



MEMORANDUM

To: CMAP Board

From: Bob Dean
Deputy Executive Director for Planning

Date: April 5, 2017

Re: Local Technical Assistance (LTA) Program Implementation Funding

At the March Board meeting, staff reviewed a [memo](#) discussing the implementation of completed LTA projects. The memo made several recommendations on this topic, restated below:

Based on committee feedback and internal staff discussions, staff recommends beginning to devote small amounts of funding to assist with implementation of completed LTA projects. To try this idea as a pilot, staff recommends setting aside \$50,000 of the funding available for new LTA contracts in FY18. Each individual grant will be in the range of approximately \$5,000 to \$10,000.

Rather than doing a formal call for implementation ideas, staff proposes to evaluate funding opportunities as they arise. Proposals will be evaluated according to several criteria: consistency with the adopted plan and with GO TO 2040; demonstrated local commitment (including local match or non-monetary commitment); community need; feasibility of the proposed activity and likelihood of success; eligibility of the proposed activity within the restrictions of CMAP's funding sources; and size of funding request.

Board members asked several questions concerning examples of project types and the process for soliciting and selecting implementation investments. This memo provides staff recommendations on these matters.

Project types

Staff expects two major categories of expenditures:

1. Implementation of staff-led projects sometimes requires specific expertise beyond what CMAP staff can offer. Examples – which are not meant to be exhaustive – include:

- A municipality begins working on a capital improvement plan (CIP) in response to a recommendation in their comprehensive plan. The municipality wants to involve their village engineer (a firm working on contract) in the process. The municipality asks CMAP to cover a portion of the cost (perhaps \$5,000) of the engineer's involvement.
 - A community wants to better understand feasibility of transit-oriented development on a key site. CMAP has a standing contract with the Urban Land Institute (ULI) to bring the perspective of private real estate developers to the planning process. In this case, CMAP would contract with ULI to schedule a half-day Developer Panel in the community, at a cost of \$3,000 to \$5,000, which would yield advice from real estate professionals on how to attract the desired development.
 - Following adoption of a corridor plan, a municipality wants to further explore pedestrian crossing alternatives at the intersection of two arterials. The municipality enters into a contract with a nonprofit organization to conduct a walkability audit of the area to develop more specific ideas for improvements. The municipality asks CMAP to cover a portion (perhaps \$2,000) of the cost.
2. For plans written by consulting firms, CMAP could enter into follow-on contracts to keep the firms involved in implementation. Approximately one-third of LTA projects are contracted to consulting firms. In these cases, the firms develop a strong community understanding and local connections. However, once plans are adopted, the contracts end and the firms need to move on to other clients. CMAP has found that small-scale follow-ups – attending Plan Commission meetings to keep attention focused on the plan, advising staff on implementation priorities, and simply calling the community quarterly to ask about implementation progress – are effective in advancing implementation. Other activities, like suggesting grant opportunities, researching new program ideas, or making connections to other public agencies or nonprofit groups, also help. Any of these activities can be done by CMAP staff, but in some cases, consulting firms have stronger relationships and better local knowledge and can deliver these services more effectively. Practically, this approach would extend contracts with consulting firms for some consultant-led plans for a year or two after adoption, with not-to-exceed annual amounts of \$5,000 to \$10,000.

There are other types of investments that may be locally desired but are not a good fit for this funding. For example, capital expenditures, even very minor ones (like striping bicycle lanes or installing signage) should not be covered. Financial support for local staff should also not be included in the program.

Solicitation and selection process

While some implementation ideas can be generated during the annual call for projects, others will be opportunistic, or too small-scale to justify requiring a full application. Staff proposes to proactively identify opportunities, as well as respond to community requests as they are received. Currently, CMAP follows up with project sponsors regularly (quarterly for recently completed projects, and annually for others) to track implementation progress. These updates can be used to identify unmet implementation needs and also gauge implementation

commitment. The annual update occurs in July, and staff can use that opportunity to inform the sponsors of all completed projects of the availability of implementation funding.

Staff recommends using several criteria for choosing investments to make:

- Consistency with the adopted plan, GO TO 2040, and emerging priorities of ON TO 2050. Obviously, requests must be consistent with the adopted plan and with CMAP's overall priorities.
- Feasibility of the proposed activity and likelihood of success. Requests that are unlikely to end in an implementable activity (for example, requesting real estate developer review of a site where the comprehensive plan found little immediate demand) should not be considered.
- Innovation. Activities that build CMAP's base of knowledge should be prioritized over those that do not.
- Size of funding request. A maximum of \$10,000 is proposed for any particular implementation expenditure.
- Eligibility of the proposed activity within the restrictions of CMAP's funding sources. Each funding source has restrictions that govern its use. Suitable funding will need to be identified for any implementation activity.
- Community need. This program is small and unlikely to influence implementation success in communities with their own resources to spend. Most of the funding should be reserved for high-need communities that would not otherwise be able to take on this work.
- Demonstrated local commitment (including local match or non-monetary commitment). Projects where CMAP funding makes up a fraction of cost – ideally, less than half – should be most strongly considered. This may not apply for some activities where CMAP already holds a contract, like the Developer Panels offered by ULI. For some communities with very high need, CMAP may make up a larger share of the project cost, but the community should be able to demonstrate interest through other means like commitment of staff time and volunteers to implementation.

ACTION REQUESTED: Discussion

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