluation

- ◆ Keeping track of how you're doing
- ◆ Evaluating: How are we doing?
 - ◆ Refer back to Plan/Implementation Matrix
 - ◆ Where are we having success? (**Strengths**)
 - ◆ What do we need to improve on? (**Weaknesses**)
 - ◆ What conditions have changed? (**Opportunities**)
 - ◆ What's holding us back? (**Threats**)
- ◆ End of Year report

Monitoring/Evaluation

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 - ◆ What do we need to improve on? (**Weaknesses**)
 - ◆ What conditions have changed? (**Opportunities**)
 - ◆ What's holding us back? (**Threats**)
 - ◆ Do we need to shift any priorities?
 - ◆ Are there activities we need to add?
- ◆ End of Year report

Monitoring/Evaluation

- ◆ Keeping track of how you're doing
- ◆ Evaluating: How are we doing?
- ◆ End of Year report
 - ◆ Public-facing report
 - ◆ Summarizes accomplishments of the previous year
 - ◆ Shows people that you took their input seriously
 - ◆ Reminder to everyone of the good work you're doing
 - ◆ Highlight potential efforts for the coming year

Monitoring/Evaluation

- ◆ Keeping track of how you're doing
- ◆ Evaluating: How are we doing?
- ◆ End of Year report
- ◆ And as we get to the end of the Plan's "life", look where we are again . . .

The Real Planning Cycle



“You mean we have to
do this *again?!?*”

Repeating the Cycle

- ◆ Plans are designed to only have limited life-span and time keeps marching on
- ◆ Situations change
 - ◆ Ideally, you've gotten a lot of the Goals, Objectives, and Action Items done
 - ◆ Changes to the community – City Council members, development projects, population changes, etc.
 - ◆ And HPC members change over time
- ◆ What's an appropriate life-span

Repeating the Cycle

- ◆ Plans are designed to only have limited life-span and time keeps marching on
- ◆ Situations change
- ◆ What's an appropriate life-span?
 - ◆ Depends on your community and your commission
 - ◆ Generally speaking, 5 to 10 years is normal
 - ◆ Too short, and you can't get enough done and you spend all your time planning (and planning for planning)
 - ◆ Too long, an plan becomes obsolete because too much has changed

“Wow, this is *a lot* of
work. Is it worth it?”

Is It Worth All the Work?

YES!

- ◆ Helps you focus your work
- ◆ Helps new HPC members understand what's going on
- ◆ Helps City Council/Mayor/other departments understand HP and help them with *their* planning
- ◆ Helps with pursuing funding

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Questions?

Governor Brad Little
Janet L. Gallimore, Executive Director
www.history.idaho.gov



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