

## **IMPLEMENTATION PROGRAM**

The Pinetop-Lakeside General Plan implementation strategies are derived from public preferences expressed during the Plan Update process. Proposed actions respond to each Element's existing conditions/issues evaluations, the Goals and Objectives suggested by citizens to bring about desired change, and general recommendations intended to provide future direction to one or more of the Elements.

In many instances, suggested implementation steps relate to multiple planning initiatives. Trail improvements, for example, support Circulation, Land Use, Growth Areas, Environmental Planning and other aspects of the Plan as well as the Open Space/Recreation Element.

The Town's basic community planning principles are evident throughout the Implementation Program. The *Linking Our Landscape* approach provides fundamental guidance for connectivity among activity centers, neighborhoods, and access points to outdoor venues. Preferences for sustaining the small town atmosphere reflects earlier citizen visioning efforts, Town strategic planning, and policy statements from numerous public and private groups. Especially, the recommended form that illustrates selected development opportunities with emphases on preserving open space grows directly from the *Town Plan* concepts.

The Implementation Program's three components are intended to build, then sustain, momentum toward achieving the General Plan goals. They have built-in flexibility that encourages, even requires, revisiting the Plan's direction on a regular basis.

These main General Plan follow-through methods are:

- *Phased Program.* Most Goals will need to be accomplished in stages. One objective or one step at a time leads to cumulative success moving toward the desired outcome.

Potential actions are indicated, to suggest a priority order, in short-, mid-, and long-term time frames. Many of the implementation initiatives start in one of the phases and continue with subsequent steps through the Program's duration and, possibly, beyond as further, goals may be set.

- *Plan Monitoring.* To fulfill the purposes of General Plan implementation, it is important to note which actions steps are being taken or have been completed. Also, a judgment might be recorded as to the relative degree of the action's progress -- a "grade card" ranking.

Monitoring should be undertaken regularly (e.g., quarterly, semi-annually or during the yearly General Plan Amendment reporting cycle). Information provided by staff enables the Planning and Zoning Commission and Town Council to determine whether action priorities should be revised. Changing conditions may dictate whether a particular item should be continued, expedited or dropped altogether.

- *Resource Allocation.* Entering the 2010s, Pinetop-Lakeside, as many jurisdictions throughout Arizona and the United States, faces reductions in revenue. Implementation projects will have to compete for scarce dollars. A greater proportion of Town budgets needs to be spent on day-to-day expenses; less is available for capital improvement investments.

Alternative funding sources are being explored. Some options, such as raising development fees or taxes, might turn out to be counterproductive.

Prospects for new financial resources should be explored. Funds that may be accepted for earmarked programs, such as private foundation grants for open space acquisition or Federal stimulus initiatives pertaining to job creation or energy efficiency, must be carefully evaluated to determine whether hidden costs for administration, operations and maintenance might be burdensome in the long run.

## **A. Phased Program**

Recommended implementation actions, as noted above, have their foundation in the General Plan's vision and Element's assessments. Continuity is maintained by following up on all of the Plan's goals. Implementation observes consistency, also, by avoiding conflicting actions -- unless a mid-course correction is acknowledged to be necessary during periodic, strategic Program updates.

As important as an individual action step may be, it should be understood that the Town can't address every item, at once. Depending on current needs and resources, projects should be allocated within the fiscal years assigned to each phase.

Some implementation projects may already be underway or should be undertaken soon to lay the groundwork for later steps; others may need to be deferred until prerequisites (such as detailed studies or funding) are in place. Actual priorities in each of the phases would be established by Town Council, often based on recommendations by the Planning and Zoning Commission, other advisory committees, organizations, the business community, or other appointed individuals.

- **Short-Term Actions (2011-13)**

First steps get implementation started during the first three years following General Plan adoption and voter ratification. These may include initiatives already in progress, such as trails planning. Regulatory mechanisms, ordinances establishing criteria for Node's development, might be addressed early in the Program.

Typical actions in the first phase include projects that would demonstrate early implementation success, organizing or designing for goals that may extend over several years, and, of course, proposals that can be instigated without becoming a drain on community resources. "Baby steps" are

appropriate to build implementation momentum. The Town does not want to overpromise; rather, the focus should be on attainable results.

<b>SHORT-TERM (2011-2013)</b>				
	<b>Action Item</b>	<b>Comment</b>	<b>Action Type</b>	<b>Organization</b>
LU	Nodal Devt implementation tools	Criteria for specific plans, design review	Ordinances	TS, P&Z, TC
	Open Space Protection	Stds for space, foliage, views	Ordinances	TS, P&Z, TC
	Neighborhood Preservation	Establish criteria, communications, mtgs	Guidelines	TS, CitAB
	Cohesive Economic Vitality	Year round sustainability support, marketing	Explore	OSC, CitAB
CF&S	Utility Providers demand analysis	Develop reporting system	Guide	Pvdr
	White Mountains Land Trust	Expand base, Woodland Lake lands	Explore	OSC, CitAB
HSG	Neighborhood Compatibility	Buffering, accessibility, multi-modal	Ordinances	TS, CitAB
	Clustering in Nodes	Specific plan housing, density incentives	Ordinances	TS, P&Z, TC
ECV	Ecotourism Prospects	Initiate "Pinetop-Lakeside Experience"	Guidelines	BusO, CitAB
	Node Trade-Offs	CIP, incentives for connections, amenities	Ordinances	CitAB, PropO, TS, P&Z, TC
WR	Planning Coordination	Joint planning, info clearinghouse	Guidelines	Pvdr, TS
CoD	Assess Impact Fees	Review, adjust as needed	Evaluate	}
	Development Investment	CIP & devt fee expenditures	"	
	Need for Bonding, Taxes	Assess revenue flow	"	
	Additional Funding Sources	Explore "open space preservation model"	"	
OS/Rec	Trails Master Plan	Complete Town-wide plan, connection	Plan	TRACKS, OSC
	Open Space Master Plan	Conduct future needs assessment	Plan	OSC
	Private Devt O/S	Update requirements for meaningful open space	Ordinances	Dvprs, PropO, P&Z, TC
	Land Acquisition (WLP)	Assess devt potential, open space allocation	Guidelines	USFS, TS, TC
Circ	Bicycle/Pedestrian Circulation Master Plan	Augment Master Trails Plan	Plan	TS, CitAB, BusO
	Pedestrian Safety Improvements	Implement recommendations	Install	ADOT, TS
	Roadway improvements	Implement recommendations	Install	ADOT, TS
	Participate in Regl Transp Comm	Improve transportation coordination	Communicate	TS, P&Z, TC
GA	Prepare Node Specific Plans	Apply criteria, include neighborhoods	Plan	TS, PropO
Env/En	Environ Quality/Sustainability Board	Appoint oversight group	Organize	Town, TC
	LEED certification public bldgs	Explore alternative energy sources	Evaluate	TC

**Element Legend:** LU = Land Use; CF&S = Community Facilities and Services; Hsg = Housing; ECV = Economic Vitality; WR = Water Resources; CoD = Costs of Development; OS/Rec = Open Space/Recreation; Circ = Circulation; GA = Growth Areas; Env/En = Environmental Planning/Energy  
**Organization Legend:** Org = Organization; PropO = Property Owners; CitAB = citizen advisory board; BusO = business organization; TS = Town Staff; TC = Town Council; P&Z = Planning and zoning Commission; OSC = Open Space Committee; Pvdr = Provider; ADOT = Arizona Department of Transportation  
 USFS = United States Forest Service

- Mid-Term Actions (2014-17)

After the Implementation Program's first three years, actions designated for the mid-term entail continuations of projects already begun. In some instances, phased activities may have been deferred to allow for preparedness steps or funding resources to be assembled.

Frequently, this second Implementation Program stage provides increasing evidence of tangible results. Projects move from design to build or install. Significant adjustments to priorities are likely by this time. Needs may have changed. Previously unforeseen opportunities (e.g., funding sources or grants) might become available.

Beginning the Mid-Term Phase is the right time to revisit all items listed in the Program. Completed projects or those ahead of schedule may justify expedited next steps. Recommended Phase I actions that didn't get attention, for whatever reason, might be deleted entirely or replaced with an updated objective. New projects or priorities should be evaluated.

<b>MID-TERM (2014-2017)</b>				
	<b>Action Item</b>	<b>Comment</b>	<b>Action Type</b>	<b>Organization</b>
LU	Job Creation	Capitalize on improvements, Nodes to attract employers	Publicize	Dvprs, TS, BusO
	Continue Nodal Development	Node infill, begin additional cores	Incentives	TS, TC
	Continue Neighborhood Preservation	Sustain homeownership programs	Recognition	TS, TC
CF&S	Education Enhancements	Needs assessment, initiate programs	Job training	Employers, educators, BusO
	Continue White Mtn Land Trust	Development agreement approach	Negotiate	TC, USFS, CitAB
HSG	Assess weatherization needs	Apply for funding assistance	Implement	TC, TS
	Different Living Options	Address special needs, workforce housing	Evaluate	TS, P&Z, TC, BusO
	Continue Node residential mix	Consider additional incentives	Assess need	TS, CitAB, P&Z, TC
ECV	Recruit high-tech jobs	Site opportunities, incentives	Attract employers	BusO, TS
	Develop forest industries	Site opportunities, regional cooperation	Attract	BusO, TS

			employers	
	Continue ecotourism	Expand events, attractions, seasons	Guidelines	BusO, CitAB
WR	Surface Water Protection	Develop conservation formulas	Guidelines	Pvdr, irrigation districts
	Sustainable Supply/Quality	Estimate supply trends, treatment needs	Research	providers
CoD	Continue Development Investment	Budget for trails improvements, land acquisition	Funding	TS, TC, TRACKS
	Continue Alternate Funding	Evaluate "open space model"	Attract employers	TS, Devpr, CitAB, BusO
OS/Rec	Install Trails Master Plan improvements	Add annual increments to CIP	Update	TRACKS, CitAB, TC
	Implement Open Space Master Plan	Prioritized Plan recommendations	Install	OSC, TC
Circ	Implement Bicycle/Pedestrian Plan	Scheduling, funding	Install	TS, ADOT, TC
	Continue roadway, pedestrian safety	Complete planned improvements, set new priorities	Update	TS, ADOT
GA	Continue Node Specific Plans	Solicit property owner, neighborhood interest	Plan	TS, PropO
Env/En	Expand conservation areas	Improve additional nature, wildlife areas	Update	CitAB, TS, TC
	Continue alternative energy	Expand Town building, equipment programs	Policy	TC

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- Long-Term Actions (2018+)

The third Phase serves as a bridge extending to the next Pinetop-Lakeside General Plan Update and beyond. Implementation actions that are well underway should be moving toward completion or, perhaps, continuing with the Town's sights set to higher objectives.

At this point on the Implementation continuum, it may be appropriate to identify and lay the foundation for the next generation of comprehensive implementation strategies.

<b>LONG-TERM (2018+)</b>				
	<b>Action Item</b>	<b>Comment</b>	<b>Action Type</b>	<b>Organization</b>
LU	Reevaluate Town Plan Nodes	Measure success, revise criteria as needed	Update	TS, P&Z, TC, CitAB, BusO
	Continue employment sites	Profile available locations; new: Porter, Penrod	Attract employers	TS, BusO, Dvprs
CF&S	Long-range Woodland Lake Park	Prepare acquisition, compatible development scenarios	Plan	USFS, CitAB, OSC, TC
	Continue Education programs	Address specific employer/employee needs	Job training, assessment	Employers, educators, BusO
HSG	Implement needs assessment	Complete Town-wide weatherization	Build, rehab	BusO, TS
	Continue weatherization programs	Inventory, address all homes in need	Assistance	TS
ECV	Workforce inventory	Assess employment trends; job training opportunities	Research	BusO, educators, TS
	Complete ecotourism	Reevaluate, diversify "experience" opps	Update	BusO, CitAB
WR	Regional aquifer evaluation	Participate in Pinetop-Lakeside, Coconino studies	Research	Pvdr, ADWR, ADEQ
	Long-Term Water Strategy	Consider future acquisition, facilities options	Plan	providers
CoD	Revisit Development Fee schedule	Consider new fee categories, adjustments	Update	TS, TC
	Regulatory relief	Explore methods to expedite, cut costs	Research, Ordinances	BusO, TS, P&Z, TC
OS/Rec	Continue Trails Master Plan	Complete first phase; address system gaps	Acquire, prioritize	TRACKS, CitAB, TS
	continue Open Space Master Plan	Expand, improve multiple venues	Acquire, install	OSC, TC
Circ	Comprehensive Circulation Study	Assess multi-modal success, future needs	Update	ADOT, TS
	Continue Bicycle/Pedestrian Plan	Complete first phase; add linkages	Install	TS, CitAB, BusO
GA	Consider other locations	Develop concepts for other sites (e.g., Woodland Lake)	Plan	TS, PropO, USFS, CitAB
Env/En	Town-wide energy efficiency	Initiate pilot programs	Plan	providers

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[A Composite Matrix (e.g., showing all Phases, Elements, cross-references) to be developed, write intro]

## **B. Plan Monitoring**

Pinetop-Lakeside takes its General Plan seriously. Throughout the Plan updating process, participating citizens expressed appreciation for the guidance supplied by the document adopted in 2001. The spirit of Town progress over the past decade - - with recently added, refined development concepts -- provides the impetus for on-going civic improvements.

Implementing declared Goals and Objectives serves as the primary test of General Plan effectiveness. To demonstrate that the Plan is working, there must be regular evaluations of its progress. And, to keep it functioning smoothly, the Town needs to maintain balance and flexibility in its planning policies.

### **1. Measuring Success**

Benchmark records need to be kept from the outset of the General Plan's tenure. Town staff is best positioned to act as an information clearinghouse for data collected by various departments, agencies and service providers. Simple reporting formats can be designed (and timely reminders issued) to gather updates and various types of performance statistics such as traffic flows, development applications, permit issuances, complaints, business license issuances, accident occurrences, revenue collections and other categories of information that are kept as a matter of course.

After simply compiling these data categories, the Planning Department would add its observations on pending and recently decided development proposals (including remarks relating to decision consistency with General Plan principles) as well as providing a checklist of recent activity on Action Plan steps.

These regular status reports constitute the first step of General Plan success monitoring. With information in hand on, say, a quarterly basis, the Planning and Zoning Commission can issue an objective, critical assessment about

Pinetop-Lakeside planning progress on an interim basis. This evaluation, presented to Town Council, represents a "heads up" on planning trends, accomplishments and shortfalls.

Establishing an evaluation cycle is extremely important to maintain General Plan Implementation Program momentum. The compendium of quarterly updates feeds into an annual implementation analysis. Perhaps timed to coincide with the Town's yearly General Plan Amendments considerations, the full assessment provides perspective, not only about the proposed Amendments, but, also, regarding Town-wide conditions ranging from environmental protection to the local economy's health.

## **2. Revising Implementation Priorities**

Commitment to Plan monitoring keeps the process active. Knowing that recalibration can be expected energizes the public, staff and Town leadership to study and use the General Plan with a common civic improvement purpose.

The Implementation Program, should be questioned:

- What actions were intended but didn't get addressed?
- Which projects need to be rethought, moved up, delayed or deleted entirely?
- Are public and private resources being deployed where they will do the most good?

Available financial resources will be a determinant in reassigning Action Steps. Staff workloads, as well as prospects for assistance from other agencies, organizations and advisory committees may also make a difference as to how aggressively particular tasks can be pursued.

The Town's capital improvement budget is central to many implementation matters. In the event of greater or lesser funding capabilities, General Plan-related investments may be shifted to different fiscal years.

Assigning relative importance among Action Steps may be done more objectively through a simple "scorecard" process.

Current and upcoming items should be critically evaluated to consider changes in project priority or scale. Progress report findings help to indicate changes in demand, development timing schedules, and overall public support for individual projects.

Steps being considered for possible adjustment should be listed (accompanied by relevant comments reflecting noted changes) on a scorecard ballot. First, citizens would be given an opportunity to give responses on a website survey. They would be asked to rank the selected Implementation Program steps as to: 1) perceived progress to date; and 2) preferred adjustments in the current schedule for completing or initiative Action Plan steps.

The Planning and Zoning Commission would be provided the results from public input before preparing a Commission scorecard. This advisory would be forwarded to Town Council as a recommendation for possible Minor General Plan Amendment to the Implementation Program

Council consideration could lead to revising some or all of the suggested priority changes. As a rule, these changes would not receive Major General Plan Amendment status inasmuch as they reflect implementation rearrangements, not significant alterations to the Plan, itself.

## **C. Resource Allocation**

Funding desired implementation projects relies on careful pre-planning to make sure that monetary resources will be available when needed. Expenditures must be justifiable in cost-benefit terms.

Human resources, including dedicated people and organizations, also need to be applied where they will do the most good. The step-by-step Action Plan process is vital to avoid spreading citizen, agency and Town staff commitments too thin.

### **1. Town Funds**

Municipal budgets are a first source for funding many Action Steps. Expenditures from the Town's Fiscal Year Budget, including earmarked Capital Improvement Plan projects, need to serve general public needs and/or purposes for which fees have been collected.

General Fund resources provides for Town staff activities related to General Plan administration, reporting supporting implementation initiatives and conducting annual updates such as the Major General Plan Amendment cycle. Project funding would usually entail project allocations in the CIP budget, but may also include separate funding for special studies or site designs.

Development Fees are collected for specified purposes. Accumulated funds may be applied to Implementation Program items; however, any such expenditures must benefit, proportionately, the owners of properties for which the development impact fees were assessed.

### **2. Grants**

Outside funding resources are especially important during the lean economic times being experienced at the outset of the 2010s. The Town should explore grant programs that are available to support activities consistent with the General Plan and its Implementation Program.

Federal funds offered in the form of economic stimulus packages may benefit Pinetop-Lakeside in some respects. However, federal grant prospects should be evaluated carefully to be sure that their purpose meshes with the Town's interests. Energy Efficiency grants, for example, are broadly funded, but may require inordinate administrative or investment expense. Renewable energy projects may not fit Pinetop-Lakeside's character (e.g., meadows covered with solar panels, wind turbines) or those that might have been unsuccessful (i.e., biomass generation) in nearby communities.

Future programs for job development may be worth investigating. Again, care should be taken to determine whether program specifications are appropriate to the community.

State assistance programs are expected to be very limited for the foreseeable future.

Perhaps the best opportunities for outside financial help may come from private foundations. Organizations with forest, wildlife and clean water agendas -- which have provided assistance to Pinetop-Lakeside in the past -- are possible implementation supporters for several Elements' Action Steps.

### **3. Development Implementation Partnerships**

Mutual interest shared between the Town and private developer investors merits consideration of innovative joint ventures directly related to General Plan implementation strategies. Planning and constructing improvements in the designated Node locations (including amenities for adjacent neighborhoods) is a natural choice for cooperation. Another expanded opportunity for improvement liaison could be established among the Forest Service, utility providers, the Town and other interrelated entities --

particularly prospective developers of USFS exchange parcels in the Woodland Lake Park area.

Development agreements could be negotiated to provide for long-term financing, payback agreements, fee waivers, operations/maintenance contracts and other mechanisms that would enable early implementation of trails, recreation, open space, educational and public meeting place facilities among many possibilities.