

# PAS MEMO

## Implementation Project Assessment: A New Tool for Implementing Community Plans

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Has someone ever asked you, "What became of that plan?" Perhaps you have asked that question yourself. If so, you are not alone. A common challenge for the planning profession is when community plans don't live up to their potential. Planners often put tremendous effort into crafting thoughtful plans that reflect the views of diverse stakeholders, but then they struggle with implementation. Academic research reveals a key reason for this: implementation elements in plans are frequently weak or nonexistent (Berke and Godschalk 2009; Lyles et al. 2016).

The heart of most plan implementation sections is a table of recommended strategies and initiatives. In the authors' experi-

ence reviewing dozens of plans, this is often simply a laundry list of ideas. Some are on target, but others are infeasible for the community in which they are being proposed. In addition, the list of projects may far outstrip the agency's resources, often with no guidance on which measures are priorities. Finally, the plan frequently provides little to no direction on how to take the next steps forward on key initiatives. How do we avoid these pitfalls?

This *PAS Memo* presents a three-step process for identifying the right implementation strategies to advance the plan in a way that is workable for the sponsor organization and its partners (Figure 1). As might be expected, this process begins

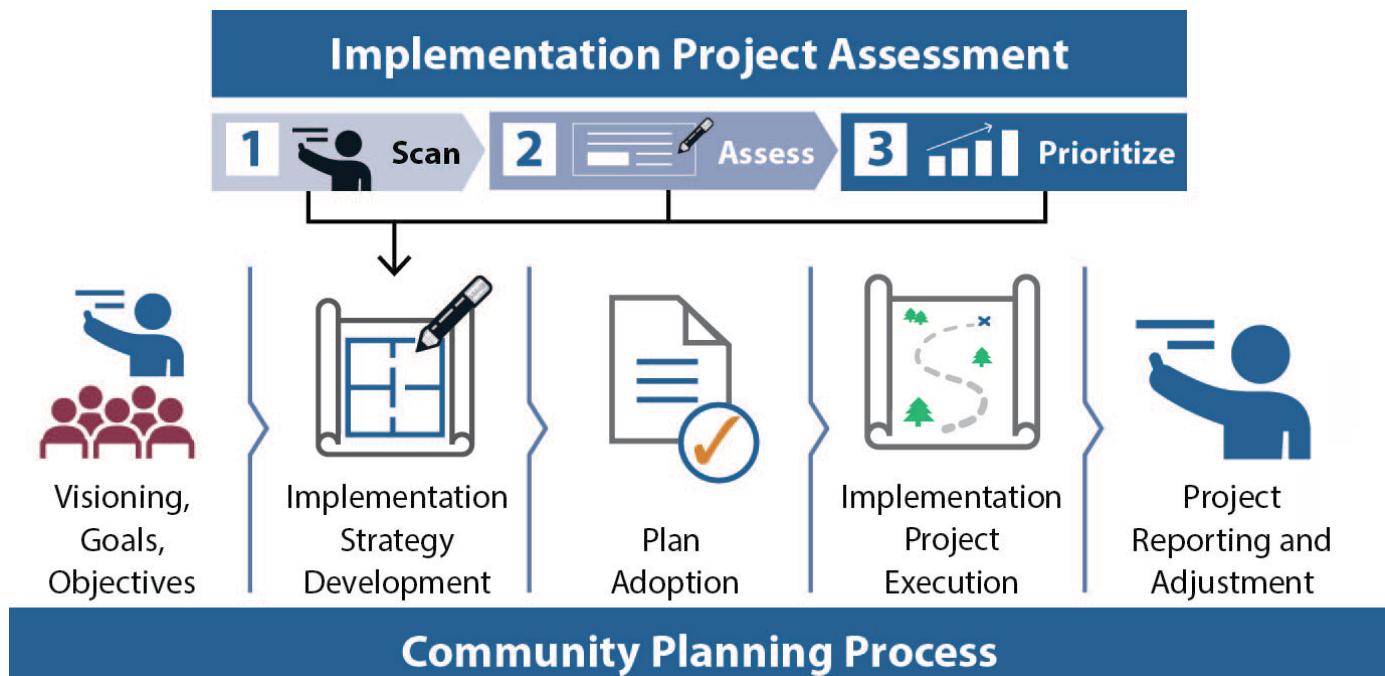


Figure 1. Planners can use the three-step implementation project assessment process—(1) scan, (2) assess, and (3) prioritize—to develop an effective plan implementation strategy (Authors)

by identifying potential actions for plan implementation. The second step consists of systematically vetting each potential implementation project to ensure alignment with the community's needs and the sponsor organization's capabilities and resources. In the third step, this draft list of vetted projects is shared with community stakeholders for review, feedback, and prioritization, resulting in a table of targeted short-term actions presented in a stand-alone document to help turn the plan from vision into reality. Together, these three steps form an implementation project assessment. By using this approach, planners can move successfully from planning to implementation and help deliver lasting improvements to their communities.

### **Identifying the Right Implementation Strategies: A Three-Step Approach**

When preparing a community plan, planners often start by summarizing existing conditions and working with the community to identify goals and objectives that articulate a shared vision for the future of the community. Then it is time to reach into the local government toolbox and select the measures needed to pursue this vision.

A number of potential actions are commonly available, but which ones are most appropriate for your plan and commu-

nity context? To make this determination, we recommend a three-step approach that invites planners to (1) scan, (2) assess, and (3) prioritize. Planners can use this approach to evaluate all potential implementation projects based on plan alignment, feasibility, and community impact, allowing them to identify the projects that will be the best candidates for successful plan implementation.

#### **Step 1: Scan for Promising Implementation Tools**

Start by scanning a range of potential implementation techniques to draft a preliminary list of practices that responds to the draft goals of the plan. The public input received through the planning process should inform this work and may have already generated some initial suggestions for possible projects. Implementation tools include local regulations, public and private investments, programs, partnerships, and follow-up studies and plans, among others (Table 1). Some regions and states may provide additional techniques, resources, and requirements to help shape how communities plan and develop. There are two ways to conduct this scan: a practitioner-driven approach and a stakeholder-driven approach.

Because understanding the workings and suitability of different types of implementation measures often involves a

**Table 1. Local Government Toolbox of Implementation Tools**

| <b>Implementation Tool</b>                    | <b>Examples</b>                                                                                                                                                                                                                                            |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Development regulations</b>                | Creating a new mixed-use zoning district; establishing an affordable housing requirement for new development; improving plan review procedures; creating a unified development ordinance                                                                   |
| <b>Capital investments</b>                    | Constructing a new sidewalk; building a community library; acquiring land for a new park; installing public wifi                                                                                                                                           |
| <b>Community projects</b>                     | Installing historical markers; conducting tree planting or other community beautification projects; converting several on-street parking spaces into a public parklet; marking a temporary protected bike lane to see if it encourages more bicycle travel |
| <b>Public education initiatives</b>           | Holding a webinar or speaker series on best practices for protecting local streams or how to construct a community garden; hosting an annual Citizens' Academy to educate community members on how local government works                                  |
| <b>Organizational policies and procedures</b> | Drafting an updated development review checklist; creating an internal procedure for how to review proposed rezonings for consistency with adopted community plans; developing a procedure for advertising public meetings                                 |
| <b>Community programs</b>                     | Establishing a Main Street business facade grant fund; subsidizing coworking space; sponsoring local nonprofit organizations                                                                                                                               |
| <b>Partnerships</b>                           | Teaming with local arts organizations to construct and program a cultural arts facility; working with a nonprofit organization to operate a local farmers market                                                                                           |
| <b>Studies</b>                                | Conducting a feasibility assessment for a new recreation center; developing preliminary recommendations on how to preserve historic resources in the community                                                                                             |
| <b>Special plans</b>                          | Conducting a small area plan for how to revitalize the downtown, or a corridor plan for a gateway into the community                                                                                                                                       |

## Addressing Equity in Plan Implementation

A key challenge for planners is making sure that comprehensive plans address the needs of traditionally underserved populations in the community, and that the goals and objectives of the plans are implemented through effective programs that continuously improve conditions on the ground. The [Urban Sustainability Directors Network](#) describes three key dimensions of this work: procedural equity to help all stakeholder groups participate fully and fairly in the planning process; distributional equity to make sure resulting benefits and burdens are fairly distributed across stakeholder groups, with particular attention to communities who could suffer disproportionate inequities and impacts; and structural equity to heal past harms and transform structural inequities moving forward.

The first step to addressing equity in the plan implementation process is for the community to **identify equity as a plan goal**. For example, the City of Denver's [Blueprint Denver](#) identifies and analyzes three equity concepts: improving access to opportunity, reducing vulnerability to displacement, and expanding housing and jobs diversity. Then it incorporates these considerations into its plan recommendations and establishes a system of metrics to track progress in addressing these issues over time. If a community addresses equity in its plan goals, then this consideration will cascade through the implementation project assessment process when the planning team checks potential strategies for alignment with plan goals.

A second place to address equity is when we **seek stakeholder input on the preliminary list of implementation strategies**. Working to engage traditionally underrepresented community members in this process is essential. Key strategies to do this include asking local leaders for input on how best to engage the community and arranging to meet with people in convenient and familiar sites in their neighborhood, such as places of worship, community centers, and senior facilities.

A third way to address equity is to **make equity a key consideration in identifying and selecting implementation projects**. In its 2021 [Raleigh Community Climate Action Plan](#), the City of Raleigh, North Carolina, invited staff and stakeholders to help create an Equity Impact Matrix using an approach adapted from the state of Georgia. Project participants conducted a high-level review of the impact of different potential implementation strategies on environmental, economic, and public health equity considerations. Austin, Texas, used a series of equity screening questions in its 2021 [Climate Equity Plan](#) to assess proposed actions and the degree to which they center equity. These techniques could be applied to potential plan implementation projects.

A fourth way to address equity is to encourage communities to **make equity a key consideration when organizing and conducting implementation projects**. For example, at a regional scale, Oregon's Portland Metro prepared its [Strategic Plan to Advance Racial Equity, Diversity, and Inclusion](#) in 2016, identifying five organizational goals:

- Metro convenes and supports regional partners to advance racial equity.
- Metro meaningfully engages communities of color.
- Metro hires, trains, and promotes a racially diverse workforce.
- Metro creates safe and welcoming services, programs, and destinations.
- Metro's resource allocation advances racial equity.

In 2017, Metro drafted a [Diversity Action Plan](#), and in 2018, it translated this into [departmental action plans](#) to operationalize these goals, recognizing that racial equity is the "backbone of good governance to ensure the success of everyone."

Finally, a fifth way to address equity is by **including equity as a key metric in the implementation tracking system used to measure plan impact** and results, and to inform potential program adjustments based on the results. A community might even conduct a special equity study to see how and where public infrastructure dollars are spent. For example, in 2017, the Central Baltimore Partnership, comprising more than 30 organizational partners, along with the Neighborhood Design Center, prepared [Front and Center: A 5-Year Equity Plan for Central Baltimore](#). This document includes recommendations on four key topic areas: youth and families, workforce development, community health, and housing. The plan also features a detailed implementation matrix with a timeline, partners, metrics/outcomes, estimated cost, and potential source of funds. In turn, the Baltimore Neighborhood Indicators Alliance at the University of Baltimore, in collaboration with the City of Baltimore's Department of Planning, drafted the [Equity Analysis of Baltimore City's Capital Improvement Plan, 2014–2020](#), which looks at indicators of distributional equity, transgenerational equity, procedural equity, and structural equity. The analysis includes tables and maps tracking where funds were spent in the city, and then draws conclusions and makes recommendations for the City moving forward. The project partners prepared an update to the analysis in 2019. The results of such analyses could be used to adjust plan implementation projects to make them more equitable.

Buncombe County, North Carolina, is working to track equity on the ground through the plan implementation process, focusing on the potential equity impacts of new development projects. It has created a [Community Index Map](#) as part of its [Comprehensive Plan 2043](#) to help it identify parts of the county where there is an opportunity to advance equity based on income levels, food insecurity, educational attainment levels, and other factors. The County is combining this with an equity analysis tool consisting of key questions for staff and decision-makers to use in analyzing proposed development projects to help manage change in these parts of the county and prevent gentrification and displacement of residents.

In these ways, a community can help ensure that its plans address equity in systematic and meaningful ways that extend into plan implementation.

significant amount of technical information and knowledge, the planning team may want to use a **practitioner-driven approach** to generate an initial list of strategies to then share with community stakeholders for feedback. In such cases, the community may be looking to “the experts” to generate an initial list for them to consider. There are two methods for planners to consider within a practitioner-driven approach, which can be used individually or in combination:

- **Leadership team method:** The planning team generates an initial list of potential implementation actions that are then presented to department heads and upper management for review and feedback.
- **Community-informed method:** The planning team generates an initial list of potential implementation actions that are then presented to community members for review and feedback.

This approach can be fast and efficient, but it may be potentially less empowering for community stakeholders. In some cases, the planning team may want to use a **stakeholder-driven approach** that involves stakeholders from the outset of the strategy identification process to maximize the opportunity for stakeholder empowerment and input from community members who have considerable lived knowledge and insight. Within a stakeholder-driven approach, planners can consider these methods:

- **Advisory committee method:** The planning team facilitates a process to generate an initial list of implementation items with a plan advisory committee composed of community stakeholders.
- **Equity-centered method:** The planning team facilitates a process to generate an initial list of implementation items through a broader stakeholder engagement process that includes traditionally underrepresented populations in the community.

A key consideration throughout this step of the process is equity. While some implementation strategies are closely aligned with equity considerations—for example, measures to build more affordable housing—many are largely agnostic on the question of equity, and the extent to which they advance or hinder this goal depends on the details of how the tool is structured and where it is used in the community. Inclusiveness and equitable outcomes should always be important considerations when generating ideas for potential implementation strategies and actions. The sidebar on p. 3 offers more guidance on creating equitable plans and plan outcomes.

By soliciting stakeholder input through the four methods described above, planners can build public involvement in this work and identify a range of potential implementation projects informed by people knowledgeable in local community assets. This can be done both in person and online. For example, the planning team could invite stakeholders to suggest implementation ideas for each of the draft goals of the plan at an

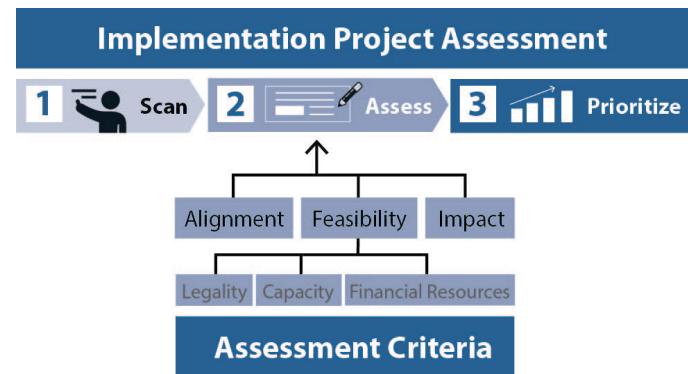


Figure 2. The assessment process evaluates all of the potential implementation projects identified in the initial scan for alignment, feasibility, and impact (Authors)

in-person workshop using sticky notes placed on posters; in an online workshop using engagement software, such as [Canva](#) or [Mural](#), or with smartphone polling, using software such as [Poll Everywhere](#) or [Mentimeter](#); or through an online survey, using apps such as [SurveyMonkey](#) or [Qualtrics](#), accessible through a project website or links in emails and social media posts. Whatever approaches the planning team uses, it should make sure to engage traditionally underrepresented community members in the process to broaden the input received and help ensure the list of practices is equitably developed and informed.

### Step 2: Assess the Suitability of Potential Projects

While casting a wide net in the scan of implementation tools is important, this often results in a laundry list of different practices. And there is often pressure to include as many projects identified by stakeholders as possible in an effort to avoid saying “no.” Some of these may be well positioned to advance plan implementation, but others may not be.

To be effective, implementation measures must address some key considerations. A systematic review of *alignment*, *feasibility*, and *impact* will help the planning team vet the preliminary list of potential implementation projects and select the ones that are most appropriate for inclusion in the plan (Figure 2). Conducting an assessment using these three factors will help the planning team focus on the most appropriate, realistic, and effective options within the initial laundry list of potential implementation projects and set implementation efforts up for success.

1. **Alignment:** Whether the proposed action, if implemented, will help advance plan goals. This consideration often gets addressed to a significant degree in Step 1 with initial strategy identification, but it is a good idea to systematically probe more deeply to confirm this. To facilitate this, consider organizing implementation projects under the primary goals and objectives in the plan that they would advance. This format can help readers find the proposed action items that support the goals they care

most about. In this structure, the goals serve as a pathway into the plan to help audiences connect with the more technical information contained in the actions. Alignment should also look at political considerations. Are there potential stakeholder champions for a particular implementation strategy, or is there the potential for active opposition that could impede successful implementation of a given tool?

**2. Feasibility: Whether the project is actionable given the resources, capacity, and expertise of the local government and its organizational partners or consultants.**

This critical consideration fundamentally impacts the success of implementation. Dimensions of this consideration include the following, which together can roll up into an assessment of overall feasibility rated for each potential implementation project as high, medium, or low:

- **Legality.** Is the tool legal under state and federal law?
- **Capacity.** Do the plan sponsor organization and its partners have the technical capability and staff capacity to carry out the action? And if not, do they have the financial resources to hire the necessary consultants?
- **Financial resources.** Do the sponsor organization and its partners have the financial capacity to make the public investments necessary to carry out the action? For more expensive projects, it may be helpful to conduct a financial capacity analysis to examine annual revenues and expenses, fund balance, and existing debt and when it is scheduled to be paid off. It may also be helpful to identify an annual funding allocation that can be dedicated to plan implementation in the annual budget to make consistent progress on priority projects. Projects that exceed the jurisdiction's financial capacity don't necessarily need to be removed from the list of implementation projects; they could be designated as potential initiatives in later years to allow for the possibility that a new source of third-party funding will be identified to help make them feasible. Sometimes an injection of outside resources can elevate a proposed implementation project and enable the community to make

beneficial improvements that would not have been possible otherwise.

**3. Impact: The extent to which the action will have a positive, meaningful impact on implementing the plan.**

Some strategies, such as preparing a major ordinance update, may have a large impact by themselves, but often require significant time and resources, and sometimes necessitate a special budget allocation. Other actions may be less impactful but relatively easy to accomplish using discretionary funds, such as installing a historic marker, and can help maintain or build the energy and support to take more substantive action later. As a result, a strong portfolio of implementation measures often includes a mix of strategies of varying degrees of difficulty with varying levels of impact to enable both steady and demonstrable progress with plan implementation.

To assist in conducting this assessment, planners can prepare a vetting spreadsheet with a row for each potential implementation project and a column for each evaluation criterion, and then fill it out as they gather information from key staff and stakeholders (Table 2).

Consultant teams leading a planning process often will not have all of the information necessary to conduct this assessment. Even if they do, the process can benefit from the input and buy-in from those who will be responsible for implementing the plan. Therefore, an essential step is to hold several vetting meetings with an implementation project review team comprising planning and other key staff. Consider including the planning director and project manager, as well as a top administrator, such as the town manager or assistant town manager, and someone with significant capital project experience, such as the public works director, town engineer, or parks and recreation director.

The initial list of implementation projects may include dozens of potential ideas, so the review often needs to be done in an expedited manner, with the implementation project review team using its best professional judgment to evaluate which actions to include in the plan. Based on the experiences of the authors, two two-hour meetings are generally needed to introduce the vetting process, talk through each of the project

**Table 2. Sample Vetting Spreadsheet for Potential Implementation Projects**

| Project                  | Alignment                                                    | Feasibility                                      |                                                                                                     |                                                              | Impact                                                            | Overall Assessment                                                                           |
|--------------------------|--------------------------------------------------------------|--------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
|                          |                                                              | Legality                                         | Capacity                                                                                            | Financial Resources                                          |                                                                   |                                                                                              |
| Name of proposed project | Will this project advance plan goals and have local support? | Is this project legal under state and local law? | Do local staff have the time and technical capacity for this project, or can they hire consultants? | Are there financial resources available to fund the project? | How much positive impact will this project have on the community? | Is this a feasible, well-aligned project with community impact to include in the final plan? |

ideas to decide which ones to keep, and conduct a preliminary prioritization of the resulting list by identifying which projects should start in the short term (one to two years after plan adoption), medium term (three to five years after adoption), and long term (six to 10 years after adoption).

If the implementation project review team is having trouble reaching agreement on which projects are suitable for implementation, or if the planning team wants to involve other staff or participants in a more systematic and defensible manner, using a scoring system to evaluate the proposed projects more formally across the different evaluation criteria may be helpful. One approach would be to rate each project's alignment, feasibility (legality, capacity, and financial resources), and impact as "High" (3 points), "Medium" (2 points), and "Low" (1 point), and tally up the resulting score.

The City of Port Angeles, Washington, used a scoring system as part of its 2022 [Climate Resiliency Plan](#). It scored each potential implementation project based on its impact, equity, affordability, feasibility, community support, and co-benefits to generate an overall score. Charleston, South Carolina, did something similar in its [Climate Action Plan](#) using 10 different assessment criteria that were evaluated by a special task force. The quantitative evaluation of a scoring approach can help build agreement on which projects to include in the implementation portfolio. At the same time, this more formal approach takes time and resources, and the planning team may have difficulty finding many participants who have the expertise to make a reasonable evaluation across a wide range of potential tools, so the technique should be used judiciously.

However a community chooses to approach the project vetting process, the outcome should be a draft portfolio of implementation projects that are well aligned to advance the goals of the plan, that are feasible based on local resources, and that will have a measurable impact on the community. This is the vetted list of projects that will be included in the plan and prioritized in the final step of the process with input from community stakeholders and decision makers.

One common outcome of this project vetting process is to increase the familiarity and comfort level of the town or county manager, planning director, and other key staff with the resulting implementation approach. The experiences of the authors

suggest that this process is key to helping an agency move successfully from planning to implementation.

### **Step 3: Prioritize Implementation Projects with Stakeholder Input**

The third step in the process is to get stakeholder input on the proposed list of implementation projects to determine which projects to prioritize for action in the next two years or so. This can be done internally with key staff such as department heads, with elected and appointed leaders, and/or through a public stakeholder process, depending on community preferences and available resources.

Skipping this prioritization step can leave staff with an overwhelming jumble of potential projects. Six months or a year may go by without any substantive follow-up action as project staff and boards recover from the planning process, and by then the implementation effort may begin to lose steam. Additional time may be needed to re-engage the elected board to identify action priorities, further slowing the transition to implementation. Bringing forward priority projects that can be initiated in the short term for initial approval at the time of plan adoption avoids this outcome.

This step of the process provides an important opportunity to test implementation project ideas with stakeholders and decision-makers. A common way to do this is to present posters with proposed projects at a community workshop and invite stakeholders to use sticky dots or other means to vote on the top choices. Alternatively, the planning team can invite stakeholders to vote on which plan goals they would most like to see implemented and which short-term projects they think the community should prioritize for action. As a follow-up, the planning team can post an online survey asking these same questions to help capture input from community members who could not attend the in-person meeting.

Focus is essential to getting things done in an environment with limited resources. To make a successful transition from planning to action, the first two years after plan adoption are particularly important as this is about how long most local governments think ahead in their day-to-day operations. Therefore, the planning team should use the community input on prioritization gathered in this step to help create an implementation table of short-term actions that can be started one

**Table 3. Sample Funding Levels of Authority for the Implementation Table**

| <b>Symbol</b> | <b>Funding Level of Authority</b>                                                                                                  |
|---------------|------------------------------------------------------------------------------------------------------------------------------------|
| \$            | Able to be implemented using discretionary funding available to the planning director or other department head                     |
| \$\$          | Able to be implemented using discretionary funding available to the city manager or equivalent                                     |
| \$\$\$        | Requires a line item in the annual city budget developed by the city manager and approved by city council or other governing board |
| \$\$\$\$      | Requires a line item in the capital improvements program                                                                           |
| \$\$\$\$\$    | Requires third-party funding such as grants or partner resources                                                                   |

to two years after plan adoption. These should be projects that are easy to accomplish, address a pressing community need, have broad support, and will deliver results. Again, it is often helpful to include a mix of small and large projects to deliver early results that can build support for larger investments and more impactful measures. Because it is often difficult for stakeholders and staff to select a manageable number of projects to implement first, an additional goal for the planning team may be to narrow the list to the top three to five projects for initial implementation.

The final plan should include the portfolio of all the vetted implementation projects to show the full universe of short-, medium-, and long-term actions identified to implement the plan, and the implementation table of short-term projects should be provided in a separate document to help the staff move forward with an initial action agenda. This approach can help staff make necessary updates to information about the short-term projects without having to seek a formal plan amendment from appointed and elected boards each time it needs to make a revision. Together, these documents can help the planning director and upper management get clear policy direction from the governing board on which implementation

projects to advance first after the plan is adopted. This will enable them to move quickly in identifying and organizing the resources needed to carry out these initiatives. Getting this direction while community consensus exists on the comprehensive plan can help an agency proceed rapidly and smoothly to plan implementation.

We recommend that the planning team add supporting information to the implementation table of short-term projects to make it more actionable (see [Table 4, p. 10](#), and the sidebar below). For each priority project, the implementation table should provide the following information:

- A brief description of the project
- The lead agencies responsible for each measure
- An approximate timeline
- Potential funding sources and the projected level of action needed to authorize funding for each project (e.g., expressed with symbols corresponding to which authority can authorize project funding using what resources, as shown in Table 3, p. 6)
- Initial next steps to move the project forward

## Creating an Effective Implementation Table

The centerpiece of an effective implementation component for a comprehensive plan is the detailed implementation table. Here are some good examples:

- The City of Belmont, North Carolina's 2018 [Our Town Belmont Comprehensive Plan for Our Future](#) includes an action matrix that identifies actions, goals addressed, potential outcomes, measures of progress, next steps, potential partners, and timeframe.
- Denver also lists related plans and strategies for each action item in its [Comprehensive Plan 2040](#).
- Houston makes great use of icons to enhance readability in its 2020 [Resilient Houston](#) plan.
- Raleigh, North Carolina's [2030 Comprehensive Plan](#), updated in 2019, notes whether each project would require capital funds.
- Charleston, South Carolina's 2021 [Climate Action Plan](#) includes the approximate level of funding needed for each measure.
- Portsmouth, Virginia's [Build One Portsmouth 2018 Comprehensive Plan](#) takes this work even further, organizing "Tactics" under the corresponding "Vision," "Goals," and "Strategies," and then providing a more extensive description of each implementation tool, including the level of effort needed to use it, its current status in implementing the plan, and the strategies that it supports.

Prioritizing a manageable subset of projects is also important. The following plans offer good examples of this practice:

- Richmond, Virginia's 2020 city-wide master plan, [Richmond 300: A Guide for Growth](#), includes six "big moves" to expand equity, increase sustainability, and beautify the city.
- The Executive Summary for Newark, New Jersey's [Newark 360: Newark Citywide Master Plan](#) adopted in 2022 includes a very readable summary of key implementation measures, organized under themes, strategies, and actions.
- Seattle's 2017 [New Mobility Playbook](#) includes a set of 20 "first moves" or strategic actions to jump-start implementation and lay the foundation for long-term success.
- Apex, North Carolina's 2019 [Downtown Master Plan and Parking Study](#) calls out the top 10 implementation projects and provides more detailed written descriptions and mini checklists for how to implement each of them.
- The City of Charlotte presents its [2040 Comprehensive Plan](#), adopted in 2021, online in html format. This includes its [implementation strategy](#), which identifies short-term actions, as well as guidance on updating the Unified Development Ordinance, prioritizing capital investments, addressing fiscal considerations, and ensuring the necessary organizational capacity. There is also a special section on anti-displacement tools and strategies.

When the approach to plan implementation is presented in a readable format, with clear delineation of priority projects and guidance on how to take the next steps forward on each of them, a community is better positioned to transition smoothly from planning to implementation.

## Putting Process into Practice

The following sequence of steps summarizes a recommended way for a planning team to apply the Implementation Project Assessment process and carry out Steps 1–3, as described in this *Memo*, leading to plan implementation.

### Step 1: Scan

- A. Planning team brainstorms a preliminary list of potential implementation projects (practitioner-led approach) and/or solicits early input from community stakeholders using in-person and online techniques (stakeholder-led approach), organized under plan goals/objectives.

### Step 2: Assess

- B. Planning team sends the list to an implementation project review team (local planning staff and other key participants) and holds two vetting sessions to conduct the implementation assessment, evaluating project suitability based on alignment, feasibility, and impact.
- C. Planning team uses the results of the assessment to refine the list of projects into a portfolio of vetted potential implementation projects and prepares a preliminary prioritization based on timing, sorting projects as short-term, medium-term, and long-term.

### Step 3: Prioritize

- D. Planning team delivers presentation and holds real-time polling with a plan advisory committee of community stakeholders to get feedback on proposed short-term implementation projects.

This information can be very helpful in translating a potential project into a specific proposal for inclusion in the annual work plan or budget.

The result of this approach is that the community plan can function as a visioning document that is accompanied by a short-term implementation table with a focus on the first two years. This is enough information to clarify the short-term implementation priorities for local government staff so they can begin to organize and advance these projects. Then, whether it is included within the plan or as a separate document, the implementation element can be updated each year, with completed projects rolling off and medium- and long-term projects moving up to become short-term actions. As this occurs, more information can be developed about these projects based on current conditions to prepare them for successful implementation.

The work a planning team invests in developing a meaningful and workable set of implementation strategies can build support among decision-makers and community stakeholders and increase their confidence that plan recommendations can be successfully implemented. By following the three-step approach described above, communities can right-

- E. Planning team holds a public workshop using dot voting to gather prioritization feedback from community members on proposed short-term projects and conducts an online survey for prioritization feedback on short-term projects for community members who missed the workshop.
- F. Planning team summarizes this input and works with local planning staff to refine the implementation portfolio (organized by short-term, medium-term, and long-term timeframes), presents the proposed implementation portfolio to planning board and governing board for review and feedback, and finalizes the implementation portfolio based on input received.
- G. Planning team prepares a brief description of each implementation project for inclusion in the plan and creates a detailed table of prioritized short-term implementation projects as a companion document for board review and staff use.

### Plan implementation:

- H. Local planning staff initiates short-term implementation projects and updates the table of short-term projects as needed on a rolling basis.
- I. Local planning staff provides an annual update to upper management, appointed boards, and elected boards to report on implementation progress from the past year, describe what is planned for the year ahead, and discuss any course corrections.

size their plans and strengthen the link between planning and implementation. The sidebar on this page summarizes what it might look like for a planning team to put this three-step process into action.

As each implementation project moves forward, planning agencies can employ a variety of tools and strategies (see the sidebar on p. 9) to help secure the necessary resources, make important linkages, and help decision-makers and community stakeholders track progress. If done well, these efforts can maintain and build support for the resulting work and for subsequent implementation efforts.

Planners can strengthen the link between planning and implementation by taking several steps to help make this happen. They should work to build recognition of the importance of what comes after plan adoption, use techniques such as the implementation project assessment described above to improve the quality and feasibility of the implementation component of the plan, and write this work into the project scope and secure the necessary internal or external assistance to carry it out. In addition, planners should promote a holistic approach to implementation of community plans by recognizing the centrality of their role in local government. They should use

their skills and talents to enhance communication and social ties across departments and agencies to improve integration of policies across plans and support implementation measures that advance shared community goals.

## CASE STUDIES

When developing guidance on how to move effectively from planning to implementation, one size does not fit all. Different projects have different contexts, different clients, and different

resources. As a result, an implementation project assessment will take a somewhat different form in each case.

The following case studies represent three communities in which the lead author has tested the implementation project assessment methodology: a suburban municipality in a major metro area, a semirural but rapidly suburbanizing county, and an unincorporated rural community hosting a major new manufacturing facility. Each community prepared a plan and used the implementation project assess-

## Organizing for Success and Tracking Progress

There are many things that planning agencies can do to create a framework for successful project management to help implement an adopted plan.

### Budget linkages:

- Integrate plan implementation projects with the annual budget cycle, like Asheville, North Carolina, did with its 2018 [Living Asheville Comprehensive Plan](#).
- Link the comprehensive plan closely to capital investments, like Hilton Head, South Carolina, did for its [Hilton Head Island Our Plan 2020-2040 Comprehensive Plan](#). While the South Carolina Priority Investment Act requires an analysis and prioritization of funds available for public infrastructure and community facilities, Hilton Head did a particularly good job with integrating this analysis into its new comprehensive plan and establishing community goals and strategies to guide public investment.

### Resource allocation:

- Create an interdepartmental work team like the Town of Cary, North Carolina, did with the project implementation team, or "PIT" crew, that it established for its [Cary 2040 Community Plan](#).
- Establish an implementation fund like Chapel Hill, North Carolina, did for its [Chapel Hill 2020 Comprehensive Plan](#), updated in 2020.
- Pre-allocate potential matching funds to help staff respond more nimbly to grant opportunities, like the City of Greensboro, North Carolina, did to help implement its 2019 [Plan2Play Parks & Recreation Plan](#).
- Align activities throughout the agency with the new plan and place special emphasis on building community capacity to support implementation, like Rochester, New York, has done with its 2019 [Rochester 2034 Comprehensive Plan](#).

### Metrics and reporting:

- Establish strong metrics to measure plan implementation progress, like the outcome-based measures included in the Cambridge, Massachusetts, 2019 [Envision Cambridge Citywide Plan](#).
- Create a dashboard to track community progress and plan implementation, like Alexandria, Virginia's compendium of

city-wide [Performance Dashboards](#) and its 2019 [Master Plan Status of Implementation Report](#), or like Greensboro with its [Greensboro Comprehensive Plan Dashboard](#) and quarterly [Implementation Update](#) newsletter.

- Use visually engaging measures expressed in accessible terms to determine plan implementation success, like in Apex, North Carolina's 2019 [Downtown Master Plan and Parking Study](#), which includes metrics like "Salem Street is full of people—day and night" and "We've added 100 more housing units to the downtown area."
- Provide a simple, highly readable project status update, like Houston's [status of projects](#) to implement its [Resilient Houston](#) plan.
- Develop analysis tools, like the interactive [Indy Vitals](#) website developed by the Polis Center that allows viewers to track the health and sustainability of neighborhoods in Marion County, Indiana.
- Provide annual or bi-annual updates on plan progress like Austin, Texas's 2018 [Imagine Austin Annual Report](#) and its online [Imagine Austin Action Matrix](#), Rochester's [Two-Year Progress Report on Rochester 2034](#), or the City of Bainbridge Island, Washington's 2019 [Comprehensive Plan Implementation Update](#).

It can also be helpful to develop a nimble process for updating the plan, like Hamilton, Ohio, did for its 2019 [Plan Hamilton](#), which specifies which plan components can be updated by staff, the planning commission, and the city council to facilitate timely revisions.

When planning agencies use practices such as these, they are better able to maintain the energy and momentum that have often been created during the planning process and build the support for major implementation projects. A good example is the City of Memphis' [Accelerate Memphis](#) initiative, which built support to invest \$200 million in catalytic capital improvements in neighborhoods across the city based on small area plans drafted as a follow-up to the 2019 [Memphis 3.0 Comprehensive Plan](#).

In these ways, planning agencies can organize themselves to move effectively from planning to implementation and update the community on their successes.

ment, or key elements of it, as part of the process to help develop an effective and appropriate set of implementation measures.

As these case studies demonstrate, the techniques described in this *Memo* can be used by communities of any size. Regardless of the context, an implementation project assessment can be customized to meet the needs of the planning process and strengthen the plan's implementation component.

### **Mint Hill, North Carolina**

Heralded for its green character, Mint Hill is a suburban community on the southeastern edge of the rapidly growing Charlotte region. A town of about 26,000 residents abutting I-485, Mint Hill is working to preserve its small-town feel in the face of rapid development extending out from Charlotte. A consultant team comprising Merrick & Company, Nealon Planning, Green Heron Planning, and VHB worked with community stakeholders and a plan advisory committee of residents to identify key issues and themes for the [comprehensive plan](#). The consultant team then developed a list of potential implementation strategies and Green Heron Planning worked with key staff to conduct the implementation project assessment, organizing the different strategies into a detailed spreadsheet (see [Appendix](#))

and then reviewing and discussing them with the town manager and the planning director over the course of two online meetings.

Key staff have important insights to provide on the politics, feasibility, and importance of the different potential measures, and in Mint Hill their input was used to revise the spreadsheet and the corresponding implementation section of the plan. In addition, the town manager and the planning director provided input on key strategies to pursue initially following plan adoption, which were then summarized in an implementation checklist of priority projects (Table 4).

The consultant team then presented the draft implementation component of the plan to a Plan Advisory Committee (PAC) of residents and shared copies of the proposed implementation projects and the priority list with it for review and comment. The implementation section received positive feedback from PAC members, and the implementation project assessment significantly increased the comfort level of the town manager and planning director with the portfolio of proposed implementation projects and their feasibility, garnering their support in the process.

In this practitioner-driven approach using the community-informed method, community members relied on planning experts to identify the most appropriate implementation measures and then bring them to the PAC and the

**Table 4. Mint Hill Implementation Checklist – Priority Projects (Draft, 6/6/22)**

| NO.                      | NAME                                                                                             | DESCRIPTION                                                                                                                                                                                                        | LEAD STAFF                         | EST. COST  | FUNDING SOURCES                                              | NEXT STEPS                                                                                                                                                                                                                                            |
|--------------------------|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|------------|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Town Projects</b> |                                                                                                  |                                                                                                                                                                                                                    |                                    |            |                                                              |                                                                                                                                                                                                                                                       |
| TC-1B                    | <b>Establish open space strategies/requirements for new development</b>                          | Amend the UDO to adjust dimensional and site design standards as well as streetscape and open space conservation requirements to reflect patterns that contribute to green character of the town.                  | Planning Dept.                     | Staff time | N/A                                                          | <ul style="list-style-type: none"> <li>• Add to Planning Dept. work plan</li> <li>• Select staff lead</li> <li>• Scope UDO sections to revise</li> <li>• Review examples from other places</li> <li>• Develop customized approach for Town</li> </ul> |
| TC-1E                    | <b>Consider developing policies for street tree maintenance and replacement program</b>          | The Town should consider a cost-share program to assist neighborhoods with the maintenance and replacement of street trees.                                                                                        | Planning Dept., Public Works Dept. | Staff time | N/A                                                          | <ul style="list-style-type: none"> <li>• Add to Planning Dept. and Public Works Dept. work plans</li> <li>• Select staff lead</li> <li>• Identify examples from other places</li> <li>• Develop customized approach fro Town</li> </ul>               |
| PR-1C                    | <b>Establish parkland dedication or payment in lieu requirement to help implement parks plan</b> | The Town should require new residential projects to dedicate parkland at a rate based on the number of dwelling units, or make a payment in lieu of dedication to enable the Town to acquire and develop parkland. | Planning Dept., Public Works Dept. | Staff time | N/A                                                          | <ul style="list-style-type: none"> <li>• Add to Planning Dept. and Public Works Dept. work plans</li> <li>• Select Staff lead</li> <li>• Review examples from other places</li> <li>• Develop customized approach fro Town</li> </ul>                 |
| PR-1E                    | <b>Prioritize improvements to existing parks</b>                                                 | Develop prioritized list of improvements for existing parks, along with funding plan.                                                                                                                              | Public Works Dept.                 | Staff time | Parkland PIL; Town general fund; grants; agency partnerships | <ul style="list-style-type: none"> <li>• Add to Public Works Dept. work plan</li> <li>• Select staff lead</li> <li>• Conduct prioritization for review and discussion</li> <li>• Develop proposed funding plan</li> </ul>                             |
| PR-1F                    | <b>Consider investing in new parks (types and locations)</b>                                     | Identify and prioritize park system needs to serve current and projected population; develop funding plan                                                                                                          | Public Works Dept.                 | Staff time | Parkland PIL; Town general fund; grants; agency partnerships | <ul style="list-style-type: none"> <li>• Add to Public Works Dept. work plan</li> <li>• Select staff lead</li> <li>• Conduct prioritization for review and discussion</li> <li>• Develop proposed funding plan</li> </ul>                             |

community for review. Through the vetting process, the town manager and planning director were able to assist in the selection of appropriate projects by providing a clear sense of the priorities and preferences of council members and the community, as well as the resources and capabilities of the town government.

### **Johnston County, North Carolina**

A suburbanizing rural county on the urban fringe, Johnston County is located within commuting distance of the North Carolina state capital in Raleigh and major job center Research Triangle Park. From 2010 to 2020, it was the fastest growing county in North Carolina, with a 29 percent increase in population during that time. As a result, the county is undergoing a transformation from sweet potatoes to subdivisions, particularly in its northwestern quadrant, but many residents have expressed a desire to maintain the county's rural character and agricultural way of life for future generations as this change occurs.

In 2021, the County hired a consultant team comprised of Nealon Planning, Green Heron Planning, Stewart, and VHB to work with the Johnston County Planning Department to prepare an updated [comprehensive land use plan](#). The planning team worked for a year to gather public input and prepare updated goals and policies. Then it had an initial brainstorm with

a plan steering committee composed of county residents and organizational representatives. The planning team used this to help draft a proposed list of implementation strategies, which it presented back to the plan steering committee for comment, and held a community workshop to gather additional input from community stakeholders.

Some steering committee members had been anxious to discuss the various implementation strategies early in the planning process, concerned about the possibility that the final recommendations would not be sufficient to successfully address the challenges and opportunities faced by the county. As a result, the planning team dedicated time in one of the steering committee meetings to brainstorming with committee members on potential action items. This helped build their comfort with the list of strategies developed by the planning team as a follow-up.

For the community workshop, the planning team gave each participant \$600 in play money, called "Butch Bucks" after the good-natured chairman of the County Board of Commissioners. Then participants were invited to "spend" the funds on whichever projects they wanted to see the County prioritize by sticking them on a giant poster showing all the proposed implementation strategies (Figure 3). This feedback provided valuable community input on how to prioritize the implementation measures in the plan.



Figure 3. Johnston County community members vote with "Butch Bucks" to prioritize potential implementation action items (Ben Hitchings)

In this example of a stakeholder-driven approach using the steering committee method, key stakeholders provided some initial ideas for implementation that were captured through the plan steering committee process and included in a more extensive lists of projects developed by the planning team. This portfolio of actions was then presented to the community for input. Having a list of potential strategies made it easier for community stakeholders to identify what they liked and didn't like, and the technique of voting with play money gave them an engaging way to express their preferences.

### Moncure, North Carolina

Located in southeastern Chatham County, Moncure is an unincorporated rural community 30 miles west of Raleigh. The community grew up along the Seaboard Air Line Railroad in the late nineteenth century. Today it is home to a new electric vehicle manufacturing facility that is the second largest economic development project in state history. As a result, Chatham County enlisted Nealon Planning and Green Heron Planning (GHP) to work with project lead White & Smith Planning and Law Group and other consultants to prepare a small area plan with the community. The planning team conducted extensive public engagement and analysis to craft a shared vision for future land use. Then GHP worked with County staff and stakeholders to prepare a portfolio of action steps to help the County move quickly and effectively from planning to implementation.

GHP engaged the staff and stakeholders to identify an initial set of promising implementation projects and organize them under 12 themes derived from public input. Then it conducted two two-hour vetting meetings online with an implementation project review team composed of key County staff and consultants, including the county manager and assistant county manager. The resulting portfolio of proposed projects reflected the insights and information of the group and built the comfort level of the participants in the resulting draft product. In the process, the project review team identified several existing and planned County projects that could help address key community concerns, creating an opportunity to dovetail this work with existing County efforts and help the County get credit for some initiatives it was already planning. The review team also identified priority short-term projects to include in an implementation table and provided additional information on each project to help queue it up for action.

GHP then presented the implementation portfolio and table of short-term actions at a community workshop. It invited stakeholders to vote on the themes they most wanted the County to address and the short-term projects they most wanted the County to pursue (Figure 4). This process helped stakeholders connect the dots between the issues they had identified and the steps the County was proposing to address these concerns, building community confidence that the planning effort would bring positive action from the County.

The result was [Plan Moncure](#), adopted by the Chatham County Board of Commissioners in October 2023. In this exam-

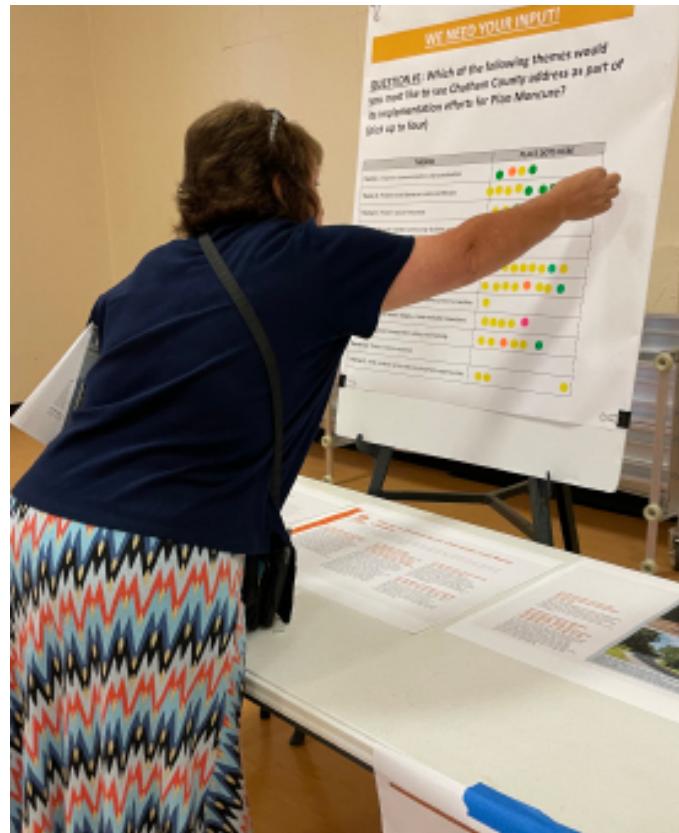


Figure 4. Moncure community members vote on the plan themes and action steps they most want the County to address (Ben Hitchings)

ple of the practitioner-driven approach using the community-informed method, the implementation project assessment process helped the County develop a meaningful and workable implementation strategy and contributed to the positive support that the plan received during the board adoption process. It also gave County staff a useful tool—the implementation table—to manage the portfolio of short-term projects moving forward.

### CONCLUSION

If done well, a planning process can engage community stakeholders and build their commitment to the plan. But if the process stumbles from planning to implementation, the lack of follow-through can dissipate this positive energy and leave participants tired and potentially cynical about the ability of government to get things done.

Conducting an implementation project assessment can help prevent this outcome. By enabling the planning team and organizational staff to vet potential implementation measures for their alignment, feasibility, and impact, it can assist the planning team in developing a portfolio of implementation projects that is both impactful and doable. Engaging community stakeholders to review and provide their feedback on this project portfolio can help them understand what the local government is proposing and help the planning team

prioritize short-term projects for immediate implementation following plan adoption. This approach can help an organization deliver tangible improvements and demonstrate the value of planning to implement a shared community vision, building support for the next community planning initiative. And you'll have a good answer if you are ever asked, "What became of that plan?"

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**APPENDIX:**  
**MINT HILL COMPREHENSIVE PLAN**  
**IMPLEMENTATION PROJECT VETTING SHEET, p. 1**

*Prepared by Green Heron Planning, LLC*  
(Draft, 4/21/22)

| PROJECT NAME                                                                                                                                           | 1. ALIGNMENT | 2. FEASIBILITY |                   |               |                   |                 |             | Overall Feasibility (H, M, L) | 3. IMPACT (H, M, L) | PRIORITY (H, M, L) |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------|-------------------|---------------|-------------------|-----------------|-------------|-------------------------------|---------------------|--------------------|--|--|
|                                                                                                                                                        |              | Plan Goals     | Political Support | Legal (Staff) | Technical (Staff) | Capacity (Town) | Financial ? | Partners ?                    | Consultant ?        |                    |  |  |
| <b>TOWN CHARACTER</b>                                                                                                                                  |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| <b>Maintain and Expand Green Character of Mint Hill as Part of the Development Pattern</b>                                                             |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| Conduct open space and landscape corridors analysis and prioritization                                                                                 | ✓            |                |                   | ✓             | ✓                 | ✓               |             |                               | Grad Students?      | M                  |  |  |
| Establish open space strategies/requirements for new development                                                                                       | ✓            |                |                   | ✓             | ✓                 | ✓               |             |                               |                     | M                  |  |  |
| Review tree protection requirements                                                                                                                    | ✓            |                |                   | ✓             | ✓                 | ✓               |             |                               |                     | L                  |  |  |
| Limit encroachment of new development into delineated open space                                                                                       | ✓            |                |                   | ✓             | ✓                 | ✓               |             |                               |                     | M                  |  |  |
| Consider developing policies for street tree maintenance and replacement program                                                                       | ✓            | ✓              |                   | ✓             | ✓                 | ✓               | ✓           | ✓                             |                     | H                  |  |  |
| <b>Celebrate the History of Mint Hill</b>                                                                                                              |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| Look for opportunities to celebrate history of Mint Hill for example with events, programming, public art, and interpretative displays                 | ✓            |                |                   | ✓             |                   |                 |             | Y                             |                     | M                  |  |  |
| • Recognize key sites and structures                                                                                                                   | ✓            |                |                   | ✓             | ✓                 |                 |             |                               | Y                   | L                  |  |  |
| • Consider a museum and/or interpretive displays in downtown                                                                                           | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | L                  |  |  |
| • Consider partnerships with Historic Village for walking tours and other activities                                                                   | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | L                  |  |  |
| <b>PARKS, RECREATION, &amp; GREENWAYS</b>                                                                                                              |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| <b>Improve Parks &amp; Recreation System</b>                                                                                                           |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| Prepare parks and recreation level-of-service analysis to determine facility needs based on National Recreation and Parks Association (NRPA) standards | ✓            |                |                   | ✓             |                   |                 |             |                               | ✓                   | H                  |  |  |
| Evaluate feasibility of community athletic complex with aquatics facility                                                                              | ✓            |                |                   | ✓             |                   |                 |             |                               | ✓                   | M                  |  |  |
| Establish a parkland dedication or payment in lieu requirement to help implement new plan                                                              | ✓            |                |                   | ✓             | ✓                 | ✓               | ✓           |                               |                     | L-M                |  |  |
| Explore a schools-parks colocation initiative with the Charlotte-Mecklenburg School System                                                             | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | L                  |  |  |
| Prioritize improvements to existing parks                                                                                                              | ✓            |                |                   | ✓             | ✓                 |                 |             |                               |                     | M                  |  |  |
| Consider investing in new parks (types and locations)                                                                                                  | ✓            |                |                   | ✓             | ✓                 |                 |             |                               |                     | M                  |  |  |
| Evaluate future staff resources needed to manage implementation of new system improvements and to maintain                                             | ✓            |                |                   | ✓             | ✓                 |                 |             |                               |                     | M                  |  |  |
| Evaluate funding strategies (partnering w/Meck County P&R; installment purchase; Town bond referendum)                                                 | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | H                  |  |  |
| <b>Connect Residential Neighborhoods to Destinations</b>                                                                                               |              |                |                   |               |                   |                 |             |                               |                     |                    |  |  |
| Consider requiring greenway land dedication with new development; consider incentives for construction                                                 | ✓            |                |                   | ✓             | ✓                 | ✓               | ✓           |                               |                     | M                  |  |  |
| • Consider developing strategy and policies for how to protect and develop greenways (partnering w/Meck Coun                                           | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | M                  |  |  |
| Allocate and secure funding to create and expand trail network (roll into sidewalks)                                                                   | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | M                  |  |  |
| Partner with Meck County and others to acquire land for key greenway connections                                                                       | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | L-M                |  |  |
| Continue to maintain adequate buffers to protect streams and floodplains                                                                               | ✓            |                |                   | ✓             | ✓                 |                 |             |                               |                     | L                  |  |  |
| Leverage partnerships to define system segments along roads and utility easements                                                                      | ✓            |                |                   | ✓             | ✓                 |                 |             | Y                             |                     | M                  |  |  |