2006

Planning 1-2-3

A step-by-step workbook to writing a comprehensive plan in Illinois

Campaign for Sensible Growth

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In Memory of Sam Santell

Co-Chair, Planning 1-2-3

Technical Advisory Committee

Champion of Sensible Growth

(1954 – 2006)

TABLE OF CONTENTS

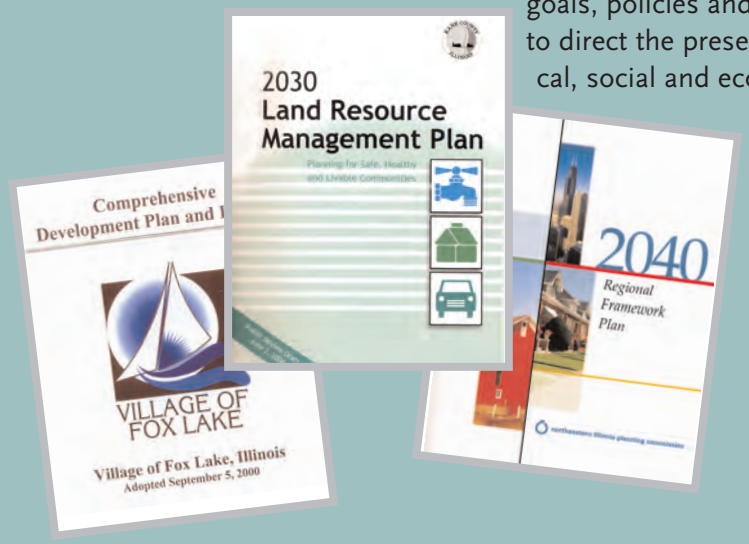
Introduction		*i*
Part 1.	Creating a Comprehensive Plan	1
Part 2.	Land Use Element	9
Part 3.	Natural Resources Element	17
Part 4.	Transportation Element	23
Part 5.	Economic Development Element	35
Part 6.	Housing Element	45

APPENDICES

A.	Reference List	55
B.	Web Resources	58
C.	Legislation	59
D.	How to Find Consultants	75
E.	What to Include in a Request for Proposal	76
F.	Glossary	79

INTRODUCTION

This workbook is designed as a step-by-step guide for Illinois municipal officials to prepare a local comprehensive plan for their communities. The term "comprehensive plan" means the vision of what the community wants to become and the steps needed to meet that goal. It is a statement by a local government that sets forth – in text, maps, illustrations and tables – the goals, policies and guidelines intended to direct the present and future physical, social and economic development that occurs within the jurisdiction.



The workbook includes examples of plans and planning policies from Illinois communities, as well as checklists to help in getting started. These should aid local governments as they formulate their own comprehensive plans.

A comprehensive plan has several purposes, but primarily it allows the community to create its own vision: an image in words that describes what it wants to be and how it wants to look at some point in the future. The public process to create a comprehensive plan is a visible means of involving the public in the future of its community. A comprehensive plan also sets up the framework for future action, ranging from zoning and subdivision regulations to decisions on development and redevelopment.

THIS WORKBOOK IS DIVIDED INTO SIX PARTS

- **Part 1: Creating a Comprehensive Plan** introduces the local comprehensive plan and its elements in the context of Illinois statutes. It discusses the plan's purposes and how to get started on the preparation of a plan, including involving residents in plan-making.
- **Part 2:** describes the **Land Use Element**, a fundamental part of the plan. The land use element shows the general distribution, location and characteristics of current and future land uses, typically for a 10 to 20-year period.
- **Part 3:** explains the **Natural Resources Element**, which focuses on environmentally critical and sensitive areas such as wetlands, waterways and water bodies, groundwater recharge areas, and various habitats including woodlands and savannas.
- **Part 4:** describes the **Transportation Element**. It covers traffic circulation, transportation corridors, public transportation, thoroughfares, bicycling and pedestrian facilities, ports, truck routes, airports, and railways, as needed.
- **Part 5:** examines the **Economic Development Element**, which describes the strategies a local government, working on its own and with others, will engage in to promote economic growth and retain existing jobs.
- **Part 6:** addresses the **Housing Element**, which documents the present and future needs for shelter within a local government's jurisdiction, including affordable and special needs housing.

Creating a Comprehensive Plan

WHAT IS A COMPREHENSIVE PLAN?

The **local comprehensive plan** is the vision of what the community wants to become and the steps needed to meet that goal.

Comprehensive plans are composed of a series of separate, but interrelated, **core elements** that address specific topics defined in the Illinois Local Planning Technical Assistance Act (Public Act 92-0768, Sec. 5). The common elements most likely to be addressed in any planning effort are covered in detail in this workbook:

- **Land use**
- **Natural resources**
- **Transportation**
- **Economic development**
- **Housing**

In addition, a community may wish to add the following elements:

- **Community facilities,** including schools, parks, health care, and public works;
- **Historic preservation,** including policies and direction regarding historic and cultural preservation of both individual sites and neighborhoods;
- **Urban design,** including direction of the standards the community is looking for in both public projects and private development;
- **Agriculture and forestry,** including the community's intention to either preserve, enhance or manage the transition of agriculture to other uses;
- **Technology,** including digital communications infrastructure and access; and
- **Subareas,** specific plans for central business districts, transportation corridors, neighborhoods, etc.

The elements of the plan are interrelated in that they share **common assumptions** about population and economic growth, the geographic area to which the plan applies, and the time frame, typically from 10 to 20 years. The elements must reinforce and not conflict with each other. For example, a comprehensive plan whose economic development element anticipates substantial employment growth must address housing needs for the new employees. If that is not done, the need for new housing will impact nearby communities and traffic congestion will increase.

All comprehensive plans include a set of core components

- A statement of authority to prepare and adopt the plan.
- Background data and analysis, including area history, a description of existing social, economic and physical (natural and man-made) conditions and trends, and economic and demographic projections.
- Documentation of stakeholders' interests (e.g., interests of residents, public officials, the business community, developers) and involvement in the process.
- A vision statement or statement of desired goals and objectives.
- Evaluation of the selected plan and design alternatives.
- A future plan map or maps depicting various components, including land use, transportation, community facilities, and housing areas.
- An implementation framework or schedule that describes specific measures to carry out the plan, their costs (if known), and the time frame for execution.

WHAT ARE THE PURPOSES OF A COMPREHENSIVE PLAN?

Present the big picture and state the vision.

A plan gives community members an opportunity to clarify their ideas about the kind of community they are creating through their many specific decisions. Through information gathering, analysis, and evaluation of alternatives, the plan ensures that public actions are based on factual analysis. The preparation of a comprehensive plan is an opportunity to create a vision for the community, an overall image in words that describes what the local government wants to be and how it wants to look at some point in the future. The vision serves as the unifying concept for the plan.

Involve the citizenry.

In many communities, the preparation of a comprehensive plan is the local government's most visible means of involving the public. Workshops, questionnaires, interviews, interactive Web sites, planning exercises, and public hearings are all ways to gauge public sentiment regarding where the community should be going and what it should look like.

Guide regulation and public investment.

A comprehensive plan, through the adoption of goals and policies, establishes a framework for the administration of zoning and subdivision regulations and the location, financing and sequencing of public capital investment. When individual proposals for developments are reviewed by the local government for zoning changes or development applications such as for subdivisions, the comprehensive plan provides guidance for location, use and type of roads, and similar improvements. Similarly, when a community is reviewing its annual capital budget or long-term capital improvement program, the comprehensive plan aids in setting priorities.

Michael Davidson, Campaign for Sensible Growth

A public meeting in DeKalb County, Ill., shows that good planning is a democratic process. Public meetings about a comprehensive plan give citizens a forum to help guide the plan and provide opportunity for feedback and concerns.

Give direction.

Since it indicates how a local government will act over time regarding development and redevelopment, the comprehensive plan provides direction to the private sector that will shape private initiatives such as development proposals.

Protect the community.

If, unfortunately, the jurisdiction finds itself in court over land use issues, having a comprehensive plan that explains the community's goals and future plans is an excellent defense. Similarly, if a municipality's comprehensive plan is outdated and has not been updated recently, this can hurt a community if its land use decisions are challenged.

HOW DOES ILLINOIS DEFINE A COMPREHENSIVE PLAN?

Several statutes contain general descriptions of what a comprehensive plan is and what it should contain, each with different yet complementary emphases. The full text of these statutes appears in Appendix C. Local governments should consult with their attorneys regarding how to use these statutes in individual situations.

Under the ***Illinois Municipal Code*** (65 ILCS 5/11-12-5(1)), a city or village plan commission is charged with preparing and recommending "a comprehensive plan for the present and future development or redevelopment of the municipality. Such a plan may be adopted as a whole or in separate geographical or functional parts, each of which, when adopted, shall be the official comprehensive plan, or part thereof, of that municipality. This plan may include reasonable requirements with reference to streets, alleys, public grounds, and other improvements hereinafter specified." The comprehensive plan covers the entire incorporated area of the municipality, and can extend to land up to 1.5 miles beyond the corporate limits of the municipality, as long as that land is not incorporated by another municipality. If this unincorporated territory is within 1.5 miles of two or more corporate authorities, the communities should adopt a boundary agreement to decide which municipality has planning jurisdiction over that territory (65 ILCS 5/11-12-9).

The Local Planning Technical Assistance Act (Public Act 92-0768, Sec. 5) defines a comprehensive plan as "a regional plan adopted under Section 5-14001 of the Counties Code." It describes the comprehensive plan as containing a series of elements, including the plan segments covered in this manual. The state also may provide funding for a Local Planning Fund that was created by the act. Communities with comprehensive plans that meet the act's requirements may be eligible for preference in certain discretionary state funding.

Two other acts describe plans with similar purposes. ***The Local Land Resource Management Planning Act*** (50 ILCS 805/3.B) depicts a land resource management plan as "a map of existing and generalized proposed land use and a policy statement in the form of words, numbers, illustrations, or other symbols of communication adopted by the municipal and county governing bodies," which "may interrelate functional, visual and natural systems and activities relating to the use of land. It shall include but not be limited to sewer and water systems, energy distribution systems, recreational facilities, public safety facilities, and their relationship to natural resources, air, water, and land quality management or conservation programs within its jurisdiction." The act is often used by counties developing comprehensive plans with their municipalities.

The Local Legacy Act (Public Act 93-0328, Sec. 10) includes a definition of a resource protection plan, which, while not exactly the same as a comprehensive plan, is described as "an integrated document that includes goals, policies, strategies, and procedures for preserving key farmland, natural areas, and cultural resources identified in a countywide inventory." Under this act, the state government can provide grants to counties and municipalities to jointly prepare inventories and complete such plans. The description of this plan covers the same topics included in a comprehensive plan's natural resources element, addressed in Part 2.

WHAT IS THE RELATIONSHIP TO REGIONAL OR COUNTY PLANS?

In preparing a comprehensive plan, it is critical to look at the next one or two levels of geographic area to understand the economic and demographic influences on the local government. If a region or a sector of a region can expect population growth due, for example, to major transportation improvements, then that growth will affect local governments within the region.

Most areas of Illinois have regional planning agencies of some type (such as the Northeastern Illinois Planning Commission and Chicago Area Transportation Study in northeastern Illinois – now merged as the Chicago Metropolitan Agency for Planning – or the Tri-County Regional Planning Commission in the Peoria area); most of these focus on federally mandated transportation planning. In addition, many counties have county planning commissions, whose plans may have a similar impact to those of multi-jurisdictional regional plans.

Regional Plans in the Chicago Metropolitan Area

In the Chicago area, there have been two regional planning agencies: the Northeastern Illinois Planning Commission (NIPC), responsible for land use and environmental planning; and the Chicago Area Transportation Study (CATS), the designated metropolitan planning organization (MPO) for transportation planning. In the past, these two agencies have separately created a regional land use plan and a regional transportation plan. However, in 2005, a new state law called for the consolidation of the functions of these two agencies into the Regional Planning Board, now known as the Chicago Metropolitan Agency for Planning (CMAP).

The most recent NIPC regional land use plan is called the 2040 Regional Framework Plan (2005), and it illustrates in words and maps a hierarchy of centers, transportation corridors, and open space/green areas, and sets forth a series of specific policies and implementation measures to carry out the region's vision.

The centers in the plan are compact, mixed-use, livable, economically vibrant places interconnected by multiple means of transportation. Various types of centers, which are hubs of mixed residential and commercial activities where people can live and work, are described in the plan. Corridors are transportation and activity links between centers, especially global and metropolitan centers, and reinforce specific capital projects contained in the CATS *2030 Regional Transportation Plan* (2003).

The Regional Framework Plan also designates a series of green areas, including agricultural farmland, protected open space, land desirable for acquisition or other forms of protection, and water resource areas (streams, lakes, flood plains, and wetlands).

THE 2040 REGIONAL FRAMEWORK PLAN

The 2040 Regional Framework Plan provides a vision for meeting land use challenges in the most efficient, coordinated and sustainable manner. The 2040 Regional Framework Map illustrates this vision for growth that highlights centers, corridors, and green areas. (*To access the 2040 Regional Framework Plan, see www.nipc.org/2040.*)

Source: NIPC, 2005

CENTERS

Centers come in different sizes, from metropolitan centers to town centers. They are generally defined as compact, mixed-use, livable, inclusive, and economically vibrant places interconnected by multiple modes of transportation.

CORRIDORS

The 2040 Plan defines a system of corridors and supportive land uses meant to connect the region's centers and improve residents' quality of life by making it easier to get around our communities.

GREEN AREAS

From small parks and streams to large prairies and lakes, green areas are valuable biodiverse resources that include agricultural land, open space, water resources, and greenways. They can connect communities and provide for the health and well-being of citizens.

HOW DOES A COMMUNITY GET STARTED ON A COMPREHENSIVE PLAN?

In Illinois, the local plan commission (or planning/zoning commission) oversees the process of preparing the comprehensive plan, after being charged to do so by the village board or city council. After the draft plan is completed, the commission forwards it to the board or council for adoption. Sometimes, such as for watershed or special area plans, an advisory group of stakeholders oversees the plan's creation.

Between initiation and adoption, many steps must occur. These include:

1 Decide who is going to write the plan.

In larger communities, the planning staff may have the professional experience and resources, including mapping and geographic information systems (GIS), to put together a plan. It may also make sense to invest in hiring staff to lead the planning efforts, rather than hiring an outside consultant. Alternatively, the planning department staff may be small, overworked or inexperienced, or there may be no planning department at all. In such cases, communities should consider retaining a private planning consultant or contracting with a public agency such as a regional planning commission, or a nonprofit organization. (*For more information on finding consultants and writing a Request for Qualifications (RFQ), see appendices D and E.*) To begin the process, the community should develop a scope of work and a request for qualifications, interview the organizations or individuals that respond, and select those that best suit its needs.

2 Establish a schedule and budget for completing the plan.

The planning process must have a beginning, middle and end, and result in a document that is ready to be adopted. If the process goes too long, it will wear out and lose the attention of citizens and officials, as well as run up costs. A schedule advises everyone when drafts of the plan are due for review and for adoption. A budget allows the village board, city council, or county board to set aside money for the project; lets the local government staff know how much time can be charged to the plan; and determines how much can be spent on consultants. It also is important to budget for the cost of production, graphic design, and layout. Many communities today are reducing the cost of their comprehensive plans by making them available online and/or on a CD-ROM, instead of printing them. Regardless of the final format, a community should make sure its plan is readily available during both the public involvement process and once the plan is adopted.

3 Decide how residents are to be involved.

Early involvement by the public is crucial to ensure understanding of the planning process, facilitate the development of new ideas and consideration of alternatives, and, ultimately, build support for implementation.

A common technique used to involve residents is a **visioning process**, intended to allow a community to better understand the values and concerns of its residents and use them as a basis for planning. Visioning often includes photo preferences and discussions. It highlights the trends and forces that are affecting the community. Under the Local Planning Technical Assistance Act, the visioning process is intended to result in a separate "issues and opportunities" section of a plan that documents the steps, analysis and outcomes of procedures.

4 Agree on issues to be addressed.

Comprehensive plans typically have two focuses: (1) broad issues such as those relating to the physical composition of the community, its relation to the region, and management of growth and conservation; and (2) specific issues, often stated in terms of problems, such as development in certain neighborhoods, traffic congestion on specific streets, a lack of affordable housing, or changes in the central business district. Defining and refining the issues will come from the citizen involvement process as well as debate among the plan commission and village or county board or city council.

5 Collect and analyze data, as appropriate.

Data to be collected will depend on the particular plan section involved and are described for individual elements (such as transportation or housing). Data can be in the form of historical or descriptive accounts, statistics in tabular form, graphs and charts, and, increasingly, interpretative mapping through GIS.

6 Agree on goals, policies and guidelines that pertain to the vision.

A *goal* is a statement of a desired end. Sometimes the term "objective" is used in place of a "goal." A *policy* is a general rule for action on a specific issue, derived from more general goals. A *guideline* provides more specific direction on how the policies may be implemented. Goals, policies and guidelines are usually developed gradually, as the concerns of the comprehensive plan crystallize and are refined. An objective is a measurable outcome toward meeting the goal, preferably with time and responsibility identified.

Why should a comprehensive plan be kept up to date?

Local governments use a comprehensive plan to make day-to-day decisions in a long-range context. However, communities are dynamic entities. Populations shift and become more racially or ethnically diverse, people age, jobs are created or lost, public works are constructed, land is developed and redeveloped, and housing preferences change.

Sometimes the pace of change can overwhelm a community. A comprehensive plan that is out of date and fails to account for these changes essentially provides the community with a backward glance rather than a forward view, and is a poor mechanism for directing growth.

Keeping the plan current and monitoring progress on implementation are critical. It is a good idea to visit the comprehensive plan on an annual basis, for purposes of monitoring progress; and conduct minor updates every five years, with a full revision once a decade, when new census data becomes available.

How can residents become involved in comprehensive planning?

Public involvement can occur in a variety of ways:

- ☐ **PUBLIC HEARINGS**
  These are meetings that are required to be held before a plan can be adopted. They require public notice. At such hearings, residents offer their opinions on the proposed plan.

- ☐ **WORKSHOPS**
  These are informal meetings to discuss sections of a plan. Resident comments should be included in the talks among plan commission members and others involved in creating the plan.

- ☐ **CHARRETTES**
  These are design workshops where participants quickly develop and evaluate alternative plans.

- ☐ **WEB SITES**
  Many local governments use the Internet to provide information about the planning process, schedules, and drafts of planning documents, as well as allow the public to comment by e-mail.

- ☐ **SURVEY RESEARCH**
  Whether by mail, telephone or the Internet, survey research gauges public reaction to various issues considered in the planning process.

- ☐ **INTERVIEWS**
  These can be done either one on one or in small focus groups, and are especially appropriate when highly detailed information is needed.

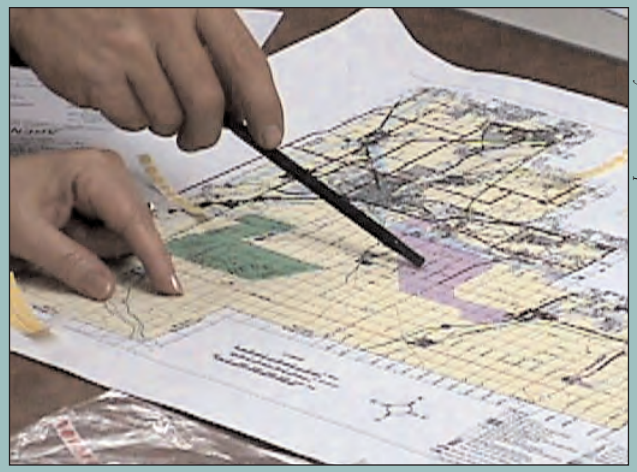
- ☐ **FLYERS OR INSERTS IN LOCAL NEWSPAPERS, NEWSLETTERS**
  These are vehicles for providing communication to a wide audience of residents.

- ☐ **PROFESSIONAL FACILITATION**
  This is an excellent tool to help large groups define issues and reach agreement. Since facilitators are neutral regarding the issues, their function is to ensure that all points of view are heard and considered, and that no one point of view or person dominates. They are particularly valuable when issues surrounding the comprehensive plan are controversial.

- ☐ **SMALL GROUP MEETINGS**
  Conducted in neighborhoods or focus groups, these are especially appropriate when detailed, area-specific information about planning issues is desired.

- ☐ **ADVISORY TASK FORCE**
  A legislative body or planning commission may create an advisory task force to broaden the scope of representation and knowledge base of the commission, and receive advice on specific parts of the plan. Advisory task forces also are helpful when the planning commission is occupied with current planning issues.

- ☐ **RESIDENT PARTICIPATION COORDINATOR**
  The coordinator manages the citizen involvement process, serving as a conduit between those preparing the plan and other citizens.



Will County Land Use Department

Will County, Ill., conducted an extensive process of citizen involvement in the preparation of its Land Resources Management Plan, adopted in 2002. Techniques varied, but included a series of meetings – from a kick-off meeting and issue identification sessions with various Will County boards and commissions, to six public community issue workshops, and special purpose public meetings on such topics as open space preservation and rural protection. Special citizen committees were organized by geographic area to identify issues and opportunities, and local municipalities were kept abreast through the network of professional municipal planners and the Will County Governmental League. Throughout the process, communication was maintained with numerous groups involved in various aspects of county growth and development. The full plan is available at: www.willcountyillinois.com.

The Land Use Element

WHAT IS THE LAND USE ELEMENT?

The land use element is the fundamental component of a comprehensive plan, and the one upon which all other sections are built. The land use element shows the general distribution, location and characteristics of current and future land uses, typically for a 10 to 20-year period.

The term "**land use**" means what activity or development is occurring on the land. The land use element consists of text, goals, policies, guidelines, and plan maps of existing and future land uses. It is based on a variety of studies, such as analysis of population, economic activity, natural resources, and inventories of existing land uses. Plan maps of future land uses should refer to proposals contained in regional plans in an attempt to avoid problems and take into account neighbors' comprehensive plans.

It is important that the land use element reflects the outcomes of the visioning process, rather than simply identifying intended uses of specific land parcels. The visioning process asks participants to imagine what the community should be like in the future. Is it a hamlet, a small village, an urban place, or a regional center? Is it built around a central business district? Are there major commercial corridors or employment areas? Will the population be different from what it is today? Where will residents work, shop and play? By putting into words and pictures the character and scale of the desired community, the participants establish a basis for the land use plan that is to follow.

The future land use allocations on the plan map should be based on local input and public participation, as well as be supported by land use projections that are either linked to population and economic forecasts made in the context of the surrounding region or, preferably, tied to assumptions contained in regional plans. The land use element could contain a description of various alternative land use designs that were considered as part of the plan's preparation.

Depending on the type of community, land use elements will emphasize different aspects:

In rural communities
The mix of land uses is sparse because most of the land is used for farming; therefore the land use segment may be relatively straightforward.

In developing communities
The emphasis may be on ensuring a balance of land uses so that, for example, residential development is matched with retail and industrial land use to provide tax revenue and supporting services in the early years of the community's growth.

In developed communities
The land use element may stress preserving the character of existing residential areas, and promoting infill and redevelopment of key areas.

In big cities
The land use segments may be more focused on commercial and industrial districts or transit stops, or areas to acquire as open space.

Some modern plans are attempting to document in greater detail the physical character of the community to provide support for what are called "form-based" zoning codes. These codes are more concerned with building heights, building volumes, setbacks, lots, and parking locations and less concerned with the actual use of the building. The intent of this approach is to describe what is desired rather than what is prohibited. In some cases, this emphasis results in the incorporation of urban design standards into the land use element. *(For more information, visit www.formbasedcodes.org.)*

WHAT ARE THE PURPOSES OF THE LAND USE ELEMENT?

The land use element is intended to guide the use of public and private land in a community. It is later translated into land use and subdivision regulations, and proposals for capital improvements.

A checklist for getting started with a land use element

The following tools will assist in preparing a land use element:

- ☐ Current base map of the community extending to the areas likely to be served during the planning period (which should be available in electronic form). In Illinois, a community can plan up to 1.5 miles out from its incorporated borders.
- ☐ Recent aerial photographs of the community
- ☐ Maps of areas within the local jurisdiction served by public water, sewer, and other utilities
- ☐ Current regional and county plans for the area and neighboring municipal plans
- ☐ Relevant annexation and boundary agreements that govern future annexations by adjoining local governments[1]
- ☐ Zoning and subdivision codes and zoning maps
- ☐ In narrative, tabular, and mapped form, inventory and analysis of the amount, type, intensity, and net density of existing land uses
- ☐ Previous comprehensive plan(s) for the community and any special studies or plans, including neighborhood or central business district or utility plans
- ☐ Plans from the Ill. Dept. of Transportation (IDOT) and regional transportation agencies or service providers
- ☐ Analysis of population and its distribution by age, household size, education level, income, employment, and other appropriate characteristics from the U.S. Census and other sources
- ☐ Analysis of the amount, type, location, and distribution of commerce and industry, and the location of major employment sites
- ☐ Projections of population and economic activity, in the region, in five-year increments (available from regional planning agencies or developed by the local government or its consultant)
- ☐ Maps and analysis of natural resources that have significant constraints on development, or are preserved through conservation easements or public ownership. This includes geology, soils, vegetative cover, water bodies, shorelines, agricultural land, and land areas that are subject to natural hazards such as flooding or unstable soils and steep slopes (more than 25 percent).
- ☐ Identification of critical natural areas, often expressed as a natural areas inventory (waterways, wetlands, flood maps, and critical habitats)
- ☐ Areas or specific buildings or sites of local architectural, scenic, historical, cultural, or archaeological interest
- ☐ Generalized map showing building forms and patterns of structures (can be derived from aerial photography and surveys)
- ☐ Identification of areas needing redevelopment or having environmentally contaminated land

[1] *In September 2005, the Illinois Supreme Court ruled that if property is subject to a proper annexation agreement (even if it has not yet been annexed), zoning and building jurisdiction rests with the municipality that is party to the agreement.*

STEPS IN THE PREPARATION OF THE LAND USE ELEMENT

1 Determine goals.

State the vision for land use in the municipality based on the results of the public participation process.

2 Collect and analyze information on the natural environment and land use.

The land use section begins with an assessment of the natural environment. *(See Part 3 for more details.)*

The comprehensive planning process needs to identify and evaluate the state of natural resources. Information that should be inventoried and mapped includes:

- Soils, geography and topography;
- Watersheds, streams, water bodies, floodplains, and wetlands;
- Aquifer recharge areas and delineated wellhead areas;
- Vegetation (forest cover, croplands, pastures, prairies, etc.); and
- Sensitive areas or critical habitats.

It is also necessary to map and summarize existing land use as part of the inventory. There are various classification guides on how to do this. Land use categories can include:

- Residential uses (single-family homes, townhouses, garden apartments, high-rise apartments);
- Retail uses;
- Industrial uses;
- Offices;
- Railroads;
- Agriculture; and
- Vacant land.

Many professionals use the American Planning Association's (APA) Land-Based Classification System (LBCS) for more detailed breakdowns that can be contained in geographic information systems. *Visit APA's Web site, www.planning.org/lbcs.*

This data collection step should focus on undeveloped land, whether it is subject to development constraints, and whether it is or can be served by public facilities.

This land, as well as land that may have potential for redevelopment, is where the plan will allocate future development.

Even in built-out communities, land use changes over time. Vacant land that is available may be in the form of lots connected to existing residences or businesses. When the value of the lot greatly exceeds the value of the structure on it, teardowns may occur, especially in communities without teardown policies.

3 Map current projects.

In order for the land use section to reflect the reality of what is planned, by both the public and private sectors, all land development projects should be mapped. This includes those that are designed and approved, committed, or sanctioned but not yet built. This provides a picture of where development is or will be taking place.

4 Develop policies and requirements for particular land use categories and types of lands.

These requirements will help guide what uses may be located where. For example, manufacturing facilities tend to be located on sites that are relatively flat (1 to 3 percent slope), while high-rise apartment complexes can be sited on flat or relatively steep slopes, as long as the ground is stable. In addition, such policies may address environmentally sensitive lands, for example, how far from a wetland development may be located.

5 Project land uses.

As a benchmark, land uses can be projected using ratios developed from the land use survey itself, with the assumption that the overall rate at which vacant land is converted to developed land will not change over time. Alternately, projections can be made using different sets of assumptions. For example, land use projections can be made using different levels of population and employment growth or with alternate assumptions about ratios. The output of these projections will be allocated to vacant and redevelopable (infill) land in the next step.

Locational policies from local comprehensive plans

From the *Village of Lockport, Ill., Comprehensive Plan* (1997):

"Every neighborhood must have a core or community focus. There must be a core that contains commercial, residential and civic buildings, a green or commons, and that provides a focal point for a neighborhood. The size of the core is dependent on the number of homes. The core should be the central point for transit. The core must front onto a street, or streets, within the primary movement network."

Canal Corridor Association

Historic downtown Lockport in Will County, Ill.

From the *Village of Antioch, Ill., Comprehensive Plan* (1991):

"Industrial development should occur west of Deep Lake Road, on sites planned and zoned appropriately, and served with Village of Antioch water and sewer. [N]on-polluting industrial and heavy commercial land uses [should be directed] to designated areas along the Wisconsin Central Railroad. [L]ight industrial development [is to be promoted] in a campus-like setting, providing for landscaped setbacks and buffer yards, perimeter screening, open space, pedestrian linkages, support commercial retail facilities, and screening of all parking and loading."

"The Village shall encourage the preservation of agricultural uses where parcels of a quarter-quarter section or larger consist of at least 80 percent prime agricultural land. Prime agricultural land is defined by Class I and Class II soils according to the U.S. Department of Agriculture Soil Conservation Service."

Projecting land use: A simple example

The table below shows two simple land use projections. In the first, population increases from 25,000 in 2000, to 45,000 in 2020. The projection assumes medium density residential land use (eight dwelling units per net acre on the average) will consume about 20 percent of future residential growth and the average household size will be 2.2 persons. Thus, there will be a need for an additional 227 acres of medium density residential land use.

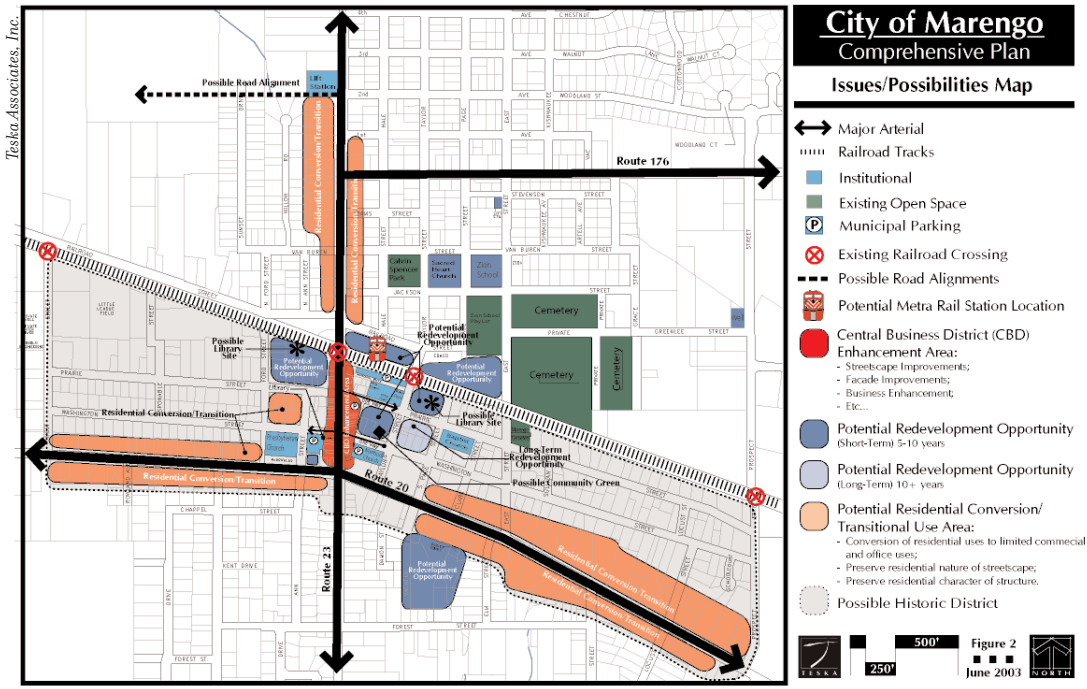
In the case of industrial land use, there are 700 people working in industrial jobs in 2000, and employment in this sector is expected to rise to 1,500 by 2020. If there are assumed to be 20 industrial employees per net acre of industrial land, the amount of industrial land required by 2020 will be an additional 40 acres.

	2000 (BASE YEAR)	2005	2010	2015	2020	CHANGE
Population	25,000	30,000	35,000	40,000	45,000	20,000
Medium density residential land use *(acres)*	284	341	398	455	511	227
Industrial employment	700	900	1,100	1,300	1,500	800
Industrial land use *(acres)*	35	45	55	65	75	40

Land use projections typically are calculated for the full range of uses, and then are allocated to the plan map under a series of alternative land use designs or scenarios.

6 Prepare sketch plans and evaluate them.

A sketch plan is a quickly made, preliminary "map" that represents the proposed graphic representation of the location of land uses, open space, and public facilities. It is used to test whether proposed uses are compatible, realistic and reflective of the community's goals. This plan, which is a trial allocation of land uses, will take into account the existence of environmentally sensitive land, built up or committed areas, and transportation facilities. The sketch plan is intended to rapidly test whether the assumptions about the projected amount of land use will work within the constraints imposed by available vacant and redevelopable land and in relation to transportation facilities.



The comprehensive plan for the City of Marengo in McHenry County, Ill., includes this sketch plan that highlights future land use and transportation options for revitalization and redevelopment in the city's downtown area.

Each sketch plan should be evaluated against a checklist or set of criteria developed from the community goals and policies.

The following can help evaluate how appropriate a sketch plan is for the community:

1. Is there enough vacant land to accommodate the desired housing, commercial, retail and industrial land uses?
2. Is there enough vacant land to accommodate the public facilities necessary to serve the proposed land uses?
3. Is there enough open space to meet the recreation needs of the community?
4. Are there any conflicts between proposed land uses?
5. Where are the historical structures and/or natural features that need to be protected?
6. Does the plan reflect the goals and policies set during the public participation process?

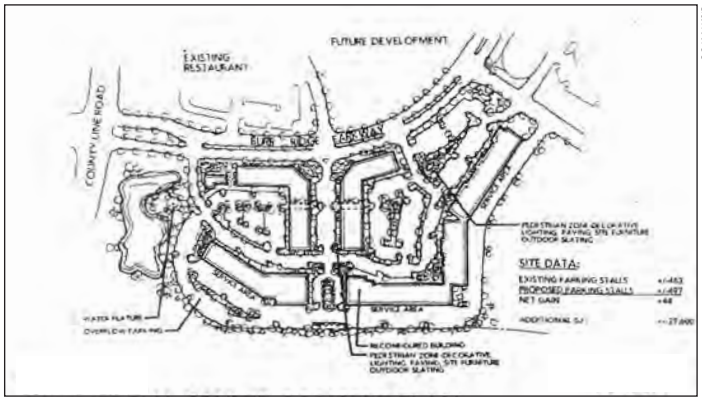
Sketch plans also can be evaluated using fiscal impact analysis, which allows a determination of which land use combinations provide positive streams of revenues against cost.

7 Select the best alternative and refine.

By trial and error, an alternative or combination of alternatives is selected that best satisfies the development criteria and meets the goals and vision of the community. It is the basis for the land use element's more formal future land use plan map, which is integrated with the natural resources and transportation elements, and includes relevant community facilities, housing, and a unified physical design for the community. A narrative should be developed that describes the selected alternative and, by land use classification, the pattern shown on the plan map.

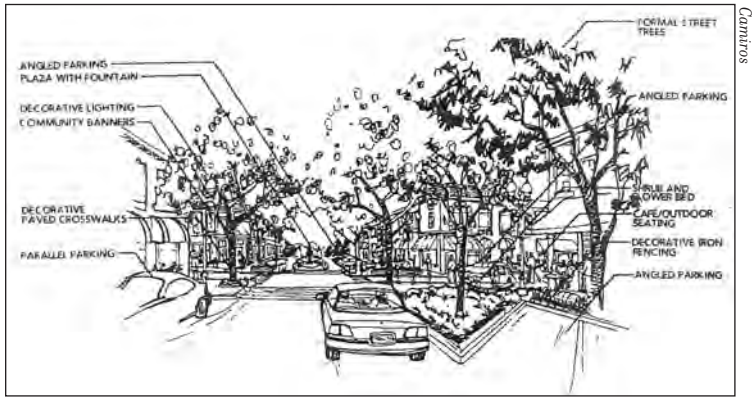
In some cases, the land use narrative might include a special, more detailed section on proposals for specific areas of the community, such as the central business district or a neighborhood shopping area, with maps and sketches.

In preparing the land use element, communities that intend to annex unincorporated land should consider what their boundaries should be, both for planning purposes and negotiation with neighboring communities, if appropriate. In planning for both land use and capital expenditures, a community needs to know what its service area will be for the next 20 to 30 years.



Camiros

The Commercial Center Concept Plan for the County Line Square sub-area in the Village of Burr Ridge in Cook County, Ill. The concept plan will indicate a parcel's proposed land uses, streets, and natural amenities to show the general configuration of a development and how it aligns with the surrounding areas.



Camiros

This commercial center sketch of County Line Square illustrates a vision fully realized by providing explicit details about the development from the perspective of a pedestrian.

An example of a land use plan narrative

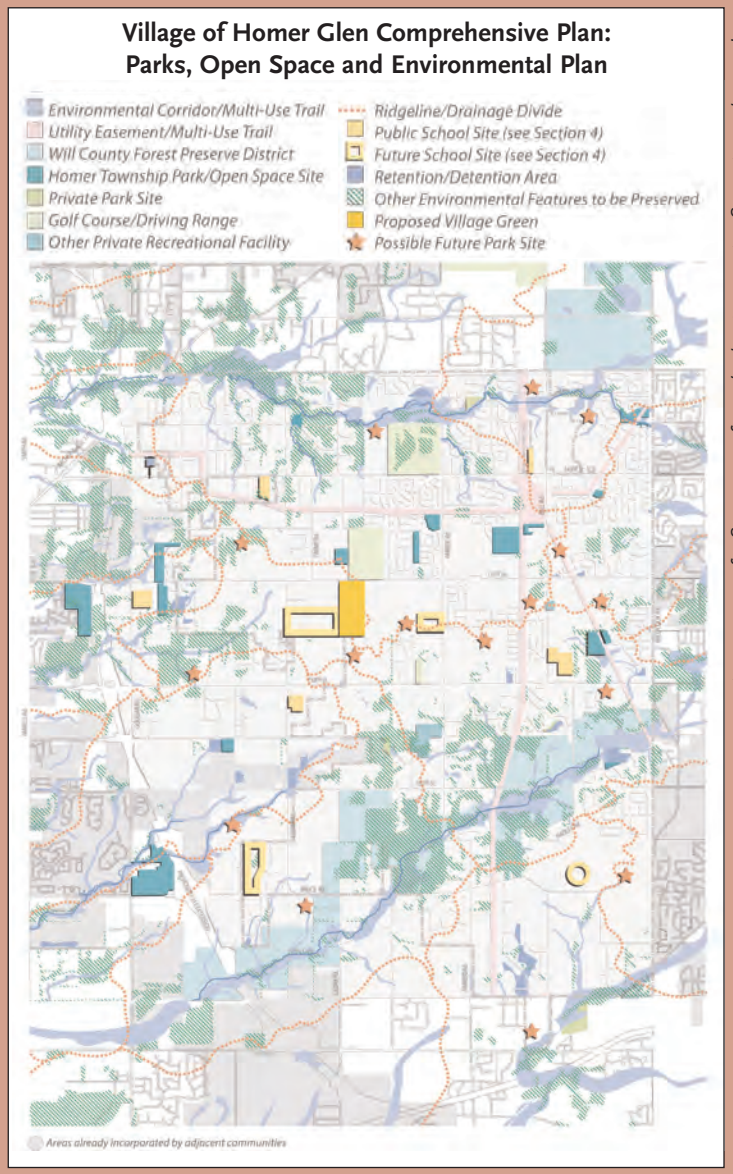
The comprehensive plan for the Village of Homer Glen in Will County, Ill.:

The Village of Homer Glen, Ill., 2005 Comprehensive Plan contains descriptions of three community shopping areas, including the 159th Street corridor:

Over time, it is anticipated that 159th Street will become Homer Glen's primary mixed-use, multi-purpose commercial corridor. The 159th Street corridor should provide sites for retail, business and personal services, offices, restaurants, business parks, public and institutional uses, and residential uses.

Most of the commercial growth areas located along 159th Street should be designed with lot depths of approximately 600 feet. This lot depth would permit an extensively landscaped setback along the arterial street, the creative clustering of commercial buildings, shared parking areas, the consolidation of access drives, open space features, and vehicular connections between commercial properties.

The village might also consider townhouses, cluster homes, and similar developments, on a case-by-case basis, around the periphery of selected commercial areas along the 159th Street corridor. Attractively designed multi-family developments in these locations could provide a "transition" in the intensity of land use between the commercial areas and single-family neighborhoods.



Prepared by Trkla, Pettigrew, Allen & Payne/URS for the Village of Homer Glen, Ill.

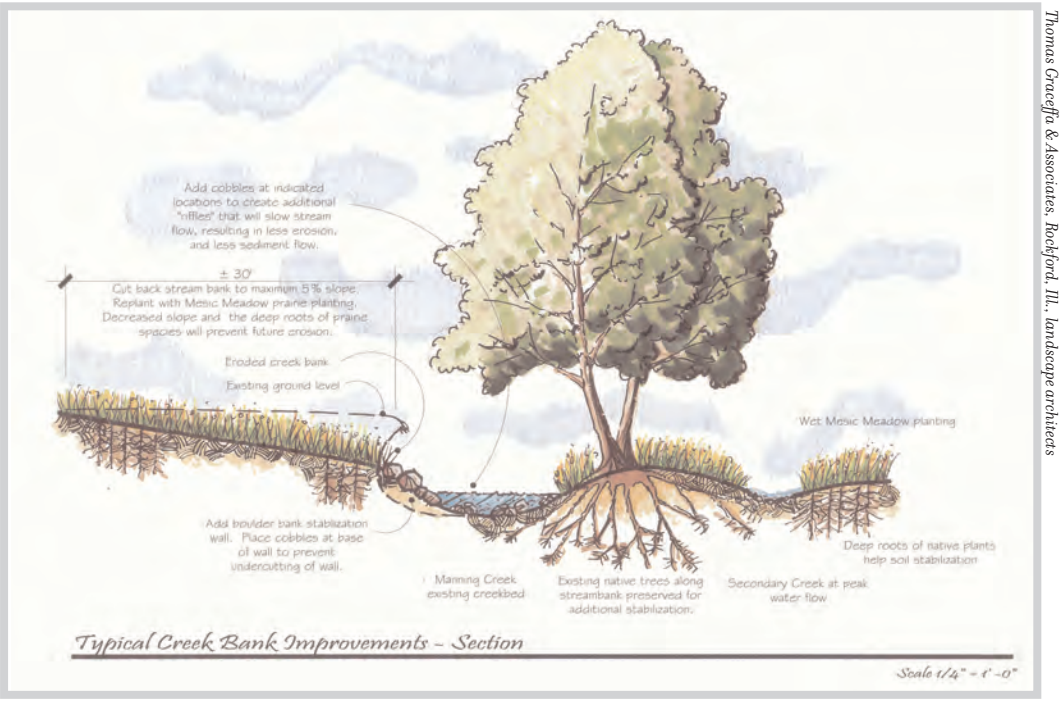
The Natural Resources Element

WHAT IS THE NATURAL RESOURCES ELEMENT?

What is natural resource protection?
Natural areas make communities more attractive, provide recreational opportunities, improve air and water quality, reduce the hazards of flooding, and provide groundwater recharge. Through careful planning, communities can grow while providing natural resource protection in conjunction with development.

What is the natural resources element?
This element includes identification of a county's natural resources that should be preserved or protected through specific actions, such as zoning code regulations or land acquisition. Conversely, land that has been harmed by pollutants and industrial waste, called brownfields, should be identified as areas for remediation. Communities should consider how to link natural resources within the community and in adjoining communities through natural resource connections, or "green infrastructure."

What is the purpose of the natural resources element?
The woodlands, grasslands, wetlands, lakes and streams in the community and region are aspects of a natural heritage that would be difficult, if not impossible, to replace if lost. In addition, natural resources and access to nature can create marketing opportunities for new development. For both reasons, natural resources must be considered in the overall plan for the community.



Thomas Graeeffa & Associates, Rockford, Ill., landscape architects

Illustrations can bring local policies to life. This cross-section illustrates how to protect the banks of a waterway.

Doug Farr for Metropolitan Planning Council

A map of green infrastructure in Elburn in Kane County, Ill. Communities must plan ahead to preserve wildlife habitat and natural resources, prevent flooding, and provide recreational opportunities for residents.

STEPS IN THE PREPARATION OF THE NATURAL RESOURCES ELEMENT

1 Determine goals.

The goal-setting process could address such topics as:

- reduced flooding;
- better fishing;
- more hiking;
- increased bicycling opportunities;
- protection of rare species; and
- reduced stormwater runoff.

2 Collect and analyze information on the natural environment and land use.

The land use section begins with an assessment of the natural environment, but the issues of sustainable development are sufficiently important to require a separate section. The comprehensive planning process needs to identify and evaluate the condition of natural resources in the community. Local plans that identify locations of sensitive natural areas provide guidance to local officials and developers as to where they may locate and promote designs for new development to minimize affects on water bodies, woodlands, wetlands, and grasslands. Site plans that cluster buildings in a development can meet the zoning requirement for allowable structures while also retaining natural areas.

Environmental goals and objectives in the Orland Park, Ill., Comprehensive Plan in southwest Cook County

The Village of Orland Park, Ill., Comprehensive Plan (1991) offers a good example of how to address policy-setting for environmentally sensitive areas:

GOAL

To identify and preserve all areas within the village with natural resources or other unique characteristics including wetlands, floodplains, prime aquifer recharge areas, surface water, significant forest cover, prairies, steep slopes, and scenic areas.

To permit only those recreational and other activities that pose no threat to sensitive natural environments and do not create a nuisance to surrounding uses.

OBJECTIVES

Use this plan as the basis for any revisions to regional Water Quality Management plans, and for local revisions to boundaries of Facility Planning Areas.

Adopt open water, wetland, and floodplain protection ordinances and be consistent with related federal and state laws that prevent the degradation of water quality and habitat. Such ordinances shall discourage the channelization of streams, preserve natural vegetative buffers adjacent to open water and wetlands, and establish reasonable building and site improvement setbacks from streams and open water.

Participate in ground water protection planning efforts of local and regional agencies.

Adopt land use regulations (including zoning, subdivision, floodplain, stormwater, wetland, and building codes) that carefully regulate development in all areas, with particular intent to safeguard environmentally sensitive areas and prohibit development in critical environmental areas.

Incorporating natural resources information in the comprehensive plan

The following information should be inventoried and mapped, preferably on GIS:

- Soils, geography and topography. In addition to understanding the type of development that can be accommodated on specific soils, understanding where and what soils are present aids in mapping where wells can be drilled.
- Watersheds, streams, water bodies, floodplains, and wetlands
- Aquifer recharge areas and delineated wellhead areas
- Vegetation (forest cover, croplands, pastures and prairies)

Natural resources should then be prioritized for protection according to:[2]

- Whether the resource is renewable or irreplaceable. If irreplaceable, the resource is more valuable.
- The rarity of the site. The less common, the more valuable the resource, particularly in the case of habitats, and rare and endangered plant and wildlife species.
- The size of the site. Generally, the larger the site, the more important.
- The diversity of plants, wildlife, scenic views, and other natural features. The greater the diversity, the more important.
- The fragility of the site, including the quality of the undisturbed site and human threats to it.

[2] *Source: Tom Daniels and Katherine Daniels, The Environmental Planning Handbook for Sustainable Communities and Regions (Chicago, Ill.: Planners Press, 2003) pp. 21, 24.*

3 Specify those areas to be protected.

After making inventories of natural resources, wetlands, floodplains, water features, remnant woodland and prairies, wet (hydric) soils, groundwater replenishment zones, steep slopes, and public open space, specify those features to be protected.

Michael Davidson, Campaign for Sensible Growth

Village of Schaumburg, Ill., Biodiversity Recovery Plan

As part of its comprehensive plan, Schaumburg, Ill., adopted a Biodiversity Recovery Plan in 2004 that addresses natural resource issues in the village.

The plan's **ECOLOGICAL ASSESSMENT** section identifies representative natural communities within the village. The assessment documents the flora and fauna of both terrestrial and aquatic habitats on open lands and includes a discussion of the potential presence of rare species.

The **NATURAL AREA RESTORATION** section provides an introduction to the philosophy behind ecological restoration and management. Several common restoration techniques are described, as well as methods of maintaining and monitoring natural areas. This section also includes suggested performance standards, specifications, and cost estimates.

The **HIGH PRIORITY SITES** section provides a closer look at the current condition of each site, assesses the impact of surrounding land use, and suggests a restoration and management plan.

The **CONSERVATION DEVELOPMENT PLANNING** section includes an overview of the principles behind conservation development. This section discusses the use of native landscaping and alternative stormwater management in new developments. Given that much of the village is already developed, information is included on retrofitting commercial and residential areas as an important avenue for restoring native habitat.

GREEN INFRASTRUCTURE are discussed as a way of connecting open spaces within the village to other natural areas in nearby municipalities. This provides an opportunity to create larger tracts of natural areas, thus providing contiguous habitat for a wide variety of wildlife.

The plan addresses **SOURCES OF FUNDING** for land acquisition, restoration activities, and education. It also describes the **ORDINANCE REVIEW PROCESS** the village went through, and highlights some of the major changes that were instituted.

Village of Schaumburg

The Village of Schaumburg in northwest Cook County, Ill., is doing its part to implement the village's Biodiversity Recovery Plan by restoring this previously degraded segment of a tributary to Salt Creek near the village hall. The orange lines outline improvements to be made to naturalize the creek.

4 Assess problems.

A natural resources element should analyze the problems affecting the specific resources to be protected. For example, there may be several desired uses for a river running through a community, including fishing and canoeing, a swimming area, a source for drinking water, and habitat for rare species. Once those uses are identified, there should be an identification of impairments, such as high levels of pollutants in the water causing unsafe drinking water, unhealthy fish, or other barriers to potential users.

Katherine Bucar, Metropolitan Planning Council

Natural resources provide ecological, recreational and economical benefits. Clean rivers invariably will draw users, for instance, these fisherman trying their luck on the Illinois River in Ottawa in LaSalle County, Ill.

5 Propose implementation measures.

For example, consider adopting stormwater management ordinances to deal with issues of runoff, or wellhead protection ordinances to protect the quality of groundwater. Alternately, planting buffers of native vegetation along streams, keeping floodplains free of over-building, and other best management practices should be employed at specific locations in the community to protect natural resources.

6 Integrate the environmental element with other local and regional plans that address natural resources, such as watershed plans, biodiversity plans, Endangered Species Act recovery plans, green infrastructure plans, greenway plans, and forest preserve plans.

A major trend in planning is the development of watershed plans. These plans protect water resources and often focus a great deal of attention on land uses in the overall watershed. Watershed plans are often funded with state and federal resources and cover areas larger than one municipality. It is important for watershed planning processes to be integrated with comprehensive planning efforts in the same jurisdiction.

There is no one fixed way to prepare a watershed plan. However, the following seven steps can increase the chances that the process will be successful. (Following these steps, which are based on guidance from the Ill. Environmental Protection Agency and U.S. Environmental Protection Agency, increases the odds that government funding will be available for implementation:)[3]

- Identify stakeholders
- Establish goals and objectives
- Inventory watershed resources and conditions
- Assess waterbody/watershed problems
- Recommend objectives and management practices for prevention and remediation
- Develop an effective action plan
- Implement plan and monitor its success

3 Acker, Richard and L. Blake Lynch, "Watershed Planning for Sustainable Communities," Campaign for Sensible Growth, Metropolitan Planning Council, and Openlands, ideas@work (vol. 4, no.2, October 2004.)

Katherine Bucar, Metropolitan Planning Council

Ackerman Creek Watershed Plan: integrating watershed planning with land use management

The Ackerman Creek Watershed Plan, prepared by the Tri-County Regional Plan Commission does a good job of integrating watershed planning with land use management.

PROBLEM STATEMENT (A): *Development and economically motivated land management have resulted in increased runoff rates and volumes resulting in erosion, sedimentation, and reduced opportunities for natural water quality controls.*

OBJECTIVES (A):

- Leave more green space/natural areas in developed areas to decrease and filter runoff.
- Enforce current stormwater ordinances.
- Review zoning ordinances pertaining to traditional development standards (i.e. curb and gutter requirements, street widths, landscaping standards).
- Upgrade ordinances as part of EPA's NPDES Phase II Stormwater Program.
- Educate public on effects of runoff in order to influence conservation practices of developers, elected officials, homeowners, and public works departments.

The Transportation Element

WHAT IS THE TRANSPORTATION ELEMENT?

The transportation element of the local comprehensive plan deals with all transportation options and how they relate to one another, as well as how they relate to other elements of the comprehensive plan. It addresses the areas in the immediate vicinity of each facility. For streets and roadways, this includes the setbacks between the street and adjacent land uses, sidewalks, curbs, intersections, and rights of way. For public transportation systems, it includes bus stops, transit stations, parking near stations, and pedestrian access to stations and bus stops.

The details of the transportation element will differ from jurisdiction to jurisdiction. In some small communities, it will only deal with roads, traffic signals, and bicyclists and pedestrian access. In larger communities, the full range of options will be examined; some of them, such as public transit or airports, may be managed by specialized government entities.

As the goals of the comprehensive plan are developed, communities must consider how transportation will affect each of them, and, conversely, how goals for transportation (e.g., reducing dependence on the automobile) could affect decisions regarding land use, housing, or employment. For example, if a community decides to increase the amount of commercially zoned land in one part of its jurisdiction, decisions must be made regarding how many additional automobile, transit, bicycle, and pedestrian trips will be generated and what additional capacity (in the form of widened streets, new traffic signals, reconfigured bus routes, additional bike lanes, etc.) will be needed in the planned area.

The transportation element is also one of the most quantitative elements of the comprehensive plan. In larger communities, it often draws on computer models to simulate how of the transportation system will operate under different assumptions or scenarios. Typical plans include analysis of service levels, transportation demand, and system needs, as well as an explanation of how local systems connect to the regional system.

Michael Davidson, Campaign for Sensible Growth

WHAT IS TRANSPORTATION PLANNING?

Land use and transportation are intertwined. Transportation planning focuses on the most effective movement of people and goods from origin to destination, in support of desired land uses and activities. It considers many different modes, including **pedestrians**, **bicycles**, **automobiles**, **freight**, **public transportation**, and, in some cases, facilities such as **ports** and **airports**.

Local leaders should consider transportation planning as a framework for a logical system that directly influences urban form and community character. Facility design must relate to urban form and functions, recognize the relationships between accessibility and transportation capacity, and improve quality of life.

Michael Davidson, Campaign for Sensible Growth

Michael Davidson, Campaign for Sensible Growth

Jim Slama, Sustain

Transportation planning covers much more than automobiles. There are economic, environmental and recreational implications of all modes of transportation, be it via rail, road, water, air or trail. (Top left): The ideal merger of land use and transportation: transit-oriented development at The Glen, a 1,121-acre, mixed-use district with new homes, offices and retail space in Glenview in northern Cook County, Ill. Public amenities include Lake Glenview, Park Center, Gallery Park, Air Station Prairie, two golf courses, and a Metra station. (Above): Trails and bikeways provide valuable recreational opportunities for communities of all shapes and sizes but increasingly serve as a commuter option in urban settings. (Bottom left): Working waterfronts are not obsolete in many American cities, including this one in Waukegan in Lake County, Ill. The industries and railyards that feed them support local economies, while the allure of a maritime culture is attracting new recreational uses, tourism, and even mixed-use developments.

WHAT IS THE PURPOSE OF THE TRANSPORTATION ELEMENT?

The transportation element's purpose is to provide and encourage a safe, convenient, efficient and economical transportation system that:

- ☐ Serves local transportation needs;
- ☐ Serves, supports and reinforces future land uses shown on the future land use map in the comprehensive plan;
- ☐ Syncs with state and regional transportation plans, including those required by federal law; and
- ☐ Establishes a logical framework for planning for current and future transportation system needs.

In order to meet these functions, the transportation element must:

- ☐ Consider all modes of transportation, including roadways, bicycle facilities, multi-use paths, pedestrian connections, public transportation, airports, railroads, sea or river ports, and freight;
- ☐ Accommodate the transportation needs of economically disadvantaged persons;
- ☐ Recognize the relationship between urban form and community character;
- ☐ Balance transportation capacity with quality of life;
- ☐ Establish the framework for acquisition, preservation and protection of existing and future rights-of-way from building encroachment; and
- ☐ Incorporate adopted (or adopt) performance measures for multiple transportation options, and ensure that adequate transportation facilities will be provided to serve, support and reinforce planned future land uses.

WHAT IS THE RELATIONSHIP OF THE TRANSPORTATION ELEMENT TO REGIONAL TRANSPORTATION PLANS?

Much transportation planning is performed at the regional level. In order to receive federal funding for transportation projects, each metropolitan region in the nation (as defined by the boundaries of the metropolitan statistical area) must prepare a long-range regional transportation plan. Regional transportation plans (RTPs) are prepared by federally designated metropolitan planning organizations (MPOs).

In addition to preparing long-range plans, MPOs are responsible for preparing and implementing regional transportation improvement plans (TIPs). The TIP is a short-term plan for implementing the RTP. It is a list of projects expected to receive federal transportation funding in the six-year time frame covered in the RTP. The TIP also lists major projects that are not funded through federal sources.

In the Chicago region, the Chicago Area Transportation Study (CATS) completed the 2030 RTP in 2003, setting forth the region's goals and objectives for maintaining and improving transportation systems through the year 2030. This plan covers the counties of Cook, DuPage, Kane, Lake, McHenry and Will, as well as part of Kendall County.

The RTP differs from the local transportation element in several important ways. The RTP is multi-jurisdictional in scope, while the local transportation element focuses on the local community. The RTP addresses transportation at the macro level, that is, the primary components of the transportation system: major arterials, regional public transportation systems, regional bikeways, etc. A local transportation plan addresses all streets at each level (i.e., arterial, collector, local) in the community, as well as other issues such as neighborhood transit access, community walkability, and traffic calming.

Michael Davidson, Campaign for Sensible Growth

Amtrak shares the rails with Metra at this commuter station in Glenview in northern Cook County, Ill. The station helps support adjacent retail and residential developments.

STEPS IN THE PREPARATION OF THE TRANSPORTATION ELEMENT

1 Craft a transportation vision statement, goals and objectives.

The transportation vision asks, "What will the transportation system look like in 10 or 20 years?" The transportation vision should flow directly from the vision for the comprehensive plan. As such, the goals and objectives of the transportation element are directed at attaining what is contemplated in the vision statement and must be consistent with the goals and objectives of the other elements of the comprehensive plan.

2 Inventory the transportation system.

A complete inventory of the community's transportation system is essential to plan effectively for current and future transportation needs. The inventory should include roads, bicycle lanes and trails, sidewalks, ports, airports, and public transportation facilities. An inventory of the regional transportation system also could include regional airports, highways, toll roads, major arterial roads, commuter rail-lines, freight routes, and railroads.

Data should be collected on:

- Capacities (e.g., the number of cars per hour that a major roadway can safely accommodate) and classifications of existing and committed transportation facilities. For example, the number and types of roadways, transit stops, etc.
- Mode split, which is the proportionate share of each transportation option used by people on their way to work, students on their trips to school, shoppers at various points in time, etc.

Key questions to ask when developing goals and objectives of a transportation element[4]

- **What transportation choices are available? Are the different transportation choices interconnected?**
- **How will the current transportation system be maintained and improved?**
- **How will the transportation safety of drivers, riders, and people on foot or bicycle be maintained and improved?**
- **What are the existing street patterns? Do the patterns promote pedestrian and bicycle travel? Are there ways to enhance and improve street connectivity?**
- **How can the transportation system enhance economic development? How will an expanded manufacturing, office, or commercial sector affect the transportation system?**
- **How will changes to the transportation system affect natural resources, such as wildlife habitats?**
- **What are the visual and aesthetic impacts of transportation facilities on the community?**
- **How will the public be involved in making transportation decisions?**
- **How will accessibility to the transportation system be maintained or improved?**
- **How can the community ensure that maintaining and preserving existing transportation facilities will reduce the need for new facilities?**
- **What steps have been or need to be taken to ensure that transportation and land use systems are compatible?**
- **How will the costs of the goals and policies outlined in the transportation element be addressed? How can the community minimize short and long-term costs of transportation systems?**
- **How do transportation facilities affect and interact with current and planned housing in the community?**

[4] *Source: Adapted from the Wis. Dept. of Transportation, Transportation Planning Resource Guide (Madison, Wis: The Department, March 2001).*

- Whether the transportation facilities are at capacity and whether additional demand can be met by other existing transportation facilities.
- The general physical and operational condition of each transportation facility.
- The provider of each transportation option.
- Plans, proposals or recommendations from relevant state, regional, or nearby local transportation agencies.

3 Analyze existing and future transportation needs.

Many quantitative transportation modeling techniques are available to determine the existing and projected needs of local transportation systems. When using these modeling techniques, it is important to fully account for the needs of land use, the environment, neighborhoods, pedestrians, bicyclists, and people with special needs. It is often necessary to consult a transportation engineer to help with modeling.

Michael Davidson, Campaign for Sensible Growth

An example of an arterial street

Michael Davidson, Campaign for Sensible Growth

An example of a collector street

Michael Davidson, Campaign for Sensible Growth

An example of a local street

Classifying roadways

Transportation plans group roadways into several different classifications according to the character of the traffic flow, degree of access they allow, and geometric design of the road.

The three main functional classifications are:

ARTERIAL

Roadways that provide the highest level of service at the greatest speed for the longest uninterrupted distance.

COLLECTOR

Roadways that provide a lower level of service at lower speeds. These roads normally collect traffic from local streets and connect them with arterials.

LOCAL

All roadways not defined as arterials or collectors. These roadways typically provide access to residential land uses.

These classifications are frequently broken down into major and minor roadways. Some states or regions also break down functional classifications into type of land use, such as rural principal or minor arterials, and urban principal and minor arterials.

4 Develop policies and recommendations.

The transportation element should provide the basis of the goals, policies and recommendations, although other elements are also important. Special attention should be paid to the impact of transportation on existing and planned communities, economic development, and natural resources.

5 Develop an implementation or action plan.

The transportation element should contain a list of physical improvements attainable through the purchase of additional rights-of-way, engineering and construction of new roads, and construction of sidewalks and bikeways, including approximate costs and sequence so they can eventually be included in the local capital improvement program. It is also important to identify projects that qualify for federal funding.

Physical improvements included on the list do not need to be large-scale. For instance, sidewalk ramps at intersections to allow disabled people to cross the street, or elevators or ramps to transit facilities should be included. Sometimes plans will contain non-physical components, such as locally operated ridesharing programs, increased traffic enforcement, or proposals to change zoning regulations to encourage transit-oriented development. Like other implementation measures in the comprehensive plan, the transportation segment should describe the action, identify the lead actor in the local government, and assign a timeline for its execution.

An excerpt from the table of goals, objectives and policies from the transportation element of the City of Elgin, Comprehensive Plan (2004) in Kane County, Ill.

Goal: Develop and implement a plan that builds on the character of the community, is sensitive to the environment, and enhances the quality of life today and in the future.

Objective: Establish guidelines and standards to enhance the land use/transportation connection.

- Develop guidelines and regulations to promote and allow transit-oriented development and revitalization.
- Encourage the location of higher density land uses at activity centers where a variety of transportation options can be provided.
- Locate greater residential densities near major employment centers to reduce travel demand and maintain air quality.
- Locate a broad mix of housing options close to employment centers to reduce home-to-work trip lengths.
- Discourage the development of strip commercial areas and focus future activity to create more clustered commercial development that minimizes trips.

Objective: Develop transportation facilities that are compatible with the surrounding neighborhoods, natural landscape, and open space.

WHAT ARE THE COMPONENTS OF A TRANSPORTATION ELEMENT?

The transportation element should address several components, including traffic circulation, public transportation, thoroughfares, corridors, context-sensitive design, traffic calming, transit-oriented development, bicycles and pedestrians, and ports, truck routes, aviation and railways. (The latter may be prepared separately.)

Components of a transportation element

TRAFFIC CIRCULATION: The traffic circulation component is an analysis of current and future systemwide needs, including average daily trips, peak-hour traffic patterns, and accident data. It should project traffic at least 10 to 20 years into the future. It also should evaluate the adequacy of evacuation routes in case of disaster.

It is here, for example, that issues regarding traffic signalization are addressed, including the need for new signals and modification of existing signal timing, the effect of on-street parking on existing road capacity, the effects of the number and placement of curb cuts on pedestrian and traffic safety, and the opportunities and constraints of creating one-way streets in downtown districts.

PUBLIC TRANSPORTATION: The transportation element should include a public transportation plan and analysis, and contain information on the current status of transit system needs. This should contain a study and inventory of existing public transportation use and facilities, including data on ridership, service frequency, characteristics of users of public transportation, vehicle hours traveled, number of vehicles, and percent auto ownership of the population. Because taxis are public transportation, local transportation plans may also address taxi service in the community.

Specific actions for improving public transportation system operations (such as adding new routes or facilities) or providing linkage with other modes of transportation (such as allowing bicycles on buses and trains) should be included, with goals and objectives based on future land use plans. For example, a rail stop is an ideal location for businesses and higher density residences as part of a transit-oriented development.

Designated public transportation stations or bus stops along frequent bus lines should trigger local officials to consider land uses that are supportive of major public transportation investments. Feedback loops between transportation and land use are basic components of a strong comprehensive planning process.

THOROUGHFARES: The transportation element should contain a thoroughfare plan depicting location of existing and proposed roadways. This is the basis of the corridor map (discussed below), and should contain specific information on planned road projects such as removal, widening, narrowing, restricting access, and providing for non-motorized transportation such as bicycle lanes. The thoroughfare plan should provide for continuity in the design of the transportation system. It should also identify how well local and neighborhood streets connect to collector and arterial roadways, and include an inventory of functional classifications, physical and aesthetic character of roadways, and an analysis of transportation connectivity.

This section also should contain an analysis of whether existing thoroughfares are adequate to meet anticipated transportation demand from current and future land uses, and plan for future thoroughfares accordingly.

The Village of Morton Grove, Ill., Comprehensive Plan

Steps needed to improve the Dempster Street corridor:

Dempster Street Target Area			
Project or Action	**Role of Village**	**Other Possible Participants & Supporters**	**Special Tools, Techniques & Resources**
Improve and upgrade Dempster Street as a mixed-use corridor providing sites for a range of retail stores, offices, service establishments, and other uses.	• Undertake a follow-up "Corridor Study" to determine a more detailed course of action for improving and enhancing Dempster Street. • Explore the applicability of the Illinois Main Street Program for use along Dempster Street. • Establish a Special Service Area (SSA) to enable area-wide improvements along the corridor.	Chamber, local lenders, and business community.	SSA; Illinois Main Street Program; Illinois FIRST. TIF may be considered in the future.
Focus commercial uses within several "nodes" near the primary intersections along Dempster Street.	• Implement any zoning or code revisions required to facilitate the repositioning of commercial uses. • Consider the use of Tax Increment Financing (TIF) to stimulate redevelopment.	Business community.	Zoning and development control codes. TIF may be considered in the future.
Promote redevelopment of selected blocks for new uses such as multi-family housing, institutions, and public facilities.	• Implement any zoning or code revisions required to facilitate redevelopment. • Consider the use of TIF to stimulate redevelopment.	Chamber, local lenders, real estate brokers, and developers.	Zoning and development control codes. TIF may be considered in the future.
Upgrade and maintain the image and appearance of the corridor.	• Undertake landscaping, signage and sidewalk improvements. • Encourage property owners to improve and upgrade existing commercial properties.	Appearance Commission, IDOT, Chamber, the business community.	SSA; Illinois Main Street Program; Illinois Transportation Enhancement Program (ITEP); Surface Transportation Program (STP).
Improve traffic capacity along the corridor without adversely impacting adjacent businesses.	• Work with IDOT to develop a mutually acceptable plan for improving traffic flow and traffic safety along this Strategic Regional Arterial.	IDOT	STP; Truck Access Funds; Grade Crossing Funds.
Provide new off-street parking to serve stores and businesses along the corridor.	• Work with IDOT to develop a mutually acceptable plan for providing off-street parking.	IDOT	STP; TIF.

Excerpted from "Comprehensive Plan Update: Village of Morton Grove," in Cook County, Ill.

CORRIDOR MAP/OFFICIAL MAP: To implement the major thoroughfare plan, the transportation element should contain a corridor map, also known as an "official map" (although an official map also may include the locations of future parks, public buildings, and major public facilities such as utilities). A corridor map designates land intended for future construction or improvement of transportation facilities in order to:

- Reserve land needed for future transportation facilities;
- Provide the basis for coordinating planned transportation facilities with new development by designating corridors where the construction of new transportation facilities is expected; and
- Protect the rights of landowners whose land is reserved in the corridor map.

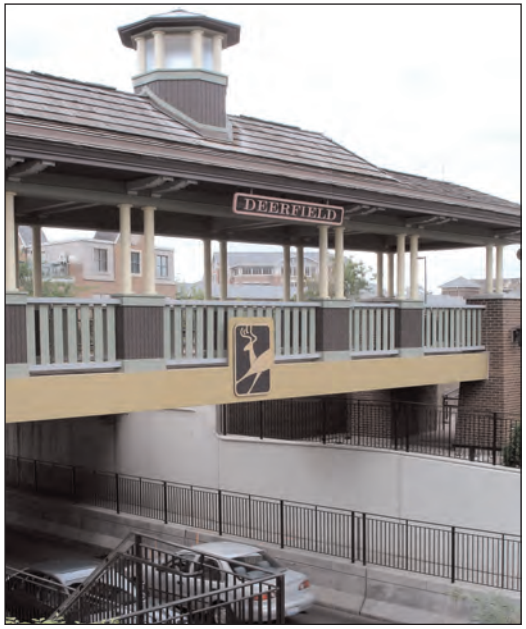
The corridor map is especially important when new subdivisions are proposed because it identifies land that needs to be either dedicated or reserved for future roadways. By consistently applying the corridor map in the development review process, the local government can ensure roads connect with one another and areas where roads eventually will be widened have additional right-of-way reservations.

CONTEXT-SENSITIVE DESIGN: An important concept in transportation planning is that every project is unique. Planners need to consider the setting and character of the area, the values and goals of the community, and the needs of transportation users in preparing transportation plans.

Assessing the context for transportation improvements requires data on the physical character and context – including site vistas, landscapes, and environmental issues – for the areas affected by future transportation plans.

Issues to consider in context-sensitive design include:

- Historic and archaeological sites and landscapes;
- Viewsheds and scenic character;
- Rivers, streams, and natural drainage features;
- Landscape edges, fences, and tree lines;
- Distant vistas, mountains, lakes, and other natural land forms;
- Agricultural areas and open space;
- Coordination with utilities; and
- Adjacent land uses in the context of the community.



Michael Davidson, Campaign for Sensible Growth

Context-sensitive design allows this transportation corridor to flow almost without notice under the viaduct of a Metra commuter station in Deerfield in Lake County, Ill. Landscaping obscures much of the infrastructure and ornamentation creates a pleasant appearance.

Planners and community leaders need to establish contacts with the people who will be directly affected by any planned developments in order to better understand the impacts of transportation projects on the local scale. People driving in cars view a community at a much different scale than do people walking on a sidewalk, so it is important to plan for the needs of people who will be most affected by transportation decisions by analyzing plans in a community-oriented context.

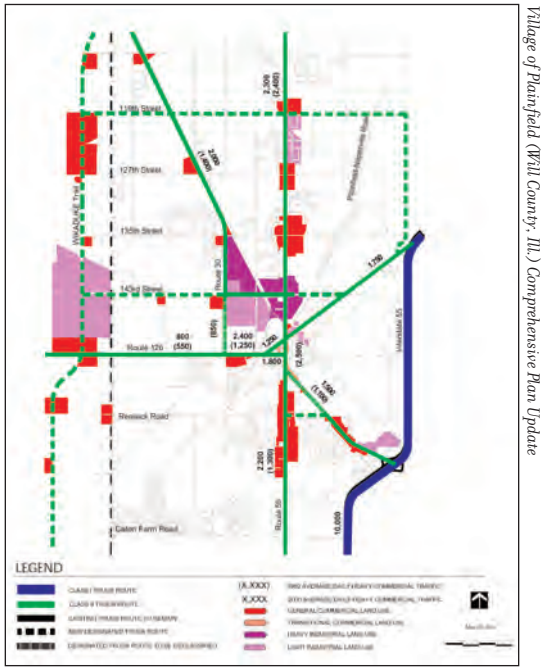
IDOT has committed to using "context sensitive solutions" in the design and implementation of transportation investments throughout the state.

TRAFFIC CALMING: Traffic calming is the combination of mainly physical measures that reduce the negative effects of motor vehicle use, alter driver behavior, and improve conditions for non-motorized street users. Examples of traffic calming measures include gateway treatments, street closures and diverters, and parking policies.

TRANSIT-ORIENTED DEVELOPMENT: With the help of land use and population projections, communities can determine where future land uses will be located. In many cases, it is a good idea to plan for denser developments near public transportation. Transit-supportive and pedestrian and bicycle friendly communities are generally synonymous with denser neighborhoods where commercial or retail areas are located near transit stops. Transit users generally begin their trips by walking or biking to a nearby transit stop, so the success of a transit system is depending, in part, on the quality of supporting land uses near transit stops. Planning for interconnected streets and dense mixed-use (instead of disconnected streets and low-density, single-use) development near transit stops will give people a range of transportation options and reduce private automobile trips.

BICYCLES AND PEDESTRIANS: Bicycle and pedestrian traffic are forms of transportation. The bicycle and pedestrian component of the transportation plan should contain an inventory of existing and proposed bicycle facilities, hiking trails, sidewalks, and horseback riding facilities. The section also should contain recommendations and standards for such facilities, possible locations for new facilities, and plans to promote walking and the use of bicycles.

PORTS, TRUCK ROUTES, AVIATION, AND RAILWAYS: The plan also should contain guidelines for freight movement, including truck routes, ports, aviation, and railways, as needed. (Port and aviation facilities often are handled by specialized authorities, which may prepare plans that are separate from the comprehensive plan.) A freight plan should contain the locations of proposed new facilities and improvements to or expansions of existing facilities, as well as measures for managing land uses adjacent to port, aviation or rail facilities. Any planned expansion of industrial land uses should be coordinated with the transportation network.



Village of Plainfield (Will County, Ill.) Comprehensive Plan Update

Village of Plainfield, Ill., Trucks Route Map

Michael Davidson, Campaign for Sensible Growth

A railyard in Waukegan in Lake County, Ill. Chicago's freight rail system made the region the national transportation hub it is today.

Chicago's 2010 Bicycle Plan

The City of Chicago's Bike 2010 Plan contains objectives and strategies for making city streets bicycle friendly. The plan also includes strategies for education, enforcement, trails, bicycle messengers, marketing, on-street bicycle facilities, parking, and public transit.

Traffic Calming

Objectives:

Implement bicycle-sensitive traffic calming and speed restriction measures that improve the traffic environment for bicycling.

NEW IDEAS: Create "home zones" on some residential streets by slowing traffic to make the streets safer for community use. The strategy is to pilot three to five home zones on local streets with many families. These are similar to "play streets" of New York City.

ROUTINE CONSIDERATION: Accommodate bicycles in all city, county and state highway reconstruction, resurfacing and streetscape projects.

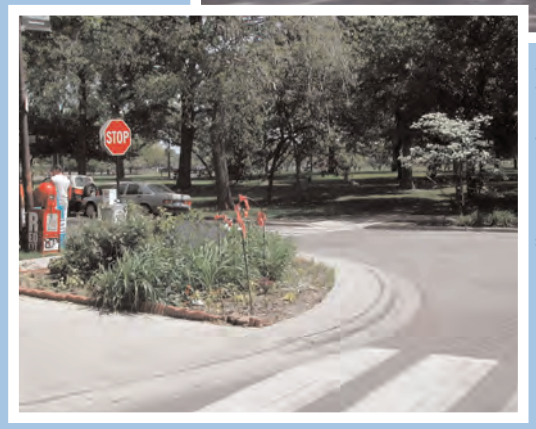
Strategies:

1. The city should proactively implement bicycle-sensitive traffic calming and speed restriction measures on residential and major streets, including cul-de-sacs, diverters, speed tables, raised intersections, chicanes and curb extensions. All residential traffic calming should accommodate through bicycle traffic.

2. Ensure that all new traffic signal detection systems are bicycle-sensitive so that bicycles can trip the green light at intersections and may safely cross the street. Retrofit existing traffic signal detection systems on the bikeway network.[5]

5 *Chicagoland Bicycle Federation, Bike 2010 Plan (City of Chicago, 2005).*

City of Chicago 48th Ward Office



City of Chicago 48th Ward Office

The narrowing of the roadway at intersections (a traffic calming device called a "neckdown") along Chicago's North Marine Drive improves the pedestrian environment by reducing crossing distance, emphasizing the crosswalk to motorists, and providing additional landscaping as a transition to Lincoln Park.

The Economic Development Element

WHAT IS THE ECONOMIC DEVELOPMENT ELEMENT?

The economic development element is that part of a comprehensive plan that describes the strategies that a local government, working on its own and with others, will engage in to promote economic health.

Economic development goals and strategies vary depending on the community. The element will:

- **Define** the local government's role in encouraging job retention, growth, and economic prosperity;
- **Assess** the government's strengths and weaknesses for attracting and retaining business and industry;
- **Relate** the local government's initiatives to the competitive economic advantages of its surrounding region; and
- **Coordinate** local economic development initiatives with state and regional initiatives.

Katherine Bucar, Metropolitan Planning Council

Economic stability for a municipality often is linked to forces beyond its borders. The vitality of downtown Utica (left) and Ottawa (right), both in LaSalle County, Ill., are largely dependent on nearby Starved Rock State Park, two major rivers that traverse the county and provide recreational and agrarian amenities, and the preservation of agricultural lands surrounding the communities.

WHAT IS ECONOMIC DEVELOPMENT?

The term economic development most often refers to efforts to accommodate and stimulate economic growth and preserve existing jobs. Economic development comes with the expansion, relocation, or retention of existing firms, creation of new firms, and attraction of firms from outside the local area. Local governments want economic development because it translates into tax revenue and produces growth through the multiplier effect of jobs creation.

Economic development is a means to pay for a community's various infrastructure and service needs, and adds to a community's quality of life through a strong economic base to support schools, parks, and cultural venues.

Economic development also includes job education and training, labor force development, and development financing (e.g., tax increment financing, industrial development bonds, low interest loans, and revolving loan funds), tax policy, and public services to businesses. Communities often seek out the participation and creation of organizations such as chambers of commerce, community development corporations, business incubators, and specialized public-private partnerships that market a community's benefits and resources and participate in development projects.

Planning for economic development is important because it responds to the needs of employers and employees in a community.

Portions of this section appeared in much different form in Meck, Stuart, and Terry Moore. Local Government Economic Development Toolbox, prepared for Envision Utah. Salt Lake City, Utah: Envision Utah, May 2005. Available online at www.envisionutah.org.

Michael Davidson, Campaign for Sensible Growth

Downtown Libertyville in Lake County, Ill. Vibrant downtowns, large or small, should be places of commerce, education and culture, each contributing in its own valuable way to the local and regional economy.

WHAT AFFECTS ECONOMIC DEVELOPMENT?

The location of businesses is often dictated by where they can maximize profitability and reduce costs.

Certain factors that affect site choices are listed below:

- **Labor:** The cost, quality and supply of labor are important, especially to service businesses. Businesses want access to a productive and skilled labor force.
- **Natural resources and supplies:** Locations close to supplies and natural resources are preferable to minimize transportation costs.
- **Transportation and access to markets:** Businesses want ready access to transportation (transit, roads and freight) so the labor pool can travel to work easily and the cost of transporting goods is minimized.
- **Land and buildings:** A supply of development-ready sites, zoned and supplied with utilities and other infrastructure, is often favored.
- **Geography:** Businesses tend to cluster. Some locate near similar businesses in order to share a labor pool and suppliers.
- **Amenity and quality of life factors:** A community with a high level of amenities (good schools, clean environment, affordable and attractive housing, and a diverse and exciting culture) attracts people. The better the quality of life, the more an area draws skilled workers, which is especially important for knowledge-based businesses.

Michael Davidson, Campaign for Sensible Growth

This vibrant commercial district in Skokie in northern Cook County, Ill., makes good use of space, including mixing uses and requiring ground-floor retail to make streets more attractive to pedestrians.

- **Government policies:** A municipality's regulations, taxes, and business incentives, as well as the availability and cost of public services and infrastructure, affect location decisions. If a local government makes it difficult to obtain a building permit or zoning approval, a prospective business may simply go to the next community.

STEPS IN THE PREPARATION OF THE ECONOMIC DEVELOPMENT ELEMENT

1 Develop a vision statement and goals.

Some type of overarching vision statement and set of goals for economic development will be formulated. Here are two examples of vision statements:

DUPAGE COUNTY, ILL.

Retain and expand existing companies.

- Attract new companies to the area.
- Support local municipal economic development efforts.
- Maximize public and private resources through partnerships.

VILLAGE OF NORTHBROOK, ILL.

"Our common economic development vision is that the Northbrook community will foster an attitude and process that continually strives to maintain and enhance a diverse tax base mix of retail, office and industrial businesses to ensure the resources to support the high quality of public services that our community desires."

Michael Davidson, Campaign for Sensible Growth

Retail development is an essential component of economic development – and the face of retail is constantly changing. This shopping center near downtown Deerfield in Lake County, Ill., is designed to create a traditional downtown shopping experience, complete with attractive, attached structures; wide sidewalks for plentiful, safe pedestrian activity; and public art for visual pleasure.

Village of Schaumburg, Ill., Economic Development Plan (Northwest Cook County, Ill.)

The Village of Schaumburg's 2004 Economic Development Plan, "Schaumburg Means Business," contains analysis of the state of local business activity, including the office, commercial, hotel and industrial sectors. In addition, the plan tracks trends in local sales tax generation. Particularly interesting is Schaumburg's comparative examination of vacancy rates of retail centers, shown below, because it indicates the village is concerned about the competitive dynamics of each of these areas.

"Woodfield Mall and Streets of Woodfield have space available, but relatively little compared to total leasable area. Shops at Schaumburg Court have 29,440 square feet, or 12 percent of its center, that is vacant. The other regional shopping centers, Scharrington Square and Target Greatland, have very little vacant space. The large Woodfield Regional Center shopping centers total 5,077,651 square feet and have a total vacancy rate of 4.8 percent, or 246,009 square feet, of available space."

Schaumburg shopping center vacancy information by region

Region	Total Retail Space (sq. ft.)	Percent of Retail Space	Vacant Space (sq. ft.)	Percent Vacant within Region
Woodfield Corridor	5,077,651	72.5	246,09	4.8
Barrington Corridor	878,607	12.6	148,254	16.8
Schaumburg Corridor	367,359	5.2	40,229	10.9
Roselle Corridor	544,986	7.8	60,732	11.1
Wise/Irving Park Corridor	131.575	1.9	18,300	13.9
Total	**7,000,178**	**100.0**	**513,524**	**7.3**

Source: Village of Schaumburg. March 2004

2 Conduct an economic baseline analysis.

Analyzing a community's economic baseline is essential because the community is positioning itself against other local governments and should include broad economic trends, the local business mix, land supply, labor force, and other economic characteristics. The analysis will be dictated by the types of businesses and industries the local government wishes to attract and retain.

The following are some studies that are part of the economic baseline analysis:

- Job trends by industry sector, and identification of businesses that could reasonably be expected to locate within the local jurisdiction.
- Existing labor force characteristics and future labor force requirements for existing and potential commercial and industrial businesses in the state and the region.
- Local and regional access to transportation and external markets for goods and services, including natural, technological, educational and human resources.
- Assessments of quality of life factors, including schools, colleges, parks and recreation, access to health care, and cultural institutions.
- Opinions of the public and business leaders – obtained through surveys, public hearings, or outreach to local businesses – regarding the appropriate role of the local government in economic development and desired types of economic development.
- Patterns of unemployment.
- Inventories of commercial, industrial and institutional land within the jurisdiction that is vacant or significantly underused. Such inventories identify the size of sites, public services and facilities, and any site constraints, such as location in a floodplain, steep slopes, weak foundation soils, or environmental contamination (brownfields).
- Assessments of organizations within the local government that could be used for encouraging economic development, and the roles and responsibilities of other organizations that are involved, including the potential for cooperation with other local governments.
- Adequacy of the existing and projected housing stock for employees of existing and potential businesses.
- Assessments of regulations and permitting procedures imposed by the local government on commercial and industrial enterprises and institutions, and their effect on the costs of doing business, as well as their effects on the attraction and retention of jobs and firms.

Communities also may use added economic analysis such as identification or determination of:

- Impact of new industries on the area's economy;
- Supply and demand for workers in particular job categories;
- Industries that are particularly suited to the area and its resources;
- Local government's strength as a regional trading and service center; and
- Types of retail activity likely to be in the most or least demand.

3 Identify economic development issues.

The baseline analysis will frame issues for the local government to discuss as part of this step. Each community will have a different set of opportunities and constraints, as well as capacity to address them. Opportunities and constraints will be affected by the community's geographic location in the region, amount of available land, size, type of physical infrastructure, amenity levels, and desires of the citizenry, among others.

4 Develop a set of policies or strategies for economic development.

Typical strategies include:

- Coordinating economic development programs and support services though a clearly defined organizational structure;
- Engaging in business development by improving business skills and management training, and providing incubator space;
- Providing development incentives and financing;
- Engaging in business attraction and retention;
- Educating the workforce;
- Ensuring an adequate land supply for commercial and industrial development;
- Providing adequate infrastructure to support commerce and industry; and
- Creating a quality of life conducive to business innovation.

Village of La Grange Economic Development Dept.

The La Grange Crossings brownfield redevelopment in central La Grange in Western Cook County, Ill., contributes to the vitality of the village center and provides convenient access to the Metra regional commuter rail system.

Questions to ask when formulating economic development strategies

- **What are the direct costs of the strategy?**
- **How will it be funded?**
- **Who will implement the strategy?**
- **How stable or accessible is the funding?**
- **What are the benefits, and can they be quantified?**
- **Do strategies need to be implemented in any particular order?**
- **Does the local government have clear legal authority to carry out the strategy?**

5 Develop an implementation or action plan.

The DuPage County Economic Development Plan outlines specific steps for industrial recruitment. Here the emphasis is on using existing businesses in the county to generate leads for new business development:

"DuPage County, Ill., is economically diverse with far-reaching potential. But its investment opportunities do not apply uniformly to all of its communities. Because a one-size-fits-all approach will not work, the county will not adopt one. Instead, strategies will be devised based on community need and particular opportunity. In certain instances, manufacturing attraction will be the best course of action. In others, commercial and retail development will be the chief pursuit. In still others, entrepreneurial development will be the proper course."

Below are some of the approaches to be used:

- Begin by tapping industry knowledge of DuPage County firms to learn about notable industry activities, mergers and acquisitions, suppliers ripe for expansion, and other insights that could signify potential business development.
- Cultivate stronger relationships with organizations that already serve DuPage County as part of their larger territory, and that routinely encounter investment leads of their own. These include, but are not limited to, Ill. Dept. of Commerce and Economic Opportunity, World Business Chicago, Illinois Coalition, area utilities, workforce and educational providers, freight forwarders, and permitting and procurement offices.
- Reach out to corporate site selection firms, business start-up intermediaries, and real estate brokers. Include boutique investment advisory firms, franchising associations, venture capital firms, and others.
- Rather than simply attending trade shows and conferences, become involved in target industry trade associations (and recruit area businesses to do the same).
- Use specialists to mine industry and business data and uncover companies ripe for facility expansion or relocation. Data to be reviewed will include employment and sales growth, new technologies, mergers and acquisitions, leadership changes, and pending facility lease decisions.

Village of Northbrook's draft economic development strategic plan (northern Cook County, Ill.)

The Village of Northbrook's draft economic development strategic plan provides a highly sophisticated matrix of actions. Reproduced below is the set of implementation measures relating to industrial activities. Note how each action is prioritized and assigned to specific local government entities to carry out.

Industrial Objective: *To reposition the village's existing industrial areas to meet changing market forces and the needs of industrial businesses in order to ensure that Northbrook can competitively retain and attract manufacturing, warehousing, and research and development business.*

Priority	Action Steps	Lead Entity	Village Resources
A	Perform a thorough study of existing industrial areas of the community to determine if zoning code requirements support their continued success.	Plan Commission and village staff	Staff time
A	Address infrastructure needs in industrial areas, such as high speed internet access to businesses in Sky Harbor.	Industrial and Commercial Development Commission (ICDC) and village staff	Staff time, consultant services, and potentially, public infrastructure costs
B	Identify means of assisting expanding businesses or new business occupying existing industrial buildings to meet current fire and life safety codes.	ICDC and Economic Development Committee	Staff time and Financial grants/loans
B	Work with property owners in Sky Harbor to promote available space in the business park and identify new appropriate uses of available space, such as a small business incubator.	Village staff and ICDC	Staff time and Community marketing materials
C	Promote the use of the 6B and Industrial Revenue Bond programs as an incentive for retention of existing businesses and attraction of new businesses.	Village board and staff	Staff time and potentially, forgone tax revenue given as incentives

Opportunities analysis from Village of La Grange, Ill., Economic Development Plan (2005)

RETAIL AND COMMERCIAL

With nearly 100 retail establishments located in the village, La Grange's retail market remains strong. Through the village's redevelopment efforts, downtown branding strategy, and public-private partnership with the business community, La Grange has broadly expanded its market. Several national retailers have expressed an interest in La Grange. The village will need to work with these businesses to identify appropriate sites for larger stores (up to approximately 20,000 sq. ft. in size), where access and infrastructure issues can be addressed. Continuing to maintain a mix of small and large businesses in the community is important.

In the years ahead, several hundred thousand square feet of new commercial and retail development may be possible in La Grange. The key to capturing this new development will be to provide appropriately sized floor space in select locations.

OFFICE

Office uses will continue to serve a support role in the La Grange economy. The market for office uses in the village will be primarily for small business and professional service firms. Current demand in the village has been met mostly in storefront space in combination with retail uses, and where allowed under current zoning, primarily in the West End Business District and the neighborhood commercial areas of the village. Future demand will come primarily from the need to replace older facilities and will be strongest from medical/dental and financial service firms.

The recent trends of "live-work" zones (areas that accommodate combined residences and small-scale work spaces) and "third place" work environments (working across wireless networks from locations other than the office or home) are workplace types that the village should seek to accommodate in the future as well.

INDUSTRIAL

La Grange has a sizable concentration of small industrial firms, clustered primarily in the northeast section of the village along the Indiana Harbor Belt (IHB) Railroad. These areas are successful and stable. Market demand for manufacturing and distribution uses remains strong. Several properties could be improved and redeveloped in locations south of Ogden Avenue. This would not only introduce new employment activities, but would help stabilize neighborhood conditions as well.

RESIDENTIAL

La Grange will continue to experience market pressure for replacement single-family detached housing, as well as new condominium development. With its quality schools, community facilities, and neighborhoods, as well as a strong sense of community, La Grange will continue to see residential reinvestment pressure for the foreseeable future.

The Housing Element

WHAT IS THE HOUSING ELEMENT?

Illinois law authorizes local governments to undertake housing plans, either as an element of the comprehensive plan or as a more specialized document intended to focus on affordable housing. The Illinois Local Planning Technical Assistance Act describes the housing element as documenting "the present and future needs for housing within the jurisdiction of the local government, including affordable housing and special needs housing." It further advises communities to "take into account the housing needs of a larger region" and "identify barriers to the production of housing, including affordable housing." Municipalities also should assess "the condition of the local housing stock; and develop strategies, programs, and other actions to address the needs for a range of housing options."

Further state action in the housing arena has highlighted the growing importance of housing planning across Illinois. In 2003, Gov. Rod Blagojevich signed Executive Order 2003-18, which created a housing task force to formalize a policy that prioritizes the housing needs of underserved constituencies, including: seniors; low-income workers who cannot afford to live near their jobs; homeless people and those at risk of becoming homeless; people with disabilities; and households currently living in affordable housing but at risk of losing their homes. The governor followed up on the work of this task force by releasing, in January 2005, *Building for Success: Illinois' Comprehensive Housing Plan*, which focuses on three themes: promoting affordability and choice for all Illinois households; creating and preserving the state's supply of affordable and workforce housing; and engaging more local and state leaders in advancing housing solutions. Updated in 2006, via *On the Road: Illinois' Comprehensive Housing Plan*, these documents emphasize the need for coordinated planning efforts – regarding housing in particular, as well as the intersection of housing with other issues such as economic development, transportation, and natural resources. The executive order was codified in 2006 when the General Assembly passed the Comprehensive Housing Planning Act (30ILCS 345/7.5).

Michael Davidson, Campaign for Sensible Growth

Michael Davidson, Campaign for Sensible Growth

Providing a variety of housing options allows communities to attract and retain valuable segments of a regional population, including workforce employees, seniors, young couples, and singles.

WHAT IS THE PURPOSE OF THE HOUSING ELEMENT?

The housing element's purpose is to provide a plan for housing preservation and creation that meets the needs of the current and future population, and reflects the community's vision for itself. The housing element also should take into account land use patterns, and transportation and economic development plans in order to accurately reflect how the municipality will change in the future.

Tanya Tucka for the Metropolitan Planning Council

The beauty of a housing element is that it accommodates for local needs, tastes and styles.

What is affordable housing?

Affordable housing is clearly a relative term.

No one wants to take on a mortgage or sign a lease for a monthly expense that interferes with his ability to pay for groceries, health care, or children's education. The general standard is that a household should pay no more than 30 percent of its income on housing and related expenses, such as utilities, home insurance, and taxes.

While homeownership nationwide is at an all-time high, moderate-income working families have actually experienced a decline in homeownership rates since 1978. The Chicago region has the additional challenge of a jobs-housing mismatch: too many people cannot afford to live near their jobs, and many of the communities providing housing affordable to the region's workforce and other lower-income households are far from transportation, employment opportunities, and other amenities. This has major cost implications on a family's monthly budget, as well as on the local business community, which pays the price of turnover and recruitment costs.

The U.S. Dept. of Housing and Urban Development estimates that the 2006 Area Median Income (AMI) in the Chicago region was $72,400. Typically, a family can reasonably afford to buy a home that is two to three times its total yearly income, depending on interest rates, taxes, household debt, and other variables. In that case, a family earning $72,400 per year could buy a home priced from $144,800 to $217,200. A family of four earning 80 percent of the AMI ($59,600) could afford to buy a home that costs from $119,200 to $178,800.

There are a number of local, state and federal programs that provide capital or operating subsidies to help bridge the gap between what low and moderate-income people can afford and what housing is available. Families earning less than 50 percent of the AMI are considered low income, while moderate-income families are those earning between 50 and 80 percent of AMI.

Recognizing these programs alone do not adequately address the demand for housing options, more and more municipalities are exploring how to channel market forces to advance their local housing goals. To meet local workforce demands, some communities and programs target housing affordable to people up to 120 percent of AMI. This somewhat fluid definition of affordable housing means that municipalities can aim to serve young families starting out, retiring seniors, and the nurses, teachers, and other households that already live or work within their borders.

STEPS IN THE PREPARATION OF THE HOUSING ELEMENT

1 Agree on a vision statement or statement of goals for housing for the community.

The nature of the vision or goals statement will depend on the community. Each community must make its own decision about where it wants to go, and how it will get there.

In 2002, the Metropolitan Mayors Caucus adopted its Housing Endorsement Criteria and Housing Action Agenda, which identify both the types of housing valued by mayors and steps to creating and preserving that housing. The endorsement criteria target housing that is well-designed, well-maintained, near jobs and transit, and available to people with a range of incomes as the type of housing that mayors want to see in their communities. Since 2002, individual municipalities and local councils of governments also have adopted the Housing Endorsement Criteria and Housing Action Agenda. For communities engaging in housing planning, adopting these documents can provide the basis of the municipality's vision for its future.

Communities can tailor specific goals to local needs and demands.

The housing element of the Elk Grove Village (Cook County, Ill.) Comprehensive Plan (2005) includes this goal:

"Provide adequate sites, including land suitable for multifamily rental housing, manufactured housing, mobile homes, housing for agricultural employees, emergency shelters, and transitional housing, to accommodate the City's share of regional housing needs through appropriate zoning and development standards."

The character and age of the community will determine the overall thrust of the housing element. In mature communities, the emphasis often will be on preserving the existing housing stock and dealing with the prospect of teardowns, rehabilitation and infill in order to provide housing options. In developing communities, the emphasis will be on assuring a diversity of housing types, and managing the development review process to ensure that quality housing is built.

2 Conduct a housing needs assessment.[6]

The needs assessment uses historical trends and data on current conditions to project the community's needs for various types of housing. As part of the needs assessment, the local government should:

- Evaluate statistics on housing conditions within the local government for all economic segments. The evaluation should include: inventorying the existing distribution of housing by type, size, gross rent, value, and, to the extent possible, condition; the existing distribution of households by gross annual income; and the number of low and moderate-income households that pay more than 30 percent of their incomes for housing. The community may want to conduct field surveys on housing condition or use existing records on housing code enforcement. This information can be summarized in maps and tables.
- Interview key informants. These are people in the community who are knowledgeable about the housing market, including community group representatives, developers, builders, bankers, real estate professionals, major employers, housing advocates, and professional planners. The interviews should be transcribed and summarized.

[6] *For an excellent guidebook on the details of housing needs analysis, see Betty Jo White, Marjorie Jensen, and Christine Cook,* Developing Community Housing Needs: Assessments and Strategies; A Self-Help Guidebook for Non-Metropolitan Communities, *prepared with the assistance of the Kansas Center for Rural Initiatives and distributed by the American Association of Housing Educators (Manhattan, Kan.: Kansas State University, 1992).*

- Evaluate and consider removing local regulatory barriers to various types of housing or housing rehabilitation, including building, housing, zoning and their related codes, and their administration.
- Conduct focus groups. These are helpful for brainstorming about issues and helping to frame them. The community should convene a series of focus groups, that are either geographically dispersed or are representative of interest groups, such as employers. In both the interviews and focus groups, the emphasis should be on highlighting community needs and determine how they can be addressed by the local government alone or working in concert with other groups.
- Assess proposals for action contained in state and regional housing plans. For example, as noted above, the State of Illinois, through the Illinois Housing Development Authority (IHDA), has adopted a comprehensive housing plan for the state.[7] This plan, which includes a set of expressed strategies to assist local governments as they develop their own comprehensive housing plans, should be reviewed to determine what resources the state may make available for local housing efforts.
- Identify the amount of vacant and buildable land (either serviced with utilities or capable of being serviced, and with no environmental constraints) available for residential construction, and the number of dwelling units that realistically could be built on such land.
- Project housing needs by comparing supply against demand. The housing needs assessment should track housing production over the past several years and project it into the future. It should then project housing demand by both unit type and income group, including low and moderate-income households. Data from regional planning agencies on population and household growth may satisfy this requirement. Alternately, the local government may want to do its own projections, or do them in more detail. In any case, the projections should include the totality of housing for all income groups and types, as well as new construction and rehabilitated units. A minimum time horizon is five years.
- Evaluate housing affordability. As part of the supply/demand analysis, there should be an assessment of whether the supply of housing in the community matches the ability of households to pay. Some of this information is available from IHDA as a result of data requirements for the Affordable Housing Planning and Appeal Act.[8]

From this analysis, a picture of housing issues in the community will emerge – whether there is enough housing, and whether the housing being constructed meets the needs of current and future residents. Typically, this analysis will be incorporated in summary form into the housing element.

[7] *See Illinois Housing Development Authority, 2006 Comprehensive Plan:On the Road to Success (Chicago: IHDA, 2006) and Building for Success: Illinois' Comprehensive Housing Plan (Chicago: IHDA, 2005).*

[8] *See Illinois Building Research Council, Report on Affordable Housing Planning and Appeal Act Public Act 93-595, as amended by Public Act 93-678, submitted to the Illinois Housing Development Authority (Chicago, Ill.: IDHA, July 23, 2004).*

Metropolitan Mayors Caucus Housing Endorsement Criteria

The Metropolitan Mayors Caucus' Housing Endorsement Criteria validate the work of Chicago-area municipalities and housing commissions to increase the availability of and access to quality housing choices, and puts this work in a regional context. These Criteria also can set local standards for specific affordable housing policy review, planning efforts, and development proposals to help communities achieve these regional goals.

A growing number of local councils of governments and communities have adopted the Housing Endorsement Criteria. For example, the Village of Arlington Heights adopted the Criteria in 2002, and has since used its principles to guide development practices, leading to the 2005 approval of the Timber Court Condominiums, a mixed-income development.

How They Work

The Criteria can be adopted by a city council or village board. Once passed, a community may gauge housing-related policies against the Criteria, request that developers demonstrate how their proposal meets the Criteria, and even give preference to those proposals that meet one or more of them. The Housing Endorsement Criteria are not meant to replace or supersede the goals identified in a community's comprehensive plan or zoning code, but rather reflect what many communities have identified as their vision. The Criteria are not mutually exclusive; a proposed development could meet one or all of them.

Location

Infill development and redevelopment within existing cities and towns, as well as new conservation developments will receive preference. In order to maximize compatibility with public transit and minimize auto use, housing within one mile of major transit service, a job hub, or town center provides a future market for transit. The project may be within two miles of a rail transit station if provisions are made to provide ongoing shuttle service to future residents. Major transit service is defined as a bus or rail stop with peak-period wait times of no more than 30 minutes. Major transit service also includes funded, but not yet built, fixed rail stations.

Land Use

New developments that aim to cluster housing in an efficient manner, in context with the surrounding community, to preserve natural resources and open space will be given priority attention. Higher densities and mixed uses are particularly appropriate near Metra and CTA stations to reduce the growth of traffic congestion on local and regional roads.

Attainability

Mixed-income housing developments, which include units accessible to moderate-income working families and to households with lower incomes, along with market-rate units in the same complex, will be given preference. Developments that help balance affordability levels within communities, while assuring consistent quality and design, will receive strong support.

Management

The management and maintenance of developments are as critical as the initial design and construction to meeting the goal of enhancing communities. Therefore, the capacity of the development team to successfully address long-term needs, as evidenced by its track record in selling, leasing and managing development properties, and its history with neighborhood and/or tenant relations, also will be considered.

Design

New developments that stress quality design and construction to help ensure their long-term contribution to the improvement of the neighborhood will be given preference. The proposed buildings will fit their setting, complementing and enhancing the existing neighborhood, and promoting a sense of community, pedestrian-friendly design, and other principles of good village design. Proposals will address transit use and access and, where appropriate, the potential for mixed use.

Following the adoption of the Housing Endorsement Criteria, the Caucus adopted a Housing Action Agenda, available at *www.mayorscaucus.org.*

3 Identify strategies and implement actions.

The Highland Park Affordable Housing Plan offers a succinct statement of the city's strategies. Noting the different target groups identified, the plan declares:

"Each group requires affordable housing, which, depending on their income level, may be in the form of rental or for-sale housing. In general, households with lower income levels are expected to need rental housing."

Regardless of tenure, three specific strategies have been identified that can help the city preserve and expand affordable housing options:

- establishing a land trust to preserve existing stock by taking it off the market and limiting appreciation;
- creating a trust fund to subsidize rehabilitation and new construction of affordable housing, as well as to become a depository of funds for the land trust; and
- implementing employer-assisted housing to improve recruitment and retention of workers in the city.

The Village of Elizabeth, Ill., proposes a schedule of actions aimed at maintaining and upgrading existing housing stock. It features a time frame and assigned responsibilities. See chart below. [9]

9 Elizabeth Plan Committee with MSA Professional Services, Inc., Village of Elizabeth, Ill., Comprehensive Plan (Draft) (Elizabeth, Ill., 2004)

Village of Elizabeth proposes a schedule of actions (Jo Daviess County, Ill.)

Action	Timeframe	Responsible Party
Work with the State of Illinois and area legislators to identify and acquire grant funds to aid in the development of a home repair program	2-5 years	Village Board, planner
Work with the U.S. Dept. of Agriculture (USDA) to develop a partnership at the local level to encourage the utilization of existing USDA programs	2-5 years	Village Board, planner
Consider developing a locally funded and controlled housing rehabilitation program	2-5 years	Village Board, planner
Through the Capital Improvement Plan (CIP), budget for the development of a locally funded housing rehabilitation program	2-5 years	Village Board, planner
Investigate the possibility of developing a building maintenance code *(See Appendix for sample code)*	2-5 years	Village Board

The Affordable Housing Planning and Appeal Act

In 2003, Illinois adopted the Affordable Housing Planning and Appeal Act, which establishes a statewide goal of 10 percent affordable housing in each community, sets forth a planning procedure that applies to local governments that do not meet the goal, and establishes a state-level appeals board to hear appeals from land use permitting decisions on affordable housing projects made by non-exempt local governments. While most local governments are not subject to the act, the legislation does provide useful approaches to include in a local housing element.

In Cook County, Ill., the Village of Northbrook's Affordable Housing Plan (see page 54) provides a good example of a local response to the law. It designates general areas that are suitable for affordable housing in the community, and proposes a series of implementing actions designed to assist housing production and meet the goal of 576 additional affordable units in the village, which is a home rule community. (Many communities believe the Affordable Housing Planning and Appeal Act does not apply to home rule municipalities. Communities should confer with their municipal attorney regarding this issue.) These implementing actions could serve as a template for other communities with similar issues.

For a comprehensive list of several housing policies and strategies, see the *Guidelines for A Model Affordable Housing Plan,* produced by the Metropolitan Mayors Caucus in response to the Affordable Housing Planning and Appeal Act (*available at www.mayorscaucus.org*). This document provides information on many of the housing policies and programs that communities can adopt in order to provide a range of housing options. Furthermore, the *Guidelines* can be used by any municipality looking to create or preserve affordable housing, regardless of whether it falls below the 10 percent state standard.

City of Highland Park

The Temple Avenue Townhouse Project, consisting of six affordable townhouse units, exemplifies Highland Park's commitment to providing housing for a range of income levels.

City of Highland Park

Sunset Woods in Highland Park in Lake County, Ill., is a successful example of a development that was undertaken by the for-profit Brinshore Development and the nonprofit Housing Opportunity Development Corporation to bring affordable housing to a community with very high property values.

Estimated Five-Year Production and Resource Goals

- The Chicago Affordable Housing Plan commits nearly $1.9 billion to construct, preserve or otherwise assist 48,000 units of affordable housing from 2004 through 2008.
- Of the 48,000 units that will be assisted under the new plan, nearly 27,000 will be rental units that are created or preserved, 6,000 will be units that are supported by homeownership programs, and more than 12,000 will be single-family homes that are improved or preserved.
- Resources are targeted to serve those most in need. Eighty percent of the units assisted will serve households at or below 60 percent of the area median income. Rental programs will be more aggressively targeted – 85 percent of the units assisted will serve households at or below 50 percent of the area median income.
- The resources committed (nearly $1.9 billion) come from a variety of sources, including city resources, which total $153 million; CDBG; HOME; and bond proceeds.
- The amount of city resources committed is a 25 percent increase over the last five-year plan. In addition to corporate dollars, DOH utilizes TIF funds, GO bonds, city land, and fee waivers.

Setting a Goals and Strategies: Chicago's Affordable Housing Plan 2004 - 2008

Build • Preserve • Lead: A Housing Agenda for Chicago's Neighborhoods

The City of Chicago's Affordable Housing Plan identifies strategies to implement in order to meet the goals set in the Plan.

Setting the Scene: Chicago prospered in the 1990s; however, the need for affordable housing continues. Chicago and other urban areas share a number of housing challenges:

- Affordability – 225,000 renters and 73,000 homeowners pay more than 30 percent of household income for housing.
- Aging housing stock – 438,000 units are 60 years old or more.
- Limited resources at all levels of government.

Planning Process: The 2004 – 2008 plan is the result of an extensive planning process.

- Dept. of Housing (DOH) convened seven meetings of an advisory group that was comprised of 41 housing stakeholders.
- DOH also received input from national experts and heard comments from approximately 60 individuals at three public hearings.

Four Core Strategies: Under the new plan, DOH is focusing on four core strategies: build, preserve, assist households, and lead.

BUILD

The creation of new units is the fundamental way to expand affordable housing; virtually no affordable housing is built without government assistance.

PRESERVE

Given Chicago's aging housing stock and the high cost of developing new housing, it is important to preserve the existing stock of affordable housing.

ASSIST HOUSEHOLDS

DOH provides assistance to individual households to enhance affordability and help residents stay in their homes.

LEAD

DOH pursues policies and funding to support affordable housing.

Excerpts from Highland Park Affordable Housing Plan (Lake County, Ill.)

A good example of a housing element summary comes from the Highland Park Affordable Housing Plan (2001). The introduction to the plan contains a concise summary of housing issues facing the community and addressed by the plan.

The City of Highland Park has a long history of offering a wide range of housing options to meet the community's needs. In the last decade, the mix of options has narrowed as the city has experienced change in its population and housing stock. Since 1990, there have been 1) an increase in housing values, 2) a decrease in the supply of affordable housing, and 3) a decrease in income diversity.

Specific evidence of a growing need for affordable housing includes the following changes:

- The income diversity of Highland Park households has been decreasing through the 1990s, affecting specific groups identified below.
- At least 324 affordable rental units are estimated to have been lost since 1990.
- Between 1993 and 1999, the median sales price of a home increased 17.2 percent, from $238,750 to $332,000. A minimum annual household income of $108,000 is needed to afford the median 1999 home price of $332,000.
- The average home mortgage loan has increased 20 percent between 1993 and 1997.
- Since 1993, the share of home mortgages going to households making less than 80 percent of the metropolitan area median income has declined.

Based on the data and input from the community and city officials, the following five groups of people have been identified as being in need of affordable housing:

- workers employed in Highland Park who cannot afford to live in the city;
- seniors often living on fixed and limited incomes;
- single-parent families that are struggling due to a drop in income attributed to divorce or loss of a spouse;
- young households, many which grew up in the community, seeking starter homes; and
- persons with disabilities who require affordable and accessible housing.[10]

[10] *Natalie P. Voorhees Center for Neighborhood and Community Improvement, University of Illinois at Chicago, Highland Park, Ill., Affordable Housing Plan (Chicago: Voorhees Center, 2001).*

Village of Riverdale (Cook County, Ill.)

The Village of Riverdale, Ill., in southern Cook County undertook a number of planning activities between 2000 and 2003, including two transit-oriented development plans and a housing plan focused on a specific disinvested neighborhood, Pacesetter. By reaching out to Urban Land Institute Chicago and the Campaign for Sensible Growth, a technical assistance panel of volunteer experts was assembled to address the needs of the neighborhood. By analyzing the existing conditions, market potential, and alternative development scenarios, the team put together a strategy that has since been implemented by village staff and officials, including recruiting Holsten Development Co., an experienced developer of mixed-income and affordable communities. After years of concern over the living conditions of the area, local residents and landowners expressed strong support for the project at an August 2005 kick-off meeting hosted by the Riverdale Village Board. The first phase of the redevelopment will be a $35 million gut rehab project along Lowe Avenue, followed by three additional phases to include 60 percent homeownership and 40 percent rental units. This redevelopment, along with progress made on the transit-oriented plans, has shown the importance of advanced planning, local leadership, and strong execution of an idea translated into a robust, implementable plan.

Proposed incentives for affordable housing: Northbrook, Affordable Housing Plan (Cook County, Ill.)

Zoning:

- Inclusionary zoning to require new multifamily developments and redevelopments to include a minimum required amount of affordable housing. Such ordinances also may allow a developer to provide the required affordable housing off site (such as through other new construction or rehab) or pay a fee into an affordable housing fund in lieu of providing the required affordable housing on site.
- Amendments to the zoning map and comprehensive plan to allow the expansion of the number of multifamily locations for affordable housing development.
- Bonuses or other incentives regarding zoning requirements for developers who provide affordable housing, such as reduced parking, lot size, setback or lot coverage requirements, or increased density.
- Fee reductions or waivers for zoning-related costs for those providing affordable housing.
- Expedited processing of zoning applications for those proposing to provide affordable housing.
- Accessory living units authorized as permitted uses in selected zoning districts.

Financing:

- Reduced building permit fees for affordable units.
- Municipal property tax abatements.
- Reductions to or waivers of required impact fees or village utility rates.
- Coordination with an affordable housing developer attempting to use Illinois Housing Development Authority Housing Trust Funds (matching funds) or other nonprofit grant funds.
- Establishment of a Community Land Trust to acquire and maintain ownership of land for affordable housing and to assist in ensuring the rental and for-sale housing it holds remains affordable.
- Cooperation with local businesses that wish to implement employer-assisted housing programs to expand housing options for the employer's workforce, whether the employer is private sector or governmental. Examples of such programs may include down payment assistance, rental subsidies, or contracting with community-based housing organizations to assist employees with housing choices.
- Adoption of a special tax or fee for demolition of residential uses to help fund affordable housing initiatives.
- Rehabilitation or redevelopment of existing structures for conversion to affordable housing or to maintain existing affordable housing by private or public sector entities. One such conversion is the village's own Crestwood Place, which provides senior citizen affordable housing in an unused school building.[11]

11 Village of Northbrook, Ill., Affordable Housing Plan (2005).

APPENDIX A: REFERENCE LIST

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APPENDIX B: WEB RESOURCES

American Planning Association	www.planning.org
Business and Professional People for the Public Interest	www.bpichicago.org
Campaign for Sensible Growth	www.growingsensibly.org
Chicago Area Transportation Study	www.catsmpo.com
Chicago Metropolis 2020	www.chicagometropolis2020.org
Chicago Metropolitan Agency for Planning	www.chicagoareaplanning.org
Congress for the New Urbanism	www.cnu.org
DuPage Mayors and Managers Conference	www.dmmc-cog.org
enterpriz Cook County	www.enterpriz.org
Illinois Housing Development Authority	www.ihda.org
International Council of Shopping Centers	www.icsc.org
McHenry County Council of Governments	www.mchenrycountycog.org
Metropolitan Mayors Caucus	www.mayorscaucus.org
Metropolitan Planning Council	www.metroplanning.org
Northeastern Illinois Planning Commission	www.nipc.org
Northwest Municipal Conference	www.nwmc-cog.org
South Suburban Mayors and Managers Association	www.ssmma.org
Southwest Conference of Mayors	www.swmayors.com
State of Illinois Home Page	www.illinois.gov
Urban Land Institute	www.uli.org
U.S. Census Bureau	www.census.gov
U.S. Environmental Protection Agency	www.epa.gov
U.S. Department of Housing and Urban Development	www.hud.gov
West Central Municipal Conference	www.westcook.org
Will County Governmental League	www.wcgl.org

APPENDIX C: LEGISLATION

Note: These laws are current as of Jan. 1, 2006. Check the Illinois Compiled Statutes for the most current versions.

Plan Commissions

(65 ILCS 5/11-12-4 et seq.)

(excerpts)

65 ILCS 5/11-12-4
From Ch. 24, par. 11-12-4
Sec. 11-12-4.

Every municipality may create a plan commission or a planning department or both. A plan commission shall be appointed by a mayor of a city or president of a village board subject to confirmation by the corporate authorities. Members of the plan commission shall reside within the municipality or within territory contiguous to the municipality and not more than one and one-half miles beyond the corporate limits and not included within any other municipality. A planning department shall be created, organized and staffed in such manner as the municipality may provide by ordinance. The plan commission shall consist of a chairman and members serving for such terms and such compensation, if any, as the corporate authorities of the municipality may prescribe by ordinance. The ordinance may provide that the plan commission shall have a paid secretary or staff or both. Any plan commission or planning department now existing and officially created by ordinance of any municipality may continue to function under the authority of such prior ordinance and any such plan commission or planning department shall have and exercise all the powers conferred by law as fully as if it had been created hereunder. Any municipality which has or shall hereafter create a plan commission or planning department may appropriate from any funds under its control and not otherwise appropriated, such sums as the corporate authorities may deem proper for the maintenance and operation of such plan commission or planning department, including the salaries of all paid members and employees; the development of a planning program; the preparation of regulations, projects and programs pertinent to the development, redevelopment and renewal of the municipality and such surrounding territory over which the municipality exercises subdivision jurisdiction; the preparation and revision of the official map and the exercise of such powers germane to the purposes for which it was created as may be conferred upon the plan commission or planning department by ordinance.

Municipalities may accept, receive and expend funds, grants and services from the federal government or its agencies, or from the State of Illinois or its agencies, or from private persons or corporations or foundations for planning purposes generally or for planning specific projects.

Source: P. A. 76-601.

65 ILCS 5/11-12-4.1
From Ch. 24, par. 11-12-4.1
Sec. 11-12-4.1.

Whenever a municipality of more than 500,000 population has created a plan commission pursuant to the provisions of this Division 12, every plan, design or other proposal by any public body or agency which requires the acquisition or disposition of real property within the territorial limits of the municipality by any public body or agency, or which changes the use of any real property owned or occupied by any public body or agency or the location of any improvement thereon within the territorial limits of the municipality, shall be referred to the plan commission by such public body or agency not less than 30 days prior to any election for the purpose of authorizing the borrowing of money for, or any action by such public body or agency to appropriate funds for, or to authorize such changes or the acquisition or disposition of such real property, but in no event shall such referral be less than 30 days prior to making such changes or acquiring or disposing of such real property. The plan commission shall review every such plan, design or other proposal and shall within 30 days after submission thereof report to the public body or agency having jurisdiction over such real property or improvement thereon concerning the conformity of the plan, design or other proposal with the long-range planning objectives of the

municipality and with the official plan for the municipality or any part thereof if the same shall then be in effect as provided in Section 11-12-2. Such report shall be spread of record in the minutes or record of proceedings of such public body or agency. A report that any such plan, design or other proposal is not in conformity with the long-range planning objectives of the municipality, or the official plan for the municipality shall be accompanied by a written statement of the respects in which such conformity is lacking but such a report shall not bar the public body or agency having jurisdiction over such real property or improvement thereon from thereafter making such changes or acquiring or disposing of such real property. The failure of the plan commission to report on any such plan, design or other proposal within 30 days after submission of the same to it, shall be deemed to be a report that such plan, design or other proposal conforms in all respects with the long-range planning objectives and the official plan of the municipality.

As used in this section the terms "public body" or "agency" include the State of Illinois, any county, township, district including the Chicago Park District, school, authority, municipality, or any official, board, commission or other political corporation or subdivision of the State of Illinois, now or hereafter created, whether herein specifically mentioned or not.

Source: P.A. 81-411.

65 ILCS 5/11-12-5

From Ch. 24, par. 11-12-5
Sec. 11-12-5.

Every plan commission and planning department authorized by this division 12 has the following powers and whenever in this Division 12 the term plan commission is used such term shall be deemed to include the term planning department:

(1) To prepare and recommend to the corporate authorities a comprehensive plan for the present and future development or redevelopment of the municipality. Such plan may be adopted in whole or in separate geographical or functional parts, each of which, when adopted, shall be the official comprehensive plan, or part thereof, of that municipality. This plan may include reasonable requirements with reference to streets, alleys, public grounds, and other improvements hereinafter specified. The plan, as recommended by the plan commission and as thereafter adopted in any municipality in this state, may be made applicable, by the terms thereof, to land situated within the corporate limits and contiguous territory not more than one and one-half miles beyond the corporate limits and not included in any municipality. Such plan may be implemented by ordinances (a) establishing reasonable standards of design for subdivisions and for resubdivisions of unimproved land and of areas subject to redevelopment in respect to public improvements as herein defined; (b) establishing reasonable requirements governing the location, width, course, and surfacing of public streets and highways, alleys, ways for public service facilities, curbs, gutters, sidewalks, street lights, parks, playgrounds, school grounds, size of lots to be used for residential purposes, stormwater drainage, water supply and distribution, sanitary sewers, and sewage collection and treatment; and (c) may designate land suitable for annexation to the municipality and the recommended zoning classification for such land upon annexation.

(2) To recommend changes, from time to time, in the official comprehensive plan.

(3) To prepare and recommend to the corporate authorities, from time to time, plans for specific improvements in pursuance of the official comprehensive plan.

(4) To give aid to the municipal officials charged with the direction of projects for improvements embraced within the official plan, to further the making of these projects, and, generally, to promote the realization of the official comprehensive plan.

(5) To prepare and recommend to the corporate authorities schemes for regulating or forbidding structures or activities which may hinder access to solar energy necessary for the proper functioning of solar energy systems, as defined in Section 1.2 of The Comprehensive Solar Energy Act of 1977, or to recommend changes in such schemes.

(6) To exercise such other powers germane to the powers granted by this article as may be conferred by the corporate authorities.

(7) For purposes of implementing ordinances regarding developer donations or impact fees, and specifically for expenditures thereof, "school grounds" is defined as including land or site improvements, which include school buildings or other infrastructure necessitated and specifically and uniquely attributed to the development or subdivision in question. This amendatory Act of the 93rd General Assembly applies to all impact fees or developer donations paid into a school district or held in a separate account or escrow fund by any school district or municipality for a school district.

Source: P.A. 93-330, eff. 7-24-03.

65 ILCS 5/11-12-6
From Ch. 24, par. 11-12-6
Sec. 11-12-6.

An official comprehensive plan, or any amendment thereof, or addition thereto, proposed by a plan commission shall be effective in the municipality and contiguous area herein prescribed only after its formal adoption by the corporate authorities. Such plan shall be advisory and in and of itself shall not be construed to regulate or control the use of private property in any way, except as to such part thereof as has been implemented by ordinances duly enacted by the corporate authorities. At any time or times, before or after the adoption of the official comprehensive plan by the corporate authorities, such corporate authorities may designate by ordinance an official map, which map may consist of the whole area included within the official comprehensive plan or one or more separate geographical or functional parts, and may include all or any part of the contiguous unincorporated area within one and one-half miles from the corporate limits of the municipality. Such map or maps shall be made a part of the ordinance, which ordinance shall specifically state standard requirements of the municipality relating to size of streets, alleys, public ways, parks, playgrounds, school sites, other public grounds, and ways for public service facilities; the kind and quantity of materials which shall be used in the construction of streets, and alleys; and the kind and quality of materials for public service facilities as may be consistent with Illinois Commerce Commission or industry standards, and shall contain the standards required for drainage and sanitary sewers and collection and treatment of sewage. The map shall be drawn to scale, shall be reasonably accurate, and shall show north point, section lines and numbers, and streams.

Said official comprehensive plan and the ordinance or ordinances including the official map shall be placed on file with the Municipal Clerk and shall be available at all times during business hours for public inspection. Copies of said plan, all ordinances implementing the same and including the official map, shall be made available to all interested parties upon payment of such sum as the corporate authorities shall determine to be adequate to reimburse the general fund of the municipality for the cost of printing and distributing the same.

Source: Laws 1961, p. 2757.

65 ILCS 5/11-12-7
From Ch. 24, par. 11-12-7
Sec. 11-12-7.

The corporate authorities may initiate plans and maps by requesting the plan commission to prepare an official comprehensive plan and recommend the same, or may originate an official comprehensive plan, or a part thereof, or an amendment thereto, and may refer same or suggested changes in an existing comprehensive plan to the plan commission for its consideration and recommendation thereon. No comprehensive plan or amendment thereto shall be adopted that has not been submitted to the plan commission.

The corporate authorities may adopt parts of a comprehensive plan recommended by a plan commission without adopting the entire comprehensive plan as recommended, or may modify or amend portions of a recommended comprehensive plan without a re-reference of same to the plan commission, and may adopt such comprehensive plan, as modified or amended. Such comprehensive plan, when adopted, shall be the official comprehensive plan, or part thereof, of that municipality.

Upon submission by the corporate authorities of any suggested comprehensive plan, part thereof, or amendment to an existing comprehensive plan to the plan commission for consideration and recom-

mendation, the corporate authorities may require a report thereon from the plan commission with its recommendation within 90 days from the date of such submission, and if the plan commission shall fail to make such report within such 90 days, then the corporate authorities may proceed to consider such comprehensive plan, or part thereof or amendment to an existing comprehensive plan, for adoption, including arranging for and holding of a public hearing thereon in accordance with the provisions hereinafter contained in the same manner as if the plan commission had made its recommendation.

On and after the effective date of this amendatory act of 1961, an official comprehensive plan, or any amendment thereof, shall not be adopted by a municipality until notice and opportunity for public hearing have first been afforded in the manner herein provided. Upon submission of a comprehensive plan by the plan commission, or a proposed amendment to an existing comprehensive plan, the corporate authorities shall schedule a public hearing thereon, either before the plan commission or the corporate authorities. Not less than 15 days' notice of the proposed hearing, and the time and place thereof, shall be given by publication in a newspaper of general circulation in the county or counties in which the municipality and contiguous unincorporated territory are located. The hearing shall be informal, but all persons desiring to be heard in support or opposition to the comprehensive plan or amendment shall be afforded such opportunity, and may submit their statements, orally, in writing, or both. The hearing may be recessed to another date if not concluded, if notice of the time and place thereof is publicly announced at the hearing or is given by newspaper publication not less than 5 days prior to the recessed hearing.

Within 90 days after the conclusion of the hearing, the corporate authorities, after consideration of the recommendation of the plan commission and such information as shall have been derived from the hearing, shall either adopt the comprehensive plan or amendment in whole or in part or reject the entire comprehensive plan or amendment. If adopted, the corporate authorities shall enact the ordinance including a map or maps as hereinbefore provided. In adopting an official comprehensive plan, except as herein otherwise provided, the corporate authorities shall be subject to the same limitations as to subject matter as apply to the plan commission. If at the expiration of such 90 days, the corporate authorities have taken no formal action, the comprehensive plan or amendment thereto may thereafter not be acted upon by the corporate authorities without again complying with the conditions of notice and hearing heretofore provided.

No official map, or amendment or addition thereto, shall be ground for rejection of any plat of subdivision or resubdivision by the corporate authorities, if application for final approval of such subdivision or resubdivision is filed with the corporate authorities 15 days or more prior to the date on which the ordinance approving the official map, or amendment or addition thereto, is adopted.

The comprehensive plan or amendment shall become effective upon the expiration of 10 days after the date of filing notice of the adoption of such comprehensive plan or amendment with the recorder of the county. Whenever used in this Section 11-12-7 the words "plans" or "comprehensive plan" shall be deemed to mean and include, where applicable, an official map or maps.

(Source: P.A. 83-358.)

Local Planning Technical Assistance Act

(Public Act 92-0768)

AN ACT concerning local planning.

Be it enacted by the People of the State of Illinois, represented in the General Assembly:

Section 1. Short title. This Act may be cited as the Local Planning Technical Assistance Act.

Section 5. Purposes. The purposes of this Act are to:

(1) Provide technical assistance to Illinois local governments that request it for the development of local planning ordinances and regulations.

(2) Encourage Illinois local governments to engage in planning, regulatory, and development approaches that promote and encourage comprehensive planning.

(3) Prepare and distribute model ordinances, manuals, and other technical publications that promote and encourage comprehensive planning.

(4) Research and report upon the results and impact of activities funded by the demonstration grants.

(5) Support local planning efforts in communities with limited financial means.

(6) Support planning efforts that include one or more units of local government or planning agencies working together.

Section 10. Definitions. In this Act:

"COMPREHENSIVE PLAN" means a regional plan adopted under Section 5-14001 of the Counties Code, an official comprehensive plan adopted under Section 11-12-6 of the Illinois Municipal Code, or a local land resource management plan adopted under Section 4 of the Local Land Resource Management Planning Act.

"DEPARTMENT" means the Department of Commerce and Community Affairs.

"LAND DEVELOPMENT REGULATION" means any development or land use ordinance or regulation of a county or municipality including zoning and subdivision ordinances.

"LOCAL GOVERNMENT" or "unit of local government" means any city, village, incorporated town, or county.

"SUBSIDIARY PLAN" means any portion of a comprehensive plan that guides development, land use, or infrastructure for a county or municipality or a portion of a county or municipality.

Section 15. Technical assistance grants.

The Department may make grants to units of local government to develop, update, administer, and implement comprehensive plans, subsidiary plans, land development regulations, development incentives, market feasibility studies, and environmental assessments that promote and encourage the principles of comprehensive planning. Comprehensive planning includes appropriately and proportionally weighing the elements listed in Section 25 of this Act and including them within the comprehensive plan.

The Department may adopt rules establishing standards and procedures for determining eligibility for the grants, regulating the use of funds under the grants, and requiring periodic reporting of the results and impact of activities funded by the grants. No individual grant under this Act may have duration of more than 24 months.

The Department, in the determination of grantees, may also seek an even balance of grants within metropolitan regions.

Section 20. Model ordinances and technical publications.

The Department may prepare model ordinances, manuals, and other technical publications that are founded upon and promote comprehensive planning. The Department may make all possible use of existing model ordinances, manuals, and other technical publications that promote and encourage comprehensive planning and that were prepared by regional planning agencies and commissions, councils of government, and other organizations.

The Department may employ or retain private not-for-profit entities, regional planning agencies and commissions, councils of government, and universities to advise, prepare, or conduct the preparation of the model ordinances, manuals, and other technical publications.

The Department may distribute any model ordinances, manuals, and other technical publications prepared under this Section to all counties and municipalities in this State, regional planning agencies and commissions in this State, the Illinois State Library, all public libraries in this State, and to other organizations and libraries at the Department's discretion.

Section 25. Use of technical assistance grants.

(A) Technical assistance grants may be used to write or revise a local comprehensive plan. A comprehensive plan funded under Section 15 of this Act must address, but is not limited to addressing, each of the following elements:

(1) ISSUES AND OPPORTUNITIES. The purpose of this element is to state the vision of the community, identify the major trends and forces affecting the local government and its citizens, set goals and standards, and serve as a series of guiding principles and priorities to implement the vision.

(2) LAND USE AND NATURAL RESOURCES. The purpose of this element is to translate the vision statement into physical terms; provide a general pattern for the location, distribution, and characteristics of future land uses over a 20-year period; and serve as the element of the comprehensive plan upon which all other elements are based. The land use element must be in text and map form. It must include supporting studies on population, the local economy, natural resources, and an inventory of existing land uses.

(3) TRANSPORTATION. The purpose of this element is to consider all relevant modes of transportation, including mass transit, air, water, rail, automobile, bicycle, and pedestrian modes of transportation; accommodate special needs; establish the framework for the acquisition, preservation, and protection of existing and future rights-of-way; and incorporate transportation performance measures.

(4) COMMUNITY FACILITIES. (schools, parks, police, fire, and water and sewer). The purpose of this element is to provide community facilities; establish levels of service; ensure that facilities are provided as needed; and coordinate with other units of local government that provide the needed facilities.

(5) TELECOMMUNICATIONS INFRASTRUCTURE. The purpose of this element is to coordinate telecommunications initiatives; assess short-term and long-term needs, especially regarding economic development; determine the existing telecommunications services of telecommunications providers; encourage investment in the most advanced technologies; and establish a framework for providing reasonable access to public rights-of-way.

(6) HOUSING. The purpose of this element is to document the present and future needs for housing within the jurisdiction of the local government, including affordable housing and special needs housing; take into account the housing needs of a larger region; identify barriers to the production of housing, including affordable housing; access the condition of the local housing stock; and develop strategies, programs, and other actions to address the needs for a range of housing options.

(7) ECONOMIC DEVELOPMENT. The purpose of this element is to coordinate local economic development initiatives with those of the State; ensure that adequate economic development opportunities are available; identify the strategic competitive advantages of the community and the surrounding region; assess the community's strengths and weaknesses with respect to attracting and retaining business and industry; and define the municipality's and county's role.

(8) NATURAL RESOURCES. The purpose of this element is to identify and define the natural resources in the community with respect to water, land, flora, and fauna; identify the land and water areas in relation to these resources; assess the relative importance of these areas to the needs of the resources; and identify mitigation efforts that are needed to protect these resources.

(9) PUBLIC PARTICIPATION. This element must include a process for engaging the community in outreach; the development of a sense of community; a consensus building process; and a public education strategy.

(10) COMPREHENSIVE PLANS. Plans may also include the following: natural hazards; agriculture and forest preservation; human services; community design; historic preservation; and the adoption of subplans, as needed. The decision on whether to include these elements in the comprehensive plan shall be based on the needs of the particular unit of local government.

(B) The purpose of this Section is to provide guidance on the elements of a comprehensive plan but not to mandate content.

Section 30. Consistency of land use regulations and actions with comprehensive plans.

(A) If a municipality or county is receiving assistance to write or revise a comprehensive plan, for 5 years after the effective date of the plan, land development regulations, including amendments to a zoning map, and any land use actions should be consistent with the new or revised comprehensive plan. "Land use actions" include preliminary or final approval of a subdivision plat, approval of a planned unit development, approval of a conditional use, granting a variance, or a decision by a unit of local government to construct a capital improvement, acquire land for community facilities, or both.

(B) Municipalities and counties that have adopted official comprehensive plans in accordance with Division 12 of Article 11 of the Illinois Municipal Code or Section5-14001 of the Counties Code may be eligible for additional preferences in State economic development programs, State transportation programs, State planning programs, State natural resources programs, and State agriculture programs.

Section 35. Educational and training programs.

The Department may provide educational and training programs in planning, regulatory, and development practices and techniques that promote and encourage comprehensive planning, including, but not limited to, the use and application of any model ordinances, manuals, and other technical publications prepared by the Department.

The Department may employ or retain not-for-profit entities, regional planning agencies and commissions, and universities to operate or conduct, or assist in the operation or conduct of, the programs.

Section 40. Annual report.

(A) The Department may, at least annually but more often at its discretion, report in writing to the Governor and General Assembly on:

(1) The results and impacts of county and municipal activities funded by the grants authorized by this Act.

(2) The distribution of the grants.

(3) Model ordinances, manuals, and other technical publications prepared by the Department.

(4) Educational and training programs provided by the Department.

(B) The report may also be provided to all counties and municipalities in this State, regional planning agencies and commissions in this State, the Illinois State Library, all public libraries in this State, and to other organizations and libraries upon request at the Department's discretion.

Section 45. Local Planning Fund.

The Department may use moneys, subject to appropriation, in the Local Planning Fund, a special fund created in the State treasury, to implement and administer this Act. If funds are not appropriated, the Department is not required to carry forth the requirements of this Act but may, at its discretion, use funds from other sources.

Section 900. The State Finance Act is amended by adding Section 5.570 as follows

(30 ILCS 105/5.570 new)

Section 5.570. The Local Planning Fund.

Section 999. Effective date.

This Act takes effect upon becoming law.

Passed in the General Assembly May 23, 2002.

Approved August 06, 2002.

Land Resources Management Act (50 ILCS 805/1 et seq.)

50 ILCS 805/1
From Ch. 85, par. 5801
Section 1.

This Act shall be known and may be cited as the Local Land Resource Management Planning Act.

Source: P.A. 84-865.

50 ILCS 805/2
from Ch. 85, par. 5802
Section 2. Findings and purpose.

(A) It is the purpose of this Act to encourage municipalities and counties to protect the land, air, water, natural resources and environment of the State and to encourage the use of such resources in a manner which is socially and economically desirable through the adoption of joint or compatible Local Land Resource Management Plans. The powers granted in this Act are intended to supplement other lawful authority and not to repeal or limit such authority.

(B) When a municipality or a county has acted according to this Act, they are furthering the policy of the State in land resource management. It is the intent of this Act for such units of local government to be immune from liability under federal antitrust laws.

Source: P.A. 84-865.

50 ILCS 805/3
From Ch. 85, par. 5803
Section 3. Definitions.

As used in this Act, the following words and phrases have the following meanings:

(A) "DEPARTMENT" means the Department of Commerce and Community Affairs.

(B) "LOCAL LAND RESOURCE MANAGEMENT PLAN" means a map of existing and generalized proposed land use and a policy statement in the form of words, numbers, illustrations, or other symbols of communication adopted by the municipal and county governing bodies. The Local Land Resource Management Plan may interrelate functional, visual and natural systems and activities relating to the use of land. It shall include but not be limited to sewer and water systems, energy distribution systems, recreational facilities, public safety facilities and their relationship to natural resources, air, water and land quality management or conservation programs within its jurisdiction. Such a plan shall be deemed to be "joint or compatible" when so declared by joint resolution of the affected municipality and county, or when separate plans have been referred to the affected municipality or county for review and suggestions, and such suggestions have been duly considered by the adopting jurisdiction and a reasonable basis for provisions of a plan that are contrary to the suggestions is stated in a resolution of the adopting jurisdiction.

(C) "LAND" means the earth, water and air, above, below or on the surface, and including any improvements or structures customarily regarded as land.

(D) "MUNICIPALITY" means any city, village or incorporated town.

(E) "UNIT OF LOCAL GOVERNMENT" means any county, municipality, township or special district which exercises limited governmental functions or provides services in respect to limited governmental subjects.

Source: P.A. 84-865.

50 ILCS 805/4
From Ch. 85, par. 5804
Section 4. Local Land Resource Management Plans.

A municipality or county, either independently, or jointly or compatibly by intergovernmental agreement pursuant to Section 6, may adopt Local Land Resource Management Plans. Such plans may include goals and procedures for resolving conflicts in relation to the following objectives:

(1) AGRICULTURAL PRESERVATION – to preserve and maintain the productivity of agricultural lands.

(2) AIR AND LAND RESOURCES QUALITY – to ensure that air and land resource quality meet or exceed legally established standards.

(3) ARCHAEOLOGICAL, CULTURAL, AND HISTORIC PLACES – to identify and preserve with integrity archaeological, cultural, and historic places.

(4) AREAS SUBJECT TO NATURAL DISASTERS AND HAZARDS – to identify, document, publicize, and establish the best safe usage for land subject to natural disasters and hazards, including flooding.

(5) ECONOMY OF THE AREA – to create an environment for viable economic activity.

(6) ENERGY CONSERVATION – to provide programs for energy conservation.

(7) FOREST LANDS – to conserve forest lands.

(8) GOVERNMENTAL COOPERATION – to provide opportunity for cooperation with other units of government.

(9) HOUSING – to provide for the housing needs of existing and anticipated residents of the municipality.

(10) NATURAL RESOURCES – to conserve natural resources.

(11) OPEN SPACES – to conserve open spaces.

(12) PUBLIC FACILITIES AND SERVICES – to provide public facilities and services in a healthful and economical manner.

(13) RECREATIONAL NEEDS – to provide recreational space and opportunities.

(14) TRANSPORTATION to encourage safe and efficient public transit and private automobile usage.

(15) URBAN DESIGN – to provide programs for the enhancement of the visual environment.

(16) WATER – to ensure good quality and quantity of water resources.

(17) CITIZEN INVOLVEMENT – to develop a citizen involvement program that ensures the opportunity for citizens to be involved in the preparation of the Local Land Resource Management Plan.

(18) DATA COLLECTION – to develop and maintain data on existing social, economic and physical conditions including analysis of municipal needs, and demographic projections to provide current information for decisions and action.

Source: P.A. 84-865.

50 ILCS 805/5

From Ch. 85, par. 5805

Section 5. Implementation Requirements.

Municipalities or counties that have adopted Local Land Resource Management Plans and that wish to receive planning grants and to use the additional powers and authorities established under this Act shall also adopt:

(1) Implementing ordinances and zoning and subdivision ordinances as authorized by law and by this Act;

(2) A 3 year capital improvement and maintenance program for the jurisdictions considering reasonably anticipated growth and designed to accommodate contiguous development;

(3) A statement of goals which shall be compatible with the local situation of the municipality or county; and

(4) A system and timetable to review and update the plans at least once every 10 years.

In the case of municipalities and counties that have adopted joint or compatible plans, such ordinances and programs shall be parallel and coordinated between the local jurisdictions.

Source: P.A. 84-865.

50 ILCS 805/6

From Ch. 85, par. 5806

Section 6. Intergovernmental Agreements.

A municipality or county may enter into and enforce intergovernmental agreements for joint or compatible planning, local land resource management administration and zoning ordinance enforcement with counties, municipalities and other units of State and local government notwithstanding general statutory limitations concerning county and municipal zoning.

Source: P.A. 84-865.

50 ILCS 805/7
From Ch. 85, par. 5807
Section 7. Implementing Ordinances.

Municipalities and counties acting pursuant to this Act, either independently, jointly or compatibly by intergovernmental agreement pursuant to Section 6, may adopt ordinances to implement Local Land Resource Management Plans.

Source: P.A. 84-865.

50 ILCS 805/8
From Ch. 85, par. 5808
Section 8. Planning Grants.

(A) The Department of Commerce and Community Affairs may make annual grants to counties and municipalities to develop, update, administer and implement Local Land Resource Management Plans, as defined in this Act.

(B) A recipient local government may receive an initial grant to develop a plan after filing a resolution of intent to develop a plan. The plan shall be completed within 18 months of the receipt of the grant.

(C) The amount of the initial grant and the annual grant to be received by the recipient shall be based on the most recent updated U. S. Census at a rate of one dollar per person, but shall not be less than $20,000 and shall not exceed $100,000 per fiscal year.

(D) The Department of Commerce and Community Affairs may promulgate such rules and regulations establishing procedures for determining entitlement and eligible uses of such grants as it deems necessary for the purposes of this Act.

Source: P.A. 84-865.

50 ILCS 805/9
From Ch. 85, par. 5809
Section 9. Resolution of Disputes.

Should a dispute occur between any adversely affected persons or governmental units concerning any part of this Act, the circuit court in which the municipality is located has jurisdiction to determine the reasonableness of the action or inaction complained of.

The court shall take under consideration any evidence of State, county or regional plans, the objectives of this Act, and all relevant facts presented by adversely affected persons, municipalities, State agencies, or units of local government.

Source: P.A. 84-865.

Local Legacy Act
(Public Act 93-0328)
(excerpts)

AN ACT to create the Local Legacy Act.

Be it enacted by the People of the State of Illinois, represented in the General Assembly:

Section 1. Short title.

This Act may be cited as the Local Legacy Act.

Section 5. Policy.

(A) Illinois has a rich natural and cultural heritage. Whether historic sites, natural areas, rich farmland, or other prized resources, every county has treasures worth preserving for future generations.

(B) As counties and municipalities grow, they often do not have the opportunity to consider which resources are most important to them. Consequently, they may inadvertently imperil a historic structure, sever a potential natural corridor, or fragment farmland into small and unsustainable remnants.

(C) It is necessary and desirable to provide technical assistance and funding in the form of grants to encourage partnerships between counties and municipalities for the creation of an inventory of their natural areas, farmland, and cultural assets and to develop a Resource Protection Plan for protecting those areas.

(D) It is the purpose of this Act to promote voluntary county-municipal partnerships in every county by the year 2020 that will inventory resources, develop Resource Protection Plans, and implement their respective plans.

Section 10. Definitions. In this Act:

"BOARD" means the Local Legacy Board created under this Act.

"COMMITTEE" means a Local Steering Committee established under this Act.

"CULTURAL RESOURCE" means a structure, building, district, or site that has aesthetic, architectural, cultural, archeological, or historical significance at the local, state, or national level.

"FARMLAND" means land devoted to agriculture or horticultural uses for the production of food (including grains, fruits, vegetables, dairy products, or mushrooms), fiber, floriculture, or forest products, or the raising of farm animals (including livestock, sheep, swine, horses, ponies, poultry, bees, or fish) or wildlife.

"INVENTORY" means a listing of a county's and its municipalities' natural areas, farmland, and cultural resources.

"NATURAL AREA" means an area of land or water that either retains or has recovered to a substantial degree its original natural or primeval character, though it need not be completely undisturbed, or has floral, faunal, ecological, geological, or archeological features of scientific, educational, recreational, scenic, or aesthetic interest.

"PROGRAM" means the Local Legacy Program.

"RESOURCE", unless otherwise specified, means farmland, a natural area, or a cultural resource.

"RESOURCE PROTECTION PLAN" means an integrated document that includes goals, policies, strategies, and procedures for preserving key farmland, natural areas, and cultural resources identified in a countywide inventory and adopted as provided in Section 30 of this Act.

Section 15. The Local Legacy Board.

The Local Legacy Board is created to administer the Program under this Act. The membership of the Board shall be composed of the Director of Natural Resources, the Director of Historic Preservation, and the Director of Agriculture, or their respective designees. The Board must choose a Chairperson to serve for 2 years on a rotating basis. All members must be present for the Board to conduct official business. The Departments must each furnish technical support to the Board.

The Board has those powers necessary to carry out the purposes of this Act, including, without limitation, the power to:

(1) employ agents and employees necessary to carry out the purposes of this Act and fix their compensation, benefits, terms, and conditions of employment;

(2) adopt, alter and use a corporate seal;

(3) have an audit made of the accounts of any grantee or any person or entity that receives funding under this Act;

(4) enforce the terms of any grant made under this Act, whether in law or equity, or by any other legal means;

(5) prepare and submit a budget and request for appropriations for the necessary and contingent operating expenses of the Board; and

(6) receive and accept, from any source, aid or contributions of money, property, labor, or other items of value for furtherance of any of its purposes, subject to any conditions not inconsistent with this Act or with the laws of this State pertaining to those contributions, including, but not limited to, gifts, guarantees, or grants from any department, agency, or instrumentality of the United States of America. The Board must adopt any rules, regulations, guidelines, and directives necessary to implement the Act, including guidelines for designing inventories so that they will be compatible with each other.

The Board must submit a report to the General Assembly and the Governor by January 1, 2005 and every 2 years thereafter regarding progress made towards accomplishing the purposes of this Act.

Section 20. Local Legacy Program.

The Local Legacy Program is created. The Board shall determine the eligibility of county-municipal partnerships for funding under the Program. The purpose of the Program is to provide grants to counties and municipalities to (i) inventory their natural areas, farmland, and cultural resources; and (ii) develop Resource Protection Plans.

Section 30. Duties of the Local Steering Committee.

The Local Steering Committee shall have the authority to apply for and receive grants to conduct an inventory and develop a Resource Protection Plan and to review all grant applications from units of local government before they are submitted to the Board.

The Local Steering Committee shall develop a strategy for conducting an inventory of natural areas, farmland, and cultural resources. The Committee shall determine which resources should be included in the inventory, the amount of financial and technical assistance needed from the State, what information is already available, who will conduct the inventory, how municipal and county efforts should be coordinated, and how to present the information so that it is compatible with inventories conducted by other county-municipal partnerships.

The Committee shall use the inventory as the basis for developing its Resource Protection Plan. Working with a professional planner or other resource specialist, the Committee shall develop criteria for prioritizing resources identified by the inventory. When prioritizing resources, the Committee shall analyze the threat to the resources using population projections, land use patterns, and development trends. Upon the approval of two-thirds of its members, with at least one member from each of the 3 categories voting in approval, the Committee shall recommend that the county board and the municipalities within the county adopt the Resource Protection Plan. Amendments to the Resource Protection Plan must be approved in the same manner. A local government may object to all or part of the Resource Protection Plan in writing. If a written objection is filed with the Committee, the portion of the Plan objected to shall not be effective within that local government's borders. The objecting local government may modify or withdraw its objection at any time.

Affordable Housing Planning and Appeal Act

310 ILCS 67/1

Section 1. Short title.

This Act may be cited as the Affordable Housing Planning and Appeal Act.

310 ILCS 67/5

Section 5. Findings.

The legislature finds and declares that:

(1) there exists a shortage of affordable, accessible, safe, and sanitary housing in the State;

(2) it is imperative that action be taken to assure the availability of workforce and retirement housing; and

(3) local governments in the State that do not have sufficient affordable housing are encouraged to assist in providing affordable housing opportunities to assure the health, safety, and welfare of all citizens of the State.

310 ILCS 67/10

Section 10. Purpose.

The purpose of this Act is to encourage counties and municipalities to incorporate affordable housing within their housing stock sufficient to meet the needs of their county or community. Further, affordable housing developers who believe that they have been unfairly treated due to the fact that the development contains affordable housing may seek relief from local ordinances and regulations that may inhibit the construction of affordable housing needed to serve low-income and moderate-income households in this State.

310 ILCS 67/15

Section 15. Definitions. As used in this Act:

"AFFORDABLE HOUSING" means housing that has a sales price or rental amount that is within the means of a household that may occupy moderate-income or low-income housing. In the case of dwelling units for sale, housing that is affordable means housing in which mortgage, amortization, taxes, insurance, and condominium or association fees, if any, constitute no more than 30 percent of the gross annual household income for a household of the size that may occupy the unit. In the case of dwelling units for rent, housing that is affordable means housing for which the rent and utilities constitute no more than 30 percent of the gross annual household income for a household of the size that may occupy the unit.

"AFFORDABLE HOUSING DEVELOPER" means a nonprofit entity, limited equity cooperative or public agency, or private individual, firm, corporation, or other entity seeking to build an affordable housing development.

"AFFORDABLE HOUSING DEVELOPMENT" means (i) any housing that is subsidized by the federal or State government or (ii) any housing in which at least 20% of the dwelling units are subject to covenants or restrictions that require that the dwelling units be sold or rented at prices that preserve them as affordable housing for a period of at least 15 years, in the case of for-sale housing, and at least 30 years, in the case of rental housing.

"APPROVING AUTHORITY" means the governing body of the county or municipality.

"AREA MEDIAN HOUSEHOLD INCOME" means the median household income adjusted for family size for applicable income limit areas as determined annually by the federal Department of Housing and Urban Development under Section 8 of the United States Housing Act of 1937.

"DEVELOPMENT" means any building, construction, renovation, or excavation or any material change in the use or appearance of any structure or in the land itself; the division of land into parcels; or any change in the intensity or use of land, such as an increase in the number of dwelling units in a structure or a change to a commercial use.

"EXEMPT LOCAL GOVERNMENT" means any local government in which at least 10% of its total year-round housing units are affordable, as determined by the Illinois Housing Development Authority pursuant to Section 20 of this Act; or any municipality under 1,000 population.

"HOUSEHOLD" means the person or persons occupying a dwelling unit.

"LOCAL GOVERNMENT" means a county or municipality.

"LOW-INCOME HOUSING" means housing that is affordable, according to the federal Department of Housing and Urban Development, for either home ownership or rental, and that is occupied, reserved, or marketed for occupancy by households with a gross household income that does not exceed 50 percent of the area median household income.

"MODERATE-INCOME HOUSING" means housing that is affordable, according to the federal Department of Housing and Urban Development, for either home ownership or rental, and that is occupied, reserved, or marketed for occupancy by households with a gross household income that is greater than 50 percent but does not exceed 80 percent of the area median household income.

"NON-APPEALABLE LOCAL GOVERNMENT REQUIREMENTS" means all essential requirements that protect the public health and safety, including any local building, electrical, fire, or plumbing code requirements or those requirements that are critical to the protection or preservation of the environment.

310 ILCS 67/20

Section 20. Determination of exempt local governments.

(A) Beginning October 1, 2004, the Illinois Housing Development Authority shall determine which local governments are exempt and not exempt from the operation of this Act based on an identification of the total number of year-round housing units in the most recent decennial census for each local government within the State and by an inventory of for-sale and rental affordable housing units, as defined in this Act, for each local government from the decennial census and other relevant sources.

(B) The Illinois Housing Development Authority shall make this determination by:

(i) totaling the number of for-sale housing units in each local government that are affordable to households with a gross household income that is less than 80% of the median household income within the county or primary metropolitan statistical area;

(ii) totaling the number of rental units in each local government that are affordable to households with a gross household income that is less than 60% of the median household income within the county or primary metropolitan statistical area;

(iii) adding the number of for-sale and rental units for each local government from items (i) and (ii); and

(iv) dividing the sum of (iii) above by the total number of year-round housing units in the local government as contained in the latest decennial census and multiplying the result by 100 to determine the percentage of affordable housing units within the jurisdiction of the local government.

(C) Beginning October 1, 2004, the Illinois Housing Development Authority shall publish on an annual basis a list of exempt and non-exempt local governments and the data that it used to calculate its determination. The data shall be shown for each local government in the State and for the State as a whole. Upon publishing a list of exempt and non-exempt local governments, the Illinois Housing Development Authority shall notify a local government that it is not exempt from the operation of this Act and provide to it the data used to calculate its determination.

(D) A local government or developer of affordable housing may appeal the determination of the Illinois Housing Development Authority as to whether the local government is exempt or non-exempt under this Act in connection with an appeal under Section 30 of this Act.

310 ILCS 67/25
Section 25. Affordable housing plan.

(A) Prior to April 1, 2005, all non-exempt local governments must approve an affordable housing plan.

(B) For the purposes of this Act, the affordable housing plan shall consist of at least the following:

(i) a statement of the total number of affordable housing units that are necessary to exempt the local government from the operation of this Act as defined in Section 15 and Section 20;

(ii) an identification of lands within the jurisdiction that are most appropriate for the construction of affordable housing and of existing structures most appropriate for conversion to, or rehabilitation for, affordable housing, including a consideration of lands and structures of developers who have expressed a commitment to provide affordable housing and lands and structures that are publicly or semi-publicly owned;

(iii) incentives that local governments may provide for the purpose of attracting affordable housing to their jurisdiction; and

(iv) a goal of a minimum of 15% of all new development or redevelopment within the local government that would be defined as affordable housing in this Act; or a minimum of a 3 percentage point increase in the overall percentage of affordable housing within its jurisdiction, as described in subsection (b) of Section 20 of this Act; or a minimum of a total of 10% affordable housing within its jurisdiction as described in subsection (b) of Section 20 of this Act.

(C) Within 60 days after the adoption of an affordable housing plan or revisions to its affordable housing plan, the local government must submit a copy of that plan to the Illinois Housing Development Authority.

310 ILCS 67/30
Section 30. Appeal to State Housing Appeals Board.

(A) Beginning January 1, 2006, an affordable housing developer whose application is either denied or approved with conditions that in his or her judgment render the provision of affordable housing infeasible may, within 45 days after the decision, submit to the State Housing Appeals Board information regarding why the developer believes he or she was unfairly denied or conditions were placed upon the tentative approval of the development unless the local government that rendered the decision is exempt under Section 15 or Section 20 of this Act. The Board shall maintain all information forwarded to them by developers and shall compile and make available an annual report summarizing the information thus received.

(B) Beginning January 1, 2009, an affordable housing developer whose application is either denied or approved with conditions that in his or her judgment render the provision of affordable housing infeasible may, within 45 days after the decision, appeal to the State Housing Appeals Board challenging that decision unless the municipality or county that rendered the decision is exempt under Section 15 of this Act. The developer must submit information regarding why the developer believes he or she was unfairly denied or unreasonable con-

ditions were placed upon the tentative approval of the development.

(C) Beginning January 1, 2009, the Board shall render a decision on the appeal within 120 days after the appeal is filed. In its determination of an appeal, the Board shall conduct a de novo review of the matter. In rendering its decision, the Board shall consider the facts and whether the developer was treated in a manner that places an undue burden on the development due to the fact that the development contains affordable housing as defined in this Act. The Board shall further consider any action taken by the unit of local government in regards to granting waivers or variances that would have the effect of creating or prohibiting the economic viability of the development. In any proceeding before the Board, the developer bears the burden of demonstrating that he or she has been unfairly denied or unreasonable conditions have been placed upon the tentative approval for the application for an affordable housing development.

(D) The Board shall dismiss any appeal if:

(i) the local government has adopted an affordable housing plan as defined in Section 25 of this Act and submitted that plan to the Illinois Housing Development Authority within the time frame required by this Act; and

(ii) the local government has implemented its affordable housing plan and has met its goal as established in its affordable housing plan as defined in Section 25 of this Act.

(E) The Board shall dismiss any appeal if the reason for denying the application or placing conditions upon the approval is a non-appealable local government requirement under Section 15 of this Act.

(F) The Board may affirm, reverse, or modify the conditions of, or add conditions to, a decision made by the approving authority. The decision of the Board constitutes an order directed to the approving authority and is binding on the local government.

(G) The appellate court has the exclusive jurisdiction to review decisions of the Board.

310 ILCS 67/40

Section 40. Nonresidential development as part of an affordable housing development.

(A) An affordable housing developer who applies to develop property that contains nonresidential uses in a nonresidential zoning district must designate either at least 50 percent of the area or at least 50 percent of the square footage of the development for residential use. Unless adjacent to a residential development, the nonresidential zoning district shall not include property zoned industrial. The applicant bears the burden of proof of demonstrating that the purposes of a nonresidential zoning district will not be impaired by the construction of housing in the zoning district and that the public health and safety of the residents of the affordable housing will not be adversely affected by nonresidential uses either in existence or permitted in that zoning district. The development should be completed simultaneously to the extent possible and shall be unified in design.

(B) For purposes of subsection (a), the square footage of the residential portion of the development shall be measured by the interior floor area of dwelling units, excluding that portion that is unheated. Square footage of the nonresidential portion shall be calculated according to the gross leasable area.

310 ILCS 67/50

Section 50. Housing Appeals Board.

(A) Prior to July 1, 2006, a Housing Appeals Board shall be created consisting of 7 members appointed by the Governor as follows:

(1) a retired circuit judge or retired appellate judge, who shall act as chairperson;

(2) a zoning board of appeals member;

(3) a planning board member;

(4) a mayor or municipal council or board member;

(5) a county board member;

(6) an affordable housing developer; and

(7) an affordable housing advocate.

In addition, the Chairman of the Illinois Housing Development Authority, ex officio, shall serve as a non-voting member. No more than 4 of the appointed members may be from the same politi-

cal party. Appointments under items (2), (3), and (4) shall be from local governments that are not exempt under this Act.

(B) Initial terms of 4 members designated by the Governor shall be for 2 years. Initial terms of 3 members designated by the Governor shall be for one year. Thereafter, members shall be appointed for terms of 2 years. A member shall receive no compensation for his or her services, but shall be reimbursed by the State for all reasonable expenses actually and necessarily incurred in the performance of his or her official duties. The board shall hear all petitions for review filed under this Act and shall conduct all hearings in accordance with the rules and regulations established by the chairperson. The Illinois Housing Development Authority shall provide space and clerical and other assistance that the Board may require.

(C) The Illinois Housing Development Authority may adopt such other rules and regulations as it deems necessary and appropriate to carry out the Board's responsibilities under this Act and to provide direction to local governments and affordable housing developers.

APPENDIX D: HOW TO FIND CONSULTANTS

If an agency (or municipality) decides to hire a consultant, it must develop a list of consultants from which to choose. This list can be developed by searching a number of sources: personal referrals; professional directories; award winners identified through professional organizations; news items in newsletters, newspapers and magazines; consultant calling cards; consulting firm brochures; and, as a last resort, the telephone directory.

Some agencies (or municipalities) use a more formal procedure for establishing the list of available consultants. These agencies (or municipalities) maintain and periodically update a list of consultants developed from procedures involving responses to requests for qualifications (RFQs). Consultants who want to be placed on the list may apply for consideration. If there are special projects that must be done for which only a few qualified consultants are listed, the agency can add to the list by using the techniques outlined below. Maintaining a formal pool is particularly useful for a large community or for any other agency that may use consultants relatively frequently. In order to make this preselected list of consultants most useful, it can be divided into specialty groups. Many consulting firms have expertise in a number of fields. Consequently, an agency that lists consultants under functional categories should cross-tabulate these consultants in all the categories in which they have expertise, a process easily accomplished with a database program.

The following information could be solicited and filed for each firm:

1. Name, address, and telephone number
2. Types of services for which the firm is qualified
3. Year the firm was established, as well as former firm names
4. Names of principals and key personnel and their experience and qualifications
5. Size of staff
6. An illustrative list of recent projects completed for purposes of referral

Organize for Selection

1. Define the task

Perhaps the most important step an agency must take before initiating the consultant selection process is defining the problem, task or project requiring consulting services. There are, of course, circumstances in which the agency has difficulty in defining the problem, in which case it should consider retaining a consultant for that purpose. In defining the task, factors to be considered include:

- precise goals of the project;
- technical, political and administrative parameters;
- division of labor between agency personnel and consultant;
- desired product;
- timetable for completion;
- total project budget; and
- expected problems and constraints.

Developing a good definition of the task is difficult. If the task definition is too specific, it may limit the creativity of the consultant. If the definition is too general, it may result in the consultant producing something that constitutes satisfactory professional work but that does not resolve the problem. If the hiring agency is uncertain how to define the task, it can provide a background description of the problem or issue as context for the RFQ or Request for Proposal (RFP) processes.

2. Define the roles

Defining the respective roles of consultants and staff is also important. In many cases, the community already has much of the data that will be necessary to complete a project. In other cases, little or no reliable data exists. Gathering data is expensive. Thus, a clear definition of what data the planning agency can provide from its own files or from other local departments and entities is very important in helping the consultant define the tasks. It is also important to define the level of support and review that local staff will provide for the project.

This material is a revised and edited excerpt from Selecting and Retaining a Planning Consultant: RFPs, RFQs, Contracts, and Project Management by Eric Damian Kelly, AICP. It is Planning Advisory Service Report No. 443, published by the American Planning Association, February 1993. It is used by permission.

APPENDIX E: WHAT TO INCLUDE IN A REQUEST FOR PROPOSAL (RFP)

A Request for Proposal (RFP) may be accompanied by appendices, maps, drawings, and other backup material. However, the RFP itself should be a relatively brief document. Even on a rather large or complex project, the various elements can generally be covered in 10 to 25 single-spaced pages.

(1) Cover Sheet

A lengthy RFP should have a cover sheet giving the RFP title, project or program title, name of the issuing entity, and date the proposal is due.

(2) Introduction

The introduction should identify and describe, in no more than one paragraph, the project or program for which the consultant is required and its current status. It should then state briefly the nature of the consulting assistance being sought. This should be carefully worded. If the job requires an interdisciplinary team, it is best to talk about the end product or type of activity (e.g., an environmental impact assessment or a development plan), rather than a specific type of firm. Your preferences about the type of firm can be better explained later, in the qualifications section. The introduction should state the amount budgeted for the proposed work. Finally, the due date for the proposal should be included in the introduction, with a reference to the directions for submission that will be described later in the RFP.

Describe the issuing agency and its relationship to other entities if that is not obvious. This suggestion is not necessary for a planning department that is clearly a line agency within a municipal government. However, it can be very important for intergovernmental agencies and other entities. Names of public authorities and special districts, such as sewer districts, can be particularly misleading. Such an entity is often named after a city, town or county with which the agency may or may not be coterminous. The difference should be pointed out, though it need not be explained in detail in the introduction.

(3) Description of the Project or Program

This section should establish the context for the work to be performed and help the consultant judge the level of effort required for various tasks. If the project or program is very complex, the details can be relegated to an appendix or other attachments. The important points to cover here are:

- the purpose of the project or program (what it is supposed to accomplish and for whom);
- its basic components – management, structure, processes, and personnel;
- any innovative or unusual aspects;
- the site(s) or geographic area(s) involved; and
- a proposed schedule and present status of the project or program.

(4) Description of Services Required

This is the heart of the RFP. Take great care with it because this is the section the consultants will read again and again, weighing its every nuance. If carelessly written, this section can defeat the purpose of the RFP by misstating the agency's needs or by conveying inaccurate signals about how the proposals will be evaluated.

Write clearly. Avoid jargon. Use commonly understood terms, rather than acronyms or abbreviations. Do not use general terms like "facilities" if you mean "roads."

Emphasize what the agency needs from the consultant. Although the RFP certainly should identify any critical or mandatory steps in the process, such as public meetings, the proposal process often works best if it leaves the work program open to suggestions from proposing consultants. Unless the purpose for hiring the consultant is simply to augment staff on a project, the same expertise that the consultant brings to the substantive aspects of the project should enable the consultant to develop a responsive work program. There are two reasons for encouraging consultants to do so. First, if the consultant has significant experience with the type of work involved, the consultant's personnel should know more about what should be in such a work program than the agency staff. Second, evaluating independently developed work programs is an excellent way to evaluate a consultant's understanding of the project and approach to the project, as well as the quality of the consultant's work.

This section also should provide a schedule for the completion of the project that identifies major project milestones. If there is a particular number of public meetings involved in the project or if the goal is to have a report or plan ready for a meeting that already has been

scheduled, that information should be included in this section of the RFP.

(5) Budget

Most agencies do not include budget information in an RFP. The theory is that consultants who know what the budget is will automatically submit proposals that "spend the budget." That may be a legitimate concern. On the other hand, a consultant with no idea of the budget for a proposed project may have great difficulty in submitting a responsive proposal. Where an agency fails to specify a budget, cost proposals may range up to a high of four or five times the lowest-cost proposal. In those circumstances, there may be only one or two proposals that are within the project budget of the local government and thus only one or two proposals from which to choose. A proposal that falls far below the anticipated budget probably will include far less in the way of services than the agency wants or needs. It is very difficult to compare proposals with extreme variations in budget because there are too many variables. If two qualified firms offer exactly the same range of services at significantly different prices, the agency has something to compare. If two qualified firms offer vastly different scopes of services at the same price, the agency can select the scope of services that best suits its needs. However, when there is little in common among proposals from qualified firms, comparison is difficult, indeed.

There are few disadvantages to sharing budget information. The agency that publishes the budget can still rank proposals competitively based on which qualified consultant will provide the best value – the most appropriate package of services within the agency's budget. If an agency's expectations of services far exceed its proposed budget, it is easier on all parties if consultants are aware of that discrepancy initially and can inform the agency of that fact without putting the consultants or the agency through the demanding process of preparing and reviewing proposals. If an agency's budget exceeds its expectations (a very rare circumstance), one or more reputable firms will bid less than the budget or offer a range of additional and perhaps unneeded services. The agency can then select one of the lower-priced proposals or negotiate a reduced contract for less than the full scope of services proposed by the selected firm.

An agency can maintain some price competition in the process and still provide guidance to consultants by publishing a budget range. However, the real issue in selecting a consultant is not price but value. If every consultant competing for a proposed project submits a budget for the same amount, the agency can easily compare the proposals to determine which offers the best value. That is a far more practical exercise than attempting to compare diverse proposals with vastly different budgets, hoping to renegotiate one of the proposals to the appropriate level of services for the budget.

(6) Type of Contract

Indicate what type of contractual arrangement the agency will use. Professional services contracts generally fall into one of two categories: fixed-price (also called lump sum), in which the agency receives a defined scope of services for a fixed price; and time-and-expense (also called cost-plus), in which the agency reimburses a consultant on a fixed formula for professional time and expenses.

(7) Qualifications

An agency that uses the two-part, Request for Qualifications (RFQ)/RFP process will have most of the information about qualifications that it needs from the RFQs. At the RFP stage, it should ask for an update to the RFQ if there has been a significant lapse of time between the two. The agency also will want one additional set of information. The proposal should specify what personnel will work on the project. It also should include short resumes on those specific individuals, if those resumes were not included in the RFQ.

An agency that goes directly to the RFP stage should include a full request for qualifications as part of the proposal. That should include the same information suggested in Appendix B for a statement of qualifications, plus the specific qualifications of any personnel to be assigned to the project.

The RFP need not be very specific when requesting information on consultant qualifications. A firm that submits a standard brochure unrelated to the proposed project without other information probably will not

give the project the attention that it needs and does not deserve serious consideration.

(8) Evaluation Criteria

Explain how the proposals will be evaluated and, in general terms, by whom. It is helpful to both parties if the consultants know how much weight will be given to specific aspects of their proposals, such as cost, technical approach, relevant experience, qualifications of the project team, familiarity with the geographic area, and logistical capabilities. It also is useful to let the consultants know what type of group will review the proposals. A consultant may prepare a proposal in one way if the planning commission is to make the selection and in a very different way if technical experts from the staff will make the selection. Some consultants probably will learn who is on the selection team. Disclosing that information in the RFP keeps the process fair to all. If state law or local rule prohibits the consultants from contacting selection team members directly, the RFP should say so and selection team members should be clearly instructed to turn away (and probably report) any attempted contacts from consultants. Planning consultants typically do not attempt to lobby selection committee members, but some do. If there are rules on the subject, they should be stated clearly.

(9) Directions for Submission

The RFP should include a simple statement of the time (date and hour) and place for submission of the proposal and the number of copies required. Since proposals are often delivered by messenger or overnight delivery service, give a street address (with office number), as well as the agency's mailing address. If there are sealed-bid requirements or if cost proposals should be submitted separately, those directions should be contained in this section.

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APPENDIX F: GLOSSARY

Cluster development
Arrangement of development on one part of a site to save open space in the remainder of the site.

Density
How the activity of land use is gauged. Density is the number of dwelling units on a housing site divided by the area of the site.

Green architecture/infrastructure, greenways
Tracts of land that connect one preserved area to another, often including a hiking or bicycling trail.

Growth management
Tools and techniques for implementing coordinated planning and sensible growth. *(See sensible growth)*

Intensity
Any ratio that assesses the level of activity of land use – most typically a floor-area ratio, the ratio of total floor area of the use to the total area of the lot/parcel.

Level of service
Many transportation plans include goals for the desired level of service of major roads in a community, and monitor levels of service through a program of traffic counting and observations. The following is a description of level of service (LOS) categories, which apply to vehicular traffic:

LOS A: Free-flowing traffic.

LOS B: Stable flow, but the presence of other traffic users becomes noticeable.

LOS C: Stable flow, but the presence of other traffic significantly affects other users.

LOS D: Speed and freedom to maneuver are severely restricted.

LOS E: Operating conditions at or near capacity.

LOS F: Traffic flow severely restricted, stop-and-go traffic.

New Urbanism
Design concepts that use traditional neighborhood and transit-oriented features to lay out neighborhoods and communities. *(See transit-oriented development)*

Planned unit development
Zoning for phasing relatively large developments, which usually allows several uses and some flexibility in designing a site to make the best use of the property.

Sensible growth
Broad principles or goals for guiding community development toward quality growth, such as emphasizing infill and redevelopment, protecting natural resources, and linking transportation and land use.

Smart growth
Another term for sensible growth.

Standard planning and zoning
Traditional or conventional planning and zoning, in use primarily since 1945, that separates uses (such as residential, retail and commercial) from one another and does not emphasize infill, protection of natural resources, or linkages between transportation and land use.

Sustainable development
Development that enhances people's well being within the environment's capacity, meeting the needs of the present without compromising the ability of future generations to meet their needs.

Traditional neighborhood development
Neighborhood designs that include features of typical pre-1940s development, such as mixed-uses, pedestrian-friendly streets, and homes with front porches.

Transit-oriented development
Development focused around transit stations that is designed to improve transit use and neighborhood walkability.

Watershed
The land area that directly drains to a common stream, river or lake

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S.B. Friedman & Company provides development advisory services to create public-private partnerships; developer solicitation; development strategies for downtowns and transit-oriented developments; tax increment financing; deal structuring and review; real estate market analysis; economic feasibility studies; special service areas; fiscal impact analysis; and implementation.

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Valerie S. Kretchmer Associates, Inc., provides planning and real estate consulting services, including market feasibility studies for residential, retail, office, mixed-use, and industrial properties; economic development strategies; downtown, neighborhood and commercial corridor planning; transit-oriented development planning; demographic and economic analysis; and consumer research and surveys.

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Matanky Realty Group is a full service real estate company offering expertise in brokerage, land acquisition, development, redevelopment, renovation, new construction, and leasing. MRG has served the Chicago metropolitan area for over half a century, concentrating on Chicago's neighborhoods with a unique understanding of each property and its environs.

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Teska Associates, Inc., provides community planning and landscape architecture services throughout the Midwest region.