

PREPARING FOR SUCCESSFUL PLANNING BOARD AND ZBA MEETINGS



TUG HILL LOCAL GOVERNMENT CONFERENCE WATERTOWN, NY ■ MARCH 29, 2018



SESSION OVERVIEW

1. What is a Successful Meeting?
2. Preparation
3. Meeting Time!
4. Post Meeting
5. In Practice
6. In Summary



Source: <https://www.google.com>



WHAT IS A SUCCESSFUL MEETING?



A SUCCESSFUL MEETING...

Respectful
Fair
SEQRA
Communicate
Know Regulations
Responsibility
Be Prepared
Clear Next Steps



A SUCCESSFUL MEETING...

A Board Chair/Member Perspective:

- Do your homework
- Site visit (actual or virtual)
- Be attentive and respectful of all parties
- Ask appropriate questions at the appropriate time
- Concisely identify any additional information needed
- Have a basic understanding of review requirements and board responsibilities
- Clearly state reason(s) for a decision
- Prepare draft resolutions



A SUCCESSFUL MEETING...

A Chair's Role:

- Manage flow of meeting and discussions
- Explain procedural steps for applicant, board and public
- Follow procedural steps consistently
- Allow opportunity for discussion/input by applicant, board, supporter and opponents
- Keep board members on task
- Time keeper

"It is about relationship building and trust. Though everyone may not agree with the outcome, it is important to be consistent, fair and respectful to all the parties."



A SUCCESSFUL MEETING...

An Applicant's Perspective:

- Board clearly identifies additional information needed
- Share public comments received with the applicant
- Board members have an open mind and leave political agenda at home
- Board members review an application based on validity of that specific project and review requirements
- Understand the zoning, SEQRA and other requirements for review
- Understand what is within the board's purview (or not)



A SUCCESSFUL MEETING...

A Staff Perspective:

- Be prepared
 - Review application materials
 - Site visit
- Communicate with staff prior to meeting
 - Ask procedural or technical questions
 - Share questions for applicant in advance
 - Identify additional information needed from applicant
- Know your role
 - Stay in your purview box
- Become familiar with zoning and other local regulations
- Don't treat the applicant or their representative as the enemy – be respectful
- Prepare draft resolutions



PREPARATION



PREPARATION

- **Review application materials in advance**
 - Application, SEQRA form, plans, graphics, staff comments, etc.
 - Checklist?
- **Familiarize yourself with the project**
 - Review zoning, comprehensive plan and other regulations applicable to that specific application (site plan, subdivision, variance, etc)
 - Site / project history
 - Neighborhood context
 - Environmental features (ex: wetlands, floodplains)
 - Infrastructure (ex: sewer, water)
 - Use online resources where possible



PREPARATION

- **Referrals from other boards/commissions**
 - Planning Board, ZBA, environmental/conservation committee, historic commission, etc.
- **Understand your role**
 - Advisory or approval authority
 - Application type (site plan, variance, etc)
 - Prepare questions based on review purview



PREPARATION

- **Staff Reviews / Coordination**
 - Are there staff reviews?
 - Gather comments from various departments
- **Board Work Session or Internal Meetings**
 - Formal work session (advertised, open to public)
 - Staff meeting with Chair and Vice Chair
 - Discuss procedural steps and technical details
 - Caution: do not discuss via email or when a quorum is present
- **Site Visit**
- **Proper advertising and notification of meetings**



IT'S MEETING TIME!



MEETING TIME

- Understanding of who will attend
 - Board members, governing body, public, special groups, media
- Chairman calls meeting to order
- Agenda
 - Some boards ask for approval of agenda
 - See if you can move items up that require less discussion
- Minutes
 - Approval of minutes (can be formal or informal)
 - Ensure they are posted and available



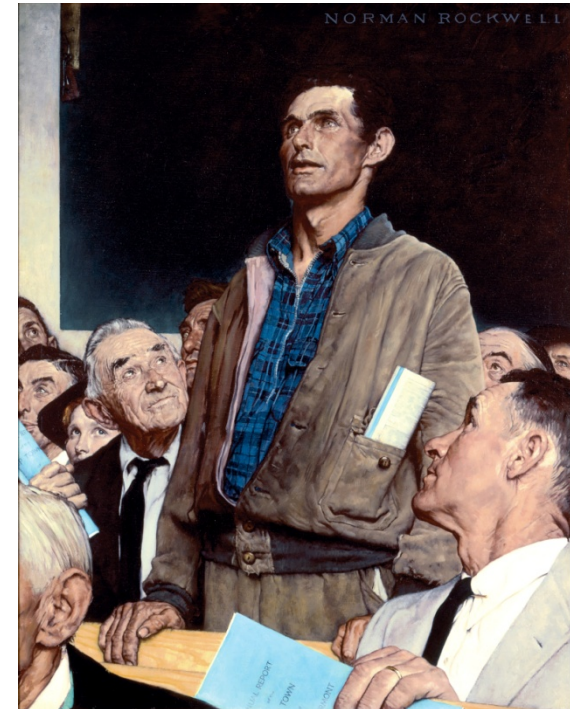
MEETING TIME

- Chairman maintains order of agenda / describes procedural steps
- Applicant presentation
- Board input
 - Some follow formal presentation process, some are informal Q&A



MEETING TIME

- Public input
 - When does it occur? (before meeting, after application, end of meeting)
 - Is it Public Hearing? (more formal process; different notification requirements)
 - How are board and applicant allowed to engage with public?
 - Limitations on speaking (limit time, request a spokesman to speak)
 - How do you respond? (direct interaction, formal response, applicant)



MEETING TIME

- Actions
 - Prepared resolutions for approval or denial
 - Motions made by board members
 - Recommendations/ referrals to other boards
- Different procedures
 - Site plan, subdivision, special use permit
 - Helps to have your municipal attorney present
- Other items of interest
 - Updates on projects and planning efforts
- Meeting adjournment



POST MEETING



POST MEETING

- Chairman signature on approved plan / resolution
- Approved materials in record
- Was there an approval with conditions?
 - Written conditions for applicant and building department
- Was there a denial?
 - Written reasoning for denial on record
- Someone to guide process
 - Follow up with applicant on actions/ outstanding items



IN PRACTICE



IN PRACTICE

- ✓ Complete Application Submitted
 - ✓ Application
 - ✓ Site Plans
 - ✓ SEQRA forms
- ✓ Board Packets Distributed
 - ✓ Staff comments
- ✓ What now?



IN SUMMARY



IN SUMMARY...

- **Be Prepared**

- Review Application Materials
- Site Visit
- Understand Review Requirements
- Role of Board in Review
- Ask Questions of Staff in Advance

- **Be Respectful**

- All parties

- **Be Clear**

- Additional Information Needed
- Next Steps



THANK YOU

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