



CITY OF GREELEY

MASTER PLAN PROCEDURES / PREPARATION GUIDE

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1. EXECUTIVE SUMMARY

WHY THIS GUIDE?

The City of Greeley developed this **Master Plan Guide** to provide a consistent and uniform framework for all City departments to follow as they prepare their individual master plans. It was initiated in response to a third-party review of various City of Greeley Master Plans, which found that there was a lack of consistency in content and format across the various master plans. This guide therefore seeks to standardize not only the master plan document, but also the master planning process.

Establishing a common master planning framework will assist **stakeholders** and the public to understand master plan documents easily, and help streamline the review process that **Boards** and Commissions oversee as well as the final adoption process by City Council. This guide outlines the initial steps to getting a master plan started, identifies critical components each plan should include, and provides general guidance on the format of the plan document. Finally, the guide provides direction on how to coordinate between departments and integrate common goals.

GUIDE ELEMENTS

- **Project Development-** The early pages of the guide provide information on getting the right cost estimate, developing a **scope** of work, and finally contracting the work. These steps are primarily focused on plans that are using the assistance of a consultant, but can also be applied to internal master plans.
- **Project Management-** Initiating the master plan is the next critical step and can set the stage for the rest of the planning effort, which often takes 12-18 months. The guide provides insight into how to structure the plan kick-off to help **project managers** identify strengths, weaknesses, opportunities and threats early on in the planning process, which helps prevent delays and changes to the **scope**.
- **Public Engagement-** One of the most important parts of a plan is the public engagement process. Guidance for how and when to engage the community and **stakeholders**, as well as how to include this information in the plan is detailed on page 10 of the guide.
- **Document Production-** The plan document is a reflection of the planning process and is developed concurrently. Special attention should be paid to the layout, format, and content of the plan and expectations should be set early in the process.
- **Project Outcomes-** All master plans should have goals and objectives that can be tracked and measured. The plan should also develop a list of projects/action items that are organized by timeframe or priority level.

Introduction

A **master plan** is a planning document that shows the vision of the community in the next 5 to 20 years or more. The vision can be on a large scale such as the entire city or smaller scale like neighborhood design or, a park design. Master planning is about connecting and harmonizing buildings, roads, parks, utilities, social settings, other community assets, and their surrounding environments.

For example, in 2018, the City engaged the public in a campaign to collect input and feedback from the community on issues and opportunities facing the community, especially key **policy** choices, goals and objectives. The process resulted in an opportunity for community members to strategize what they envision for the next 20-years, those implementation actions are included in the **Imagine Greeley Comprehensive Plan**.

The benefits of having a plan include:

- **Consistency in decision making:** Master plans give decision-makers a steady point of reference for taking action.
- **Ability to make informed decisions:** Master plans provide facts on existing conditions and trends, enabling decision-makers to understand the impact of their decisions better.
- **Achieve predictability:** Master plans describe where and what type of development the community desires through the **Imagine Greeley Comprehensive Plan**. This information, in turn, allows each City department to understand the **zoning**, purchase, land, utility infrastructure, and multi-modal transportation networks such trails, roads, and bicycle lanes that are consistent with the **Imagine Greeley Comprehensive Plan**.
- **Wise use of resources:** Master plans include information from different departments, **stakeholders**, and other sources. Each departments goals and objectives are different, but the information gained can be used in deciding and prioritizing which projects to take on first (such as promoting redevelopment in older disinvested sites, buying land for parks, or applying for grants for affordable housing, and so forth). It also can be used to direct the location of utility extensions and road improvements.
- **Preserving community character:** Master plans describe the city's vision for the future, but also beyond the fringe of jurisdictional boundaries such as the **Long Range Expected Growth area (LREGA)**. It allows the residents to identify what is essential for their community and neighborhood, and how it should be managed and protected.
- **Produce positive economic development:** Planning for a community helps existing residences and businesses better predict the future development of an area. This prediction helps community members know what to expect on neighboring properties. It also encourages new businesses and residential developments know what to expect for their community. The planning process allows a residents to consider workforce, education, and local infrastructure capacity, among other factors, so appropriate economic development strategies can be developed in their community and neighborhoods

2. STARTING THE PROCESS

Master plans help refine department priorities based on the wants and needs of the community, which is why regular master plan updates are needed to reflect possible changes to community priorities, development patterns, population growth, demographic and social changes, technological advances, or a shift in City priorities. Key departments such as Water and Sewer, Public Works, and Community Development should update their master plans every 5-10 years. In some cases, state or federal mandates will require master plans ahead of that timeline.

COST ESTIMATE AND FUNDING

Once a department has identified the need for a master plan, funding for the project must be secured. However, before funding can be allocated it helps to have a reliable cost estimate. If no comparable cost estimates are available, a good place to start is to release a **Request for Information (RFI)** solicitation. An **RFI** solicits information from consultants based on a general description and goals for a project. For example, if Public Works intends on developing a Parking



Figure 1.0: Greeley Entry Corridor Sign

Master Plan, but doesn't know how much that would cost, they would release an **RFI** that contains the preliminary plan content and **scope**. Consultants would then respond and provide what they think the project would cost and how they would structure the plan, if hired. The information obtained in the **RFI** process can be used to develop a cost estimate as well as an **RFP** (Request for Proposal).

The cost of a master plan may be different for each department as each department may necessitate more input from the public, require more analysis, drawings, data search and output. Each department may require different needs and requirements, so all cost estimates may fluctuate and are the responsibility of each department to develop.

Once staff has a good cost estimate, funding needs to be identified. Master Plan funding should ideally come from the respective department budget or be identified in the 5-year **CIP**. However in many

cases master plans are grant funded. There are a wide variety of grants that can be used to help fund master plans, and are usually subject-area specific. For example, Greeley's Transportation Master Plan was funded with a state grant that was administered by the Colorado Department of Transportation.

SCOPE OF WORK

The success of any master plan is dependent on having a clear understanding of what is involved in the work, including expected goals and expectations for everyone involved in developing the master plan. After a master plan project has been approved to go forward, staff can begin developing the **scope** of work. The **scope** is an essential part of the plan development process; it is included in the Request for Proposal (**RFP**) and is the basis for consultant proposals and contract elements.

The **scope** also needs to address expectations for the final deliverable, the final plan document. Such a document is the primary deliverable of a master plan, and therefore the project **scope** of work should describe as many elements as possible regarding its purpose, audience, content, layout, and appearance. After the draft of the work **scope** is developed, it should be shared with potential core team members and/or internal city **stakeholders**.

PROJECT TEAM

The **scope** of work will indicate the **project sponsor** and **project manager**, but the department must then determine the collaborative project team. The project team should include the **project manager** and "core team" members. Some members of the core team should be cross-divisional or cross-departmental to provide alternative perspectives and viewpoints.

For example, in order to represent the relationship between community development and transportation, the project team for a transportation master plan would not only include select Public Works staff members, but also the transit supervisor and a member of the Community Development staff. Staff resources must be considered when choosing the project team due to the heavy amount of involvement required. The project teams must be involved throughout the plan development process and provide input on plan materials.

PROJECT BUDGET

Staff who recognize the importance of managing the planning process within the confines of a developed budget are more likely to have successful projects. Staff can use two methods to develop a project budget: (1) use the budget from a prior project as a reference, or (2) start from scratch using a spreadsheet. **Scope** changes (continuous and uncontrolled growth of the project goals) should be avoided; it can be harmful to the outcome of the master plan's goals; it happens when the **scope** (project structure) are not properly defined, documented, or controlled and additional items and expectations are added without addressing the effect on time, costs, and resources, which in turn effect project budget.

PROCUREMENT

When solicitation for a consultant is required to assist with developing a master plan, there are several vital components to be considered. Each **RFP** shall describe the background of the project and include a statement and **scope** of work, an overview of the anticipated outcomes, the general schedule for the project, schedule and cost, the goals of the project, and the use of an **RFP** template document (see **COGI**-purchasing-general resources). In order to solicit the most competitive price for the project, generally the total budget is not included in the **RFP**.

The solicitation package must follow the Master Plan Guide and include the Master Plan Template checklist (appendix A.) These components help provide critical information for participants to the solicitation and clarify the City's expectations of the consultant and their proposals. The **scope** of work must be organized by tasks and include a general schedule.

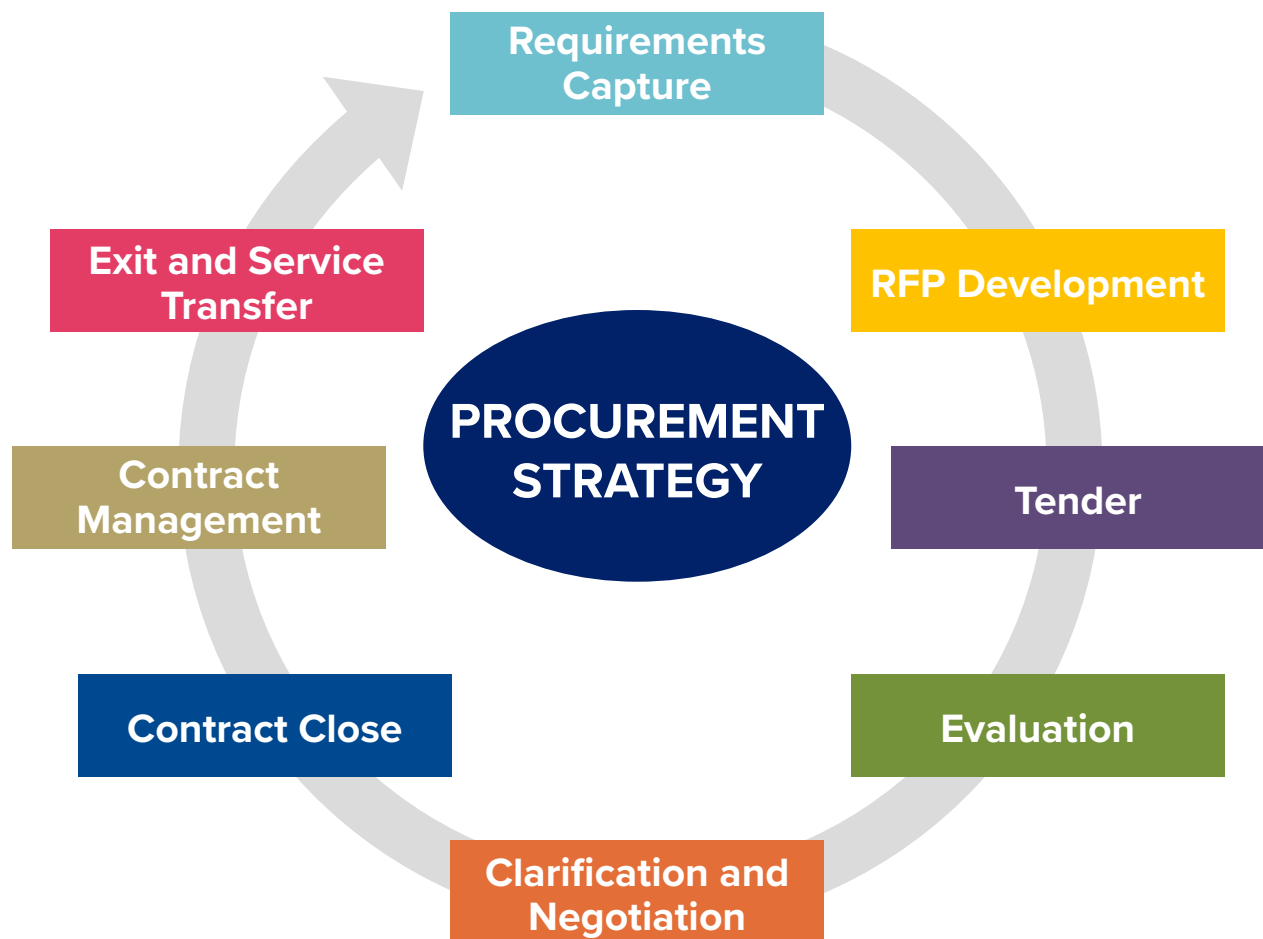


Figure 2.0: Procurement Strategy

EVALUATIONS AND AWARD

The **RFP** establishes the manner in which proposals submitted by the consultant are evaluated and scored. Sample scoring criteria for reviewing proposals submitted by consultants may include but are not limited to:

- Project team and workload capacity
- Project Approach
- Overall understanding and completeness
- Relevant project experience
- Project schedule
- Value and cost estimate
- Familiarity with Greeley

Project Kick-off

The project **kick-off meeting** is the first step to initiating the overall planning project. All members of the project team must be present during the **kick-off meeting**. This meeting will establish in further detail the project schedule and the initial tasks.

SWOT ANALYSIS

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis is a well-rounded and inexpensive method to digest the good, the bad, and what is not working so well in the department. By understanding what the department is lacking, and eliminating hazards that would otherwise catch the project team unawares. After completing the analysis, the project team provides thoughts on how the department's strengths can help maximize opportunities and minimize threats. For example, the possibility for public opposition to components of a plan could be considered a threat because it may cause project delays. The **SWOT analysis** would bring this to the attention of the project team who would identify strengths that could be used to help address public opposition and gain support.

HOW TO CREATE SWOT ANALYSIS?

The analysis can be very simple or as detailed as the department would like, but it helps to add data from existing or past projects, data obtained, and any other reliable information that can be provided while doing the **SWOT analysis**. It makes for a more thorough analysis, instead of going at it blindly. Figure 3.0, below illustrates how the **SWOT analysis** should look, but it also provides examples of topics. However, further explanation of each section is provided, to help the team identify strengths, weakness, opportunities, and threats.

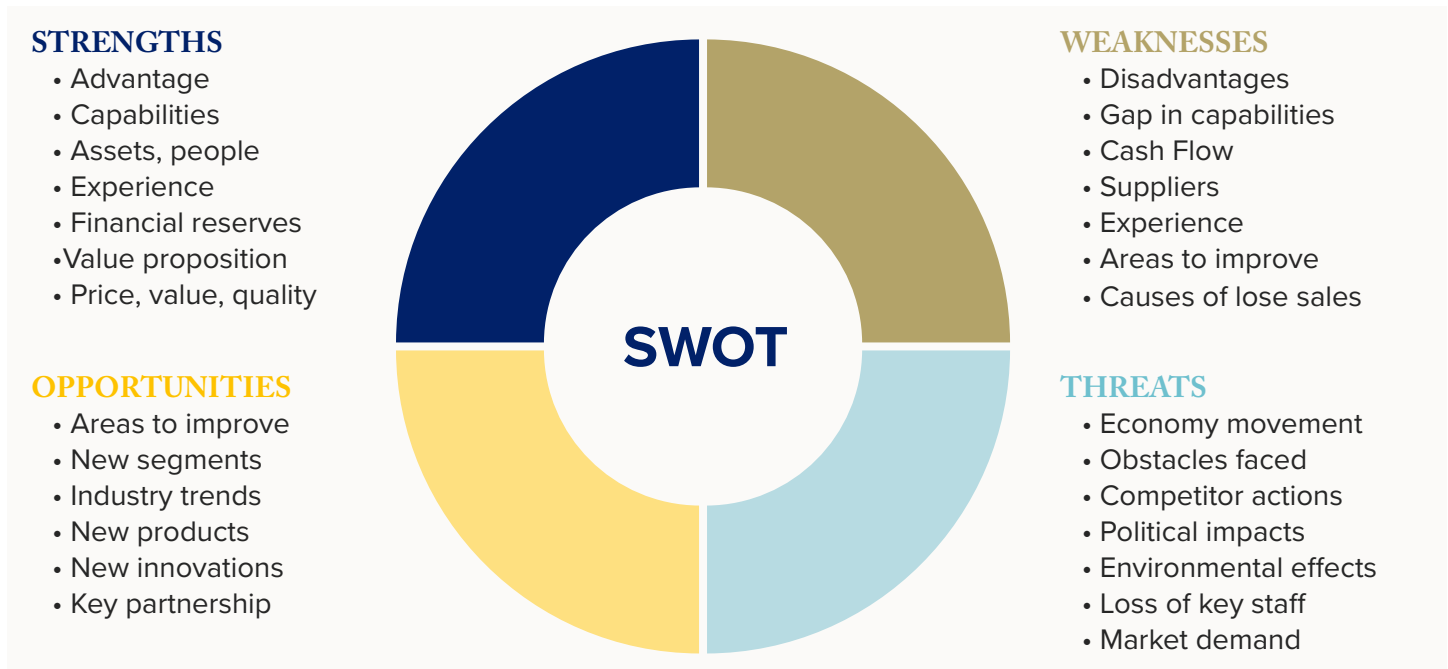


Figure 3.0: SWOT analysis diagram

Evaluating Strengths

For the strengths, the team must examine the departments and City's overall internal process, its capabilities and amenities and how they relate to the goals and actions of the Comprehensive Plan. If the team has difficulty determining the strengths, list all of the community's attributes and amenities. For example location, size, parks, recreational opportunities, water and transportation opportunities or anything pertaining to the goals of the department's master plan.

Recognize Weaknesses

All departments have aspects of existing plans that are less desirable and that could be improved upon to better the community. Those who have strengths can also have sources of weakness. For instance, a City may have inequality of infrastructure services, an excessive number of people with health issues, a leakage of revenues or the vast distance from public transportation to outdoor recreation such parks and trails. Obtaining external output from residents, may also help identify keep problem areas in the community.

Prepare Opportunities

Opportunities are always the external factors that offer positive improvement for departments or the City as a whole. Possibilities include trends, vacancy rates, economic growth/decrease, environmental and legislative changes. For instance, the City can discover that the Cache la Poudre trail corridor could provide more outdoor amenities beyond the existing trails and historic heritage.

Consider ways where the community

could take advantage of those assets that can improve the overall Comprehensive Plan goals.



Figure 4.0: Collaborative Team Effort: Greeley Firetruck Pull

Identify Possible Threats

City departments do not always compete against private businesses, instead, are faced with competition for funding, changes in constituency, and overly restrictive legislation. The City of Greeley could face threats such as increased crime, drugs, or increased traffic noise and congestion levels. These can be correlated to a decrease in population rates, increased vacancy rates, limited business and residential development when analyzing threats to name a few examples.

HOW TO USE THE SWOT ANALYSIS?

Using the SWOT is only as effective as the analysis that was provide by the team. When you use specific statistics and location information for each topic, if possible, the team can develop more detailed and actionable plans for the master plan. For instance, instead of simply noting that roads are in poor condition, identify the particular streets and how each road needs improvement. Then, apply the **SWOT analysis** to craft the master plan to help identify priorities. Adjustments are encouraged along the way, but only if the change provides comprehensive decision-making tools.

Project Schedule

The Request for Proposal (**RFP**) must include a general project schedule. However further detail must be established with the internal and external project team once the project has been kicked-off. The project team should provide input on the development of the overall project schedule, which must consider review of draft and final outline of the projects **scope** of work. When the entire team is part of the discussion and agrees to the schedule, each person is more likely to be committed to the schedule. The schedule should include an adequate timeline of each tasks for the data collection, public engagement (is a factor that should be addressed in greater-detail when planning the timeline), document review, presentations to **boards/commissions** and City Council, and proper quality management review. Further detail on public and **stakeholder engagement** timelines can be found in the next chapter of the guide. Typically citywide plans can take 6-18 months to complete. Figure 5.0 shows an example of a general schedule from a transportation master plan that was estimated to take 12 months to complete.

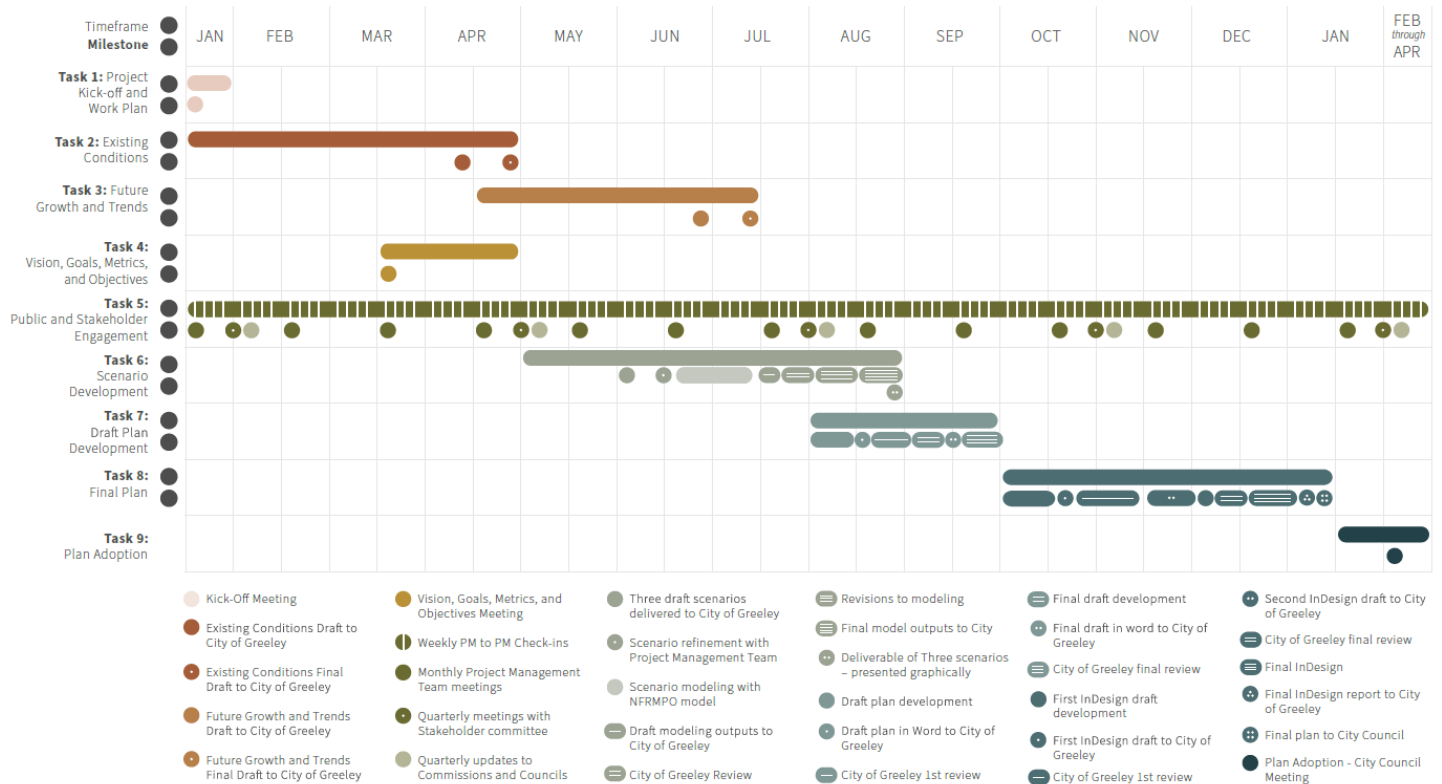


Figure 5.0: TMP Schedule

3.COMMUNITY ENGAGEMENT

There are five levels of public/**community engagement** identified in the **International Association for Public Participation (IAP2)** model, which is the preferred model used in the City of Greeley. Each level increases the degree of engagement with the public and **stakeholders**. After staff has organized a **Public Engagement Plan (PEP)**, they must request the implementation of this plan, via **COGI**, through the Communication & Engagement Department, who will foster community dialogue, civic engagement, and the increase of public participation.



Figure 6.0: Degrees of Engagement

Engagement Methods

There are many ways to engage community **stakeholders** both in-person and virtually. Methods of seeking input must include at a minimum, but are not limited to the following:

- **Public surveys** (mailed, door-to-door, or online are the most common, but not the most engaging and appear as tokenism).
- **Presentations with polling capabilities** (these require polling tools, but most can be rented by companies who hold them).
- **Host pop-up events** at community centers, parks, downtown, vendors or restaurants (outdoor fun recreational type of activities, giveaways, food and entertainment with, aimed to create a unique space for families help understand the project area).
- **Public meetings/open houses in-person or virtual** (these are generally open to the public free flowing without much structure, but it allows the public to see plans, these are best after multiple public engagement opportunities have been provided).
- **Workshops** that focus on a specific aspect of the plan that can involve citizen input.
- **Neighborhood meetings** (can be at a recreational center, a school, a community center, or other private business, even outdoors if necessitated).
- **Charrettes** (a meeting in which all **stakeholders** in a project attempt to resolve conflicts and maps solutions on boards, paper, or conversation).



Figure 7.0: Visioning Workshop

Internal and External Stakeholders

In the shortest definition, a **stakeholder** is someone who may have an interest or stake in a company, or in the case of City assets, as a constituent. Each **stakeholder** may have different views of how a neighborhood, a community, or the City should evolve over time. By considering the differing views of each **stakeholder**, the City can better evaluate decisions.

Internal stakeholders are those who are involved with the City through **boards** and commissions, as City Council members, or City staff in departments that would be impacted by the plan. For example, the stormwater division would be identified as an **internal stakeholder** for a Transportation Master Plan due to the interrelatedness between transportation and stormwater infrastructure.

External stakeholders are those who are indirectly affected by City based decisions, such as residents, other cities and governments, and private companies – in whole the community and region at large. **Stakeholders** can be organized into **technical advisory committees** and steering committees. Generally, **technical advisory committees** consist of **internal stakeholders** while the steering committee consists of **external stakeholders**.



Figure 8.0: Stakeholder Meeting

Staff should develop a list of internal and **external stakeholders** who will need to be engaged in the technical portion of the planning process. An initial **stakeholder** meeting to gain input is recommended early on in the master planning process. As the plan progresses, other **stakeholder** meetings can be scheduled to share progress and get additional input. With support from the project team, the consultant team must hold periodic workshops or focus groups with identified internal and **external stakeholders**. It is essential to record input during these meetings and show how feedback has influenced the plan.

STAKEHOLDER CONSIDERATIONS



Figure 9.0: Stakeholder Considerations

There are special considerations that need to be made before the organization of any public or **stakeholder** meeting, especially in circumstances where not every resident has access to computers or WiFi. Also consider financial, language, or knowledge-based constraints. It is important for staff to develop the public engagement framework first to ensure a thorough and proper representation of all City-wide constituents. Staff must find different ways of engaging the

public, whether it be through formal in-person meetings, online virtual forums, one-on-ones, or other creative methods to get the most feedback.

Public Engagement Plan

Soon after the **kick-off meeting** the project team must develop a **Public Engagement Plan (PEP)**. The PEP will identify when, where, and how the community and **stakeholders** will be engaged. Each department must involve the City's Communications and Engagement Department as a partner on any public engagement efforts at the inception of the master plan process, and not when the engagement starts. The PEP will also establish which level of input, based on the **IAP2** model, is best suited for each engagement method.



Figure 10.0: Youth Plan Engagement Workshop

For example, at the beginning of the planning process a presentation with polling capabilities would help inform residents about the plan and consult with them on key topics.

In general, **community engagement** is conducted at the beginning of the planning process, in the middle, and again at the end. **Community engagement** should include a wide variety of residents from all areas of the City and all demographic and social groups. Additional engagement efforts may be needed in order to gain an appropriate representation of residents and avoid bias. Meetings and events should be advertised in the newspaper, social media (Facebook, Instagram, Twitter, Nextdoor), and City websites.



Figure 11.0: PTOL skate group

Stakeholders should be engaged on a quarterly or monthly basis. These meetings tend to involve, collaborate, and empower, whereas broad public engagement usually informs, consults and involves the public. The project team will need to document and organize all of the comments received during the engagement process and show how public input was incorporated into the plan.

Public Engagement Summary

A summary of **community engagement** efforts must be included in every master plan. The public engagement summary should list each event that was held and the number of participants. Furthermore the summary should give an overview of the comments that were heard at the various stages of public engagement and how these comments were incorporated in the plan. Figure 11 is an example of a public input summary that illustrates the variety of public engagement methods that were used for the Connect Columbus Transportation Plan and the number of participants that attended each event.



OUTREACH SUMMARY



PUBLIC COMMENTS DURING THE WORKSHOPS (BY MODE)



PLAN VAN STOPS REACHED OVER

770
PEOPLE IN



Figure 12.0: Example Public Engagement & Input

4. THE MASTER PLAN DOCUMENT

Consideration should be given early on to the production of the plan document. A planning document is typically between 50-200 pages in length and contains the summary and key points that arose during the planning process. The graphics, language and layout of the document are critical to creating usable plans that are understandable and easily referenced by staff, the public and elected officials. Figure 12 shows the relationship between the planning process and the plan document. The processes are typically concurrent. At the end of the planning process a draft plan is developed and reviewed



Figure 13.0: Document Development

Determining Writing and Graphic Style

Master plan documents must be consistent in their message, analyses, conclusions, and recommendations. A good tip is to start with the **SWOT analysis** to set goals for project and gather the expectations for the paper, allowing the team members to decide content and organization.

Starting with a standard document template helps achieve consistency and adds a more professional appearance, thus making it easier for the reader to navigate. Master plans are seen by a variety of people and should therefore use language that a layperson can understand; it is important to avoid jargon or terminology that is not widely known. The text should highlight key points and takeaways using callouts or other graphics. In order to keep the reader engaged, plan text should be as concise as possible and text should be balanced with graphics and photos.

If the report is to become part of a collection of documents, it should use the same graphic style and format. If the planning project has a website and online tools for communication and **community engagement**, the graphic style of the document should clearly relate to the online presence of the overall planning project.

Basic Plan Elements

After defining the plan's format and undergoing public engagement, the project team must consider the content of plan document and begin drafting the plan. What is included in the plan will largely depend on what is heard during the public and **stakeholder engagement** process that was previously described. While content may vary from plan to plan, the below outlines broad topic areas that should be present in any master plan.

CURRENT AND FUTURE CONDITIONS

The initial sections of the plan should describe the community and existing conditions. This information will establish why the plan is needed and how it will benefit the community. Telling an effective story can be achieved by incorporating themes that were heard during public engagement, using key statistics such as population growth, funding levels, or other relevant information that tells a compelling story. Future trends impact the way a community develops over time so it is not only important to understand current conditions, but also factors that will shape the community in the future. Forecasting growth patterns, **demographics**, climate, and long term funding levels helps add validity to the long term vision of the plan. Further detail on how data is used to assess existing and future conditions can be found below.

Data Inputs

Data inputs refer to the critical information used in multiple disciplines and departments. They vary broadly based on the nature of each department's framework, but may include baseline population data, household growth, income, race/diversity, network data, or industry-specific data such as rainfall, runoff, traffic counts, parking counts, and spatial data found in maps for both current and projected conditions.

The data must tell a story to the public in a compelling, easy to read format such as tables, graphs, infographics, or maps. The data presented in a plan must help readers and users understand why a Master Plan is needed and what improvements are needed to achieve the overarching goals.

Every department may have methodology around when and how the data is obtained, but in all cases, the master plan should clearly identify what assumptions were made in analysis of data and how projections were made. In cases where updates to municipal, state or federal regulations trigger a master plan, the plan should cite the associated regulation and identify the data targets required to achieve compliance.



Figure 14.0: Resident Workshop

GOALS AND OBJECTIVES

Through **stakeholder** and public engagement, the master plan will develop a vision for the community as it relates to the subject of the master plan. The community vision looks to the future and reflects the values of the community. This is an overarching goal that the plan will work towards and sets the stage for the implementation of the plan. The Comprehensive Plan serves as a guide for the City and community as both work over the next ten to twenty years towards a shared vision for the future. While the vision and goals set forth in the Plan are aspirational in nature, progress can be made in achieving them through a commitment to adhering to the directions established by the objectives and through implementing the actions outlined in the **Action Plan** over-time (Chapter 5, **Imagine Greeley Comprehensive Plan**).

The **Action Plan**, which is organized under the ten plan elements, should be used by City departments in developing annual work plans for staff and to inform the development of the City's budget and **Capital Improvement Plan**. It should also be used as a reference for community partners and those wishing to collaborate with the City on particular efforts. The **Action Plan** provides guidance on responsibilities, types of action, and the timeframe for its completion. For further guidance on how to use the **Action Plan** in Chapter 5, visit the Community Development, Long Range Planning webpage under the

Imagine Greeley Comprehensive Plan (page 131).

These **action plans** elements are key focus areas (see Figure 14.0). The goals and objectives set forth in an individual department's master plan should reflect the related goals outlined in the Comprehensive Plan.



Figure 15.0: Comprehensive Plan Elements

PLAN IMPLEMENTATION

In addition to goals and objectives, the master plan document must also include actionable items such as **policy** recommendations, project lists, departmental leads, or critical staff directives. Actionable items will vary based on the subject area of the plan as well as the plan horizon or time frame (10, 15, or 20 years).

All future actions outlined in the plan, including project lists should be organized by short (2-5 years), mid (5-10 years), and long term (10-20 years) time frames. Typically, high priority projects are included in the short or mid-term categories. For example, a roadway project that, based on traffic modeling, would not be needed for another 20 years would be considered a long-term project..

Strategic Plan – Generally speaking, a **strategic plan** may be used as an additional document that is further used to communicate specific action items needed to achieve those goals within a Master Plan and all of the other critical elements developed during the planning process. Typically, a **Strategic Plan** covers a 5-10 year period of time.

MEASURING SUCCESS

The plan should also include metrics for measuring success. Metrics are generally data driven and quantitative such as the miles of road with poor pavement quality or number of citizens participating in City sponsored programs, and generally tracked on a yearly basis. Metrics should reflect the goals and objectives in the plan and should be influenced by the actionable items that were identified in the plan. For example, if public engagement revealed that a majority of Greeley residents support investment in natural areas, and one of the goals was to increase the acres of City managed natural areas, staff could measure progress by tracking the number of acres of **open space** added to the City per year. In many cases, achieving the goals and objectives in a plan is dependent on funding, so another important aspect of a plan is the identification of potential funding sources.

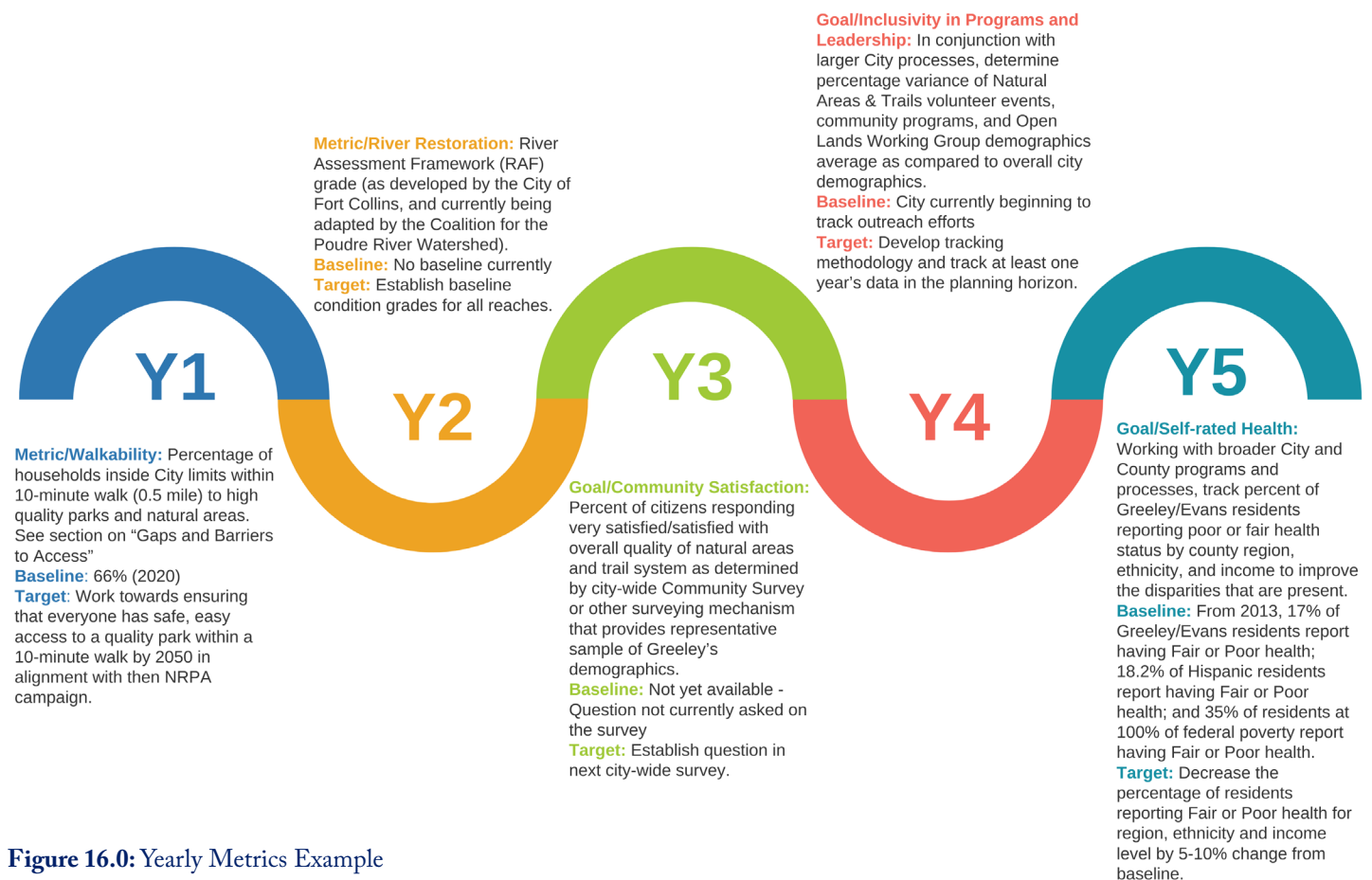


Figure 16.0: Yearly Metrics Example

5. ADOPTION PROCESS

The last critical part of the master planning process is the adoption of the plan by the City Council. The steps that are involved in the adoption process are outlined below.

- Hold a work session with the appropriate **board** (to be determined by **stakeholders**) and/or **Planning Commission**
- Hold a minimum of one work session with Council to present a 95% draft of the plan
- Recommendation of approval to the Council can be sought via **Planning Commission**
- Final **Resolution** to adopt the plan at City Council

Master Plans that need to be adopted by City Council:

- Transportation
- Stormwater
- Water and Sewer
- Comprehensive
- Parks, Trails, and Open Lands

A **resolution** is a legislative document used to record Council's decisions with more formality than a motion, but less commanding than an **ordinance**. **Resolutions** are acts of a relatively permanent nature and remain in effect until rescinded or amended by Council (or a higher law takes precedence). Generally, **resolutions** implement or carry out the terms of an **ordinance**, provide a statement of Council **policy**, or express Council's opinion on a public matter.

An **ordinance** is the highest and most authoritative form of action the City Council can take. An adopted **ordinance** is a legislative document that is used to record Council's approval of measures that prescribe general rules of conduct which citizens are expected to follow (laws), memorialize approval of land use issues (e.g., **annexation**, **zoning**, etc.), or other permanent actions. An **ordinance** remains in effect until otherwise rescinded or amended by the Council (or a higher law takes precedence – such as a state or federal provision). There are general and special **ordinances**.

“Plans,” whether “Master Plans” or not, should be approved by **Resolution**. Therefore, for example, a “Natural Areas and Trails **Strategic Plan**” should be approved by **Resolution**. Other master-like plans listed above should also be approved by **Resolution** because they are a formal expression of City Council's treatment of and approach to certain publicly-important issues. By their very nature, though, plans CANNOT be laws.

As **Ordinances** are the “bigger fish that can eat the smaller fish” (i.e. – **Resolutions**), there's nothing wrong with the use of **Ordinances** to adopt any given plan. However, it oftentimes requires a case-by-case evaluation as there may be legal implications that need to be considered. For example, **IGA's** (or

Intergovernmental Agreement - the name of a special kind of contract that is between governments) can be approved by **Resolution** or **Ordinance** (per GMC 2.07.040). The City Attorney's Office should be consulted if in doubt. A guideline for the drafting of **ordinances** is available through the City Attorney's or Clerks office.

6. TEMPLATE CHECKLIST

The template checklist is a document designed to **make your work easier**. Take a moment to think about the complexity of writing a master plan. It requires groups of public individuals to provide data and input and teams of people to synthesize vast amounts of data into recommended plans consistent with the City’s objectives. In the Appendix, the checklist is provided to give you guidance on what parts should be included. Note that some will be mandatory and some are characteristics of the organizational goals and needs.

INSTRUCTIONS ON HOW TO USE TEMPLATE CHECKLIST

1. Staff responsible for drafting the report, shall submit a completed copy of this checklist with all draft and final reports for each milestone to the **project manager** or Department Director.
2. Include a placeholder for all report sections that will be populated in future submittals under the required column and when complete check it off under the “Check, if Complete.”
3. For deviations from the template checklist, include a separate sheet with numbered comments and write the corresponding number in the “Note #” column.
4. Clearly label Sections and Subsections (bold items in checklist, some may not be required, other ideas can be included in the blank spaces) in report.

APPENDIX A

TEMPLATE CHECKLIST

TEMPLATE CHECKLIST				
Plan Sections and Components				
		Project Manager:	Date:	Dept:
		Report Section	Required	Check, if Complete Note #
Preliminaries	Chapter 1	Cover sheet	x	
		Plan title	x	
		Date of adoption	x	
		City logo	x	
		Resolution	x	
		Table of Contents	x	
		Section titles and page numbers	x	
		List of Tables	x	
		List of Figures (can be an appendix item)	x	
		List of Appendices	x	
		Acknowledgements	x	
		Executive Summary	x	
		Purpose	x	
		Brief summary of planning process	x	
		Key themes	x	

		Report Section	Required	Check, if Complete	Note #
The Why	Chapter 2	Overview	x		
		Community characteristics			
		Brief history			
		Relevant information from past plans/council directives			
		Plan Horizon			
		Plan Horizon	x		
		Existing Conditions			
		Demographics that help tell the story of why the plan is needed	x		
		Other relevant data that support goals and objectives	x		
		Additional information included in appendix			
		Public Engagement	x		
		Outreach methods			
		Key themes			
		Priorities			
		Full public engagement summary included as appendix			
		List of Appendices			
		Acknowledgements	x		
		Executive Summary	x		
		Purpose			
		Brief summary of planning process			
		Key themes			
		Priorities			
		Full public engagement summary included as appendix	x		
		Future Trends	x		
		Relevant statistics/data	x		
		Summary of key information informing goals and objectives	x		
		Vision Statement	x		

		<i>Report Section</i>	<i>Required</i>	<i>Check, if Complete</i>	<i>Note #</i>
The What	Chapter 3	Plan scenarios/alternatives	x		
		Action plan			
		Policy Recommendations			
		Metrics			
		Priority project list (organized by short, mid and long-term			
		Community Indicators			
		Funding discussion			
		Full list of projects included as appendix arranged by short, mid, and long term with maps			
		Existing Conditions Report			

		<i>Report Section</i>	<i>Required</i>	<i>Check, if Complete</i>	<i>Note #</i>
The How	Chapter 4	Vision Statement	x		
		Goals			
		Objectives			
		Metrics			

		<i>Report Section</i>	<i>Required</i>	<i>Check, if Complete</i>	<i>Note #</i>
Appendices		Public Engagement Summary	x		
		Full Project List	x		
		Funding Sources	x		
		Data Analysis	x		
		Other's list below			

APPENDIX B

GLOSSARY

Action Plan Elements: components of a detailed plan outlining actions needed to reach one or more goals

Annexation: the incorporation of land into an existing community with a resulting change in the boundaries of that community

Board: group of citizen volunteers that study special community issues and provide direction, comment and recommendations to the City Council.

Capital Improvement Project (CIP): any project resulting in a major improvement to City facilities and infrastructure. Projects may include construction and renovation of recreation centers and libraries, acquisition of parkland, repaving of streets, replacement of water and wastewater lines, and the purchase of new fleet vehicles and IT networks.

City of Greeley Intranet (COGI): an internal webpage available to City employees at cogi/, which includes resources including current policies, templates, communications, service request portals, and records management, among other functions.

Community Engagement: the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the well-being of those people

Data Inputs: See page 18.

Demographics: statistical data relating to the population and particular groups within it.

Imagine Greeley Comprehensive Plan: the City of Greeley's Comprehensive Plan adopted by City Council in 2018, which provides a vision and roadmap to guide City policies and decision-making towards the community's shared vision for the future. <https://greeleygov.com/services/lrp/imagine-greeley>

Inter-Governmental Agreement (IGA): is any agreement that involves or is made between two or more governments in cooperation to solve problems of mutual concern.

International Association for Public Participation (IAP2): – an international organization focusing on advancing the practice of public participation. The IAP2 model is the preferred community engagement model of the City of Greeley.

Kick-Off Meeting: the first official meeting of a group of people who will be working together on a project. The agenda will usually include introductions, statement(s) of mission, procedural expectations, and organization of teams or working-groups.

Long Range Expected Growth Area (LREGA): the area within which community growth is expected for the next 20 plus years and which encompasses all other growth and service area boundaries for the City.

Open Space: any parcel of land or water which is essentially unimproved and which may include cropland, areas of ecological significance or other natural features.

Ordinance: a law or rule made by a government or authority:

Planning Commission: the Planning Commission of the City of Greeley.

Policy: a course or principle of action adopted or proposed by a government, party, business, or individual.

Project Manager: the individual assigned with being in overall charge of the planning and execution of a particular project.

Project Sponsor: an individual (often a manager or executive) with overall accountability for the project. He or she is primarily concerned with ensuring that the project delivers the agreed upon business benefits and acts as the representative of the organization, playing a vital leadership role through a series of areas.

Public Engagement Plan: See Page 15.

Resolution: a formal expression of opinion or intention of the City Council.

Request for Information (RFI): a formal means of getting general information from vendors typically used when an organization is unsure what solution may solve a problem.

Request for Proposals (RFP): a formalized and structured way of getting specific vendor information including pricing. This process allows an organization to detail the problem a project should solve and invites vendors to suggest solutions.

Scope: a detailed outline of all aspects of a project, including all related activities, resources, timelines, and deliverables, as well as the project's boundaries.

Stakeholder: individuals and organizations with any interest in a project outcome, including project managers, teammates, customers, citizens, and any other key individuals.

Stakeholder Engagement: the systematic identification, analysis, planning and implementation of actions designed to influence and/or receive input from stakeholders.

Stakeholder, External: See Page 13.

Stakeholder, Internal: See Page 13.

Strategic Plan: See Page 20.

SWOT Analysis: See Page 8.

Technical Advisory Committee: See Page 14.

Zoning: a regulatory tool used by local governments organize land-use types into structured districts, or zones, within a municipality. Zoning is covered in Chapter 18.30 of City of Greeley Municipal Code.