



Appendix C: Comprehensive Plan Update Process and Schedule

Appendix C. 2030 Comprehensive Plan Update Process and Schedule

In 2006, the Orange County Board of County Commissioners approved a process and schedule to update the County Comprehensive Plan. The process was separated into two phases: 1) development of the County Data Element and preparation of Plan goals, and 2) preparation of Plan Elements. Below is an outline of the approved process followed by a summary timetable.

Comprehensive Plan Update Process

PHASE I, FRAMEWORK, GUIDELINES, COUNTY PROFILE ELEMENT, AND GOALS DEVELOPED:

1) Develop Plan Framework and Guidelines

- a) Planning Staff develops Comprehensive Plan Process website for posting schedule, meeting dates, work products, BOCC principles, and any other information requested by the Planning Board.
- b) Planning Board/Staff develop process for updating the BOCC throughout the Comprehensive Plan development process.
- c) Planning Board/Staff develops opportunities for citizen knowledge, access, and participation.
- d) Planning Board/Staff define Purpose and Scope of Comprehensive Plan.
- e) Planning Board/Staff review sample Comprehensive Plans from other jurisdictions to develop Table of Contents and definitions for Comprehensive Plan, reflecting sections that cross Elements, as well as sections to be addressed under each Element, and ensure comprehensiveness. Links to other comprehensive plans are provided on website.
- f) Element Managers develop formatting requirements for Comprehensive Plan (i.e. font type, size, numbering scheme, etc).
- g) Check-in point with BOCC.
- h) Planning Board/Staff reviews the "1981 Land Use Element/Comprehensive Plan".
- i) Planning Board/Staff develop guidelines for each pertinent advisory board to develop its own Draft Goals and Objectives consistent with BOCC principles in a collaborative effort.
- j) Planning Board/Staff develop Process/Guidelines for the implementation of action strategies that are included in Draft Elements. Those that involve amendments to the County's land use ordinances (Land Use Element, Zoning, Subdivision, etc.) must be channeled through the Planning Board.



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- k) Planning Board/Staff develop Process for periodic evaluation and update of completed Comprehensive Plan.
- l) BOCC endorses process/guidelines for implementation of amendments to land use ordinances (Land Use Element, Zoning, Subdivision, etc.).
- 2) Draft County Profile Element
 - a) Planning Board/Staff compile, review, and select data (e.g. demographic, socioeconomic, and agricultural) available from Planning Department, other County Depts., and other sources.
 - b) Planning Board/Staff interpret historical data, identify trends/assumptions, and prepare projections.
 - c) Planning Board/Staff develop list of tables/charts/graphs to be included in County Profile.
 - d) Planning Staff prepares Draft County Profile Element for Planning Board review and comment. For comparison, more than one source can be used for projections (i.e. Planning Department and State of NC) and more than one scenario can be provided (i.e. low, medium, and high growth). Planning Staff will also review historical projections to see how accurate they have been.
 - e) Planning Staff revise Draft County Profile Element to address Planning Board's comments.
 - f) Planning Staff and Planning Board forward Draft County Profile Element and guidelines for use to Element Lead Advisory Boards for preliminary review in advance of upcoming joint advisory board meeting.
 - g) Check-in point with BOCC.
- 3) Planning Board and Planning Staff (Meeting Facilitator?) Conduct Joint Advisory Board Meeting(s)
 - a) Present Draft Purpose and Scope
 - b) Present adopted process and schedule
 - c) Present Draft County Profile Element for feedback
 - d) Distribute the Planning Board's evaluation of the 1981 Land Use Element/Plan (original Comprehensive Plan)
 - e) Convey process for developing new Goals and Objectives, which will include independent work on behalf of pertinent advisory boards. Advisory Boards asked to designate Liaisons.
- 4) Element Lead Advisory Boards Develop Work Products - [a Planning Board and Planning Staff Liaison will be



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available upon request to assist each advisory board through these steps.]

- a) Review adopted County Principles, goal development guidelines, and other pertinent documents as determined by the Element Lead Advisory Board.
 - b) Each advisory board will be invited to summarize or reference its own existing reports and plans, which are forwarded to the Planning Staff for distribution to other advisory boards.
 - c) Each advisory board will be invited to comment on Draft County Profile Element and will develop new Goals for its individual element(s).
- 5) Final Draft County Profile Element, Draft Evaluation of the 1981 Land Use Element/Plan, and Goals- Completed or in the case of Goals, compiled by Planning Staff and reviewed by Planning Board.
- a) Advisory Boards forward new Goals for their individual Element(s) and comments on Draft County Profile Element to Planning Board
 - b) Planning Staff and Planning Board accept and review submitted work products from advisory boards.
 - c) Planning Staff drafts proposed composite profile element, evaluation of 1981 Land Use Element/Plan, and compiles Goals submitted by Element Lead Advisory Boards.
 - d) Planning Board accepts and reviews draft composite profile element and Goals
 - e) Planning Board invites advisory boards to joint work session to review proposed draft composite profile element, share Planning Board's evaluation of 1981 Land Use Element/Plan, and compiled Goals.
 - f) Planning Board revises proposed draft composite profile elements appropriate and with input from Element Managers develops outreach to the public.
 - g) Planning Board submits proposed draft composite profile element, evaluation of 1981 Land Use Element/Plan, and compiled Goals to BOCC.
 - h) BOCC accepts Planning Board's submission from item g above.
- 6) 1st Public Hearing
- a) Planning Board—with assistance from other Lead Advisory Boards—conducts outreach identified in the previous step (item 5f).
 - b) BOCC holds public hearing on Draft County Profile Element, Evaluation of the 1981 Land Use Element/Plan, and Goals.



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- c) BOCC conveys any required changes to the Draft County Profile Element and Evaluation of the 1981 Land Use Element/Plan to the Planning Board. Any changes to Goals will be conveyed to respective Element Managers and Lead Advisory Boards for revisions.
- d) Planning Board provides recommendations to BOCC on Draft County Profile Element, Evaluation of the 1981 Land Use Element/Plan, and Goals.
- e) BOCC may also invite additional county advisory boards to provide recommendations.
- f) BOCC adopts Draft County Profile Element, Evaluation of the 1981 Land Use Element/Plan, and Goals.

END OF PHASE I

PHASE II, REMAINING ELEMENTS DEVELOPED:

- 1) Planning Board and Planning Staff (Meeting Facilitator?) Conduct Joint Advisory Board Meeting to Review Advisory Board Roles and Work Products to be Completed during this Phase.
- 2) Respective Departments and Element Lead Advisory Board(s) Develop Draft Elements
 - a) Draft Elements, including Objectives to reach Goals, are prepared by the appropriate advisory boards working from adopted County Profile Element and Goals (A Planning Board and Planning Staff Liaison will be available upon request to provide assistance to each advisory board).
 - b) Within respective areas of expertise, Contributing Departments review pertinent sections of draft text for accuracy.
 - c) Advisory Boards will provide for appropriate public access and awareness using Comprehensive Plan website.
 - d) Each advisory board may review staff and advisory board reports and other pertinent documents such as Shaping Orange County's Future Report and Rural Character Study.
 - e) Element Lead Advisory Boards exchange their Draft Elements.
- 3) Element Lead Advisory Boards Exchange Draft Elements and Planning Board Reviews in Preparation for Public Information Session



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- a) Element Managers, Planning Staff Liaisons, Planning Board Liaisons, and Element Lead Advisory Boards highlight and summarize any inconsistencies between and/or among Elements and forwards to Planning Board.
- b) Planning Board accepts and reviews ideas from Element Managers, Planning Staff Liaisons, and Element Lead Advisory Boards on reconciliation of any inconsistencies identified during the preceding step. Any minor inconsistencies that can be reconciled to the satisfaction of the Element Lead Advisory Board are addressed.
- c) Check-in point with BOCC
- 4) Planning Board -- With Assistance from other Lead Advisory Boards -- Conducts Public Information Meeting(s) - Planning Board drafts agenda with input from other Lead Advisory Boards
- 5) Planning Board Develops Recommendations on Reconciliation of Any Remaining Inconsistencies between and/or among Elements and Forwards to BOCC and Element Lead Advisory Boards.
- 6) 2nd Public Hearing
 - a) BOCC holds public hearing.
 - b) BOCC conveys any required changes, including reconciliation of any remaining inconsistencies, to Element Managers and Lead Advisory Boards for incorporation into their respective sections of the draft text.
 - c) Planning Board provides recommendations to BOCC on entire Comprehensive Plan.
 - d) BOCC may also invite additional county advisory boards to provide recommendations on their respective Element.
 - e) BOCC adopts Comprehensive Plan.

END OF COMPREHENSIVE PLAN UPDATE

The following are to occur after completion of Comprehensive Plan Update:

- Implementation: Implementation consistent with process/guidelines adopted at 1st Public Hearing
- Evaluation and Update: According to process developed by the Planning Board during Phase I, Part 1 and later adopted by BOCC.



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FIGURE C-1: TIMETABLE FOR ORIGINAL BOCC APPROVED PROCESS

Comprehensive Plan Update Timetable
Revised 11/06/06

ATTACHMENT 1

Process Task	2006			2007												2008												2009	
	o	n	d	j	f	m	a	m	j	j	a	s	o	n	d	j	f	m	a	m	j	j	a	s	o	n	d	j	f
Phase 1																													
Adoption of Process	X																												
Contract with Consultant ("Meeting Facilitator")	X																												
Planning Board Framework and Guidelines			X	X																									
Joint Board Mtg.*			X																										
Planning Board Evaluation and Appraisal of 1981 Plan			X	X																									
Contract with Consultant ("Synthesizer")			X	X																									
Preparation of County Profile Element			X	X	X																								
Joint Board Mtg.*					X																								
Preparation of Goals						X	X																						
Approval of Legal Ad for Public Hearing								X																					
Outreach (not defined)									X																				
Qtr. Public Hearing-Evaluation & Appraisal of 1981 Plan, Goals, and County Profile Element										X																			
Advisory Board(s) Recommendation(s)											X																		
BOCC Adoption											X																		
Phase 2																													
Joint Board Mtg.*										X																			
Element Preparation										X	X	X	X	X															
Formating/Assembling Comprehensive Plan															X	X													
Advisory Boards Receive Draft Comprehensive Plan																X	X												
Outreach (not defined)																X													
Planning Board develops recommendations on any reconciliation																X													
Approval of Legal Ad for Public Hearing																X													
Expanded Advertisemen																	X												
Qtr. Public Hearing																	X												
Advisory Board(s) Recommendation(s)																		X	X										
BOCC Adoption																			X										
Qtr. Public Hearing to Adopt Regulatory Policies and Programs																												X	

*To include BOCC and Advisory Boards



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In 2007, the Orange County Board of County Commissioners approved an amendment to Phase II of the process. Below is an outline of the revised process followed by the revised timeline.

Orange County Comprehensive Plan Update Process - Phase II

As Amended by Board of County Commissioners (BOCC) on August 21, 2007

PHASE II, REMAINING ELEMENTS DEVELOPED:

- 1) Consultant Reconnaissance/Data Collection (July-Sept. '07)
 - a) Interview Element Managers and collect documents for synthesizing.
 - b) Identify any gaps in data or information and develop detailed draft table of contents for each Element.
 - c) Discuss and identify the specific roles and responsibilities of the consultant and Element Manager(s) for the creation of each respective Plan element. This will include an understanding of how the consultant will partner with the Element Manager(s) to prepare each respective draft Element.
- 2) Planning Board, Planning Staff, Meeting Facilitator, and Consultant Conduct Joint Advisory Boards Meeting to "Kick-off" Phase II by Reviewing Advisory Board Roles and Work Products to be Completed during this Phase (Oct. '07)
- 3) Consultant Meetings with Element Lead Advisory Boards (Max. of 7-meetings, Oct.-Nov. '07)

The Consultant will:

- a) Present a detailed draft Table of Contents for each Board's respective Element.
 - b) As a partner with Element Managers, convey gaps and recommendations for filling them.
 - c) Prepare a memorandum summarizing feedback provided by each Board and revise draft Tables of Contents as directed by Element Manager(s), taking advisory board feedback into consideration.
 - d) Convey ELABs preferences for filling gaps to Project Management Team.
- 4) Staff and Consultant Check-in Point with BOCC (Dec. '07)
 - 5) Consultant Meetings with Planning Board to provide updates, particularly on the Elements in which the Board



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- does not play a lead role (Max. of 3-meetings, Oct.-Nov. '07)
- 6) Consultant Formats/Assembles and Drafts Comprehensive Plan with Element Managers (Completed by end of Feb. '08)
 - a) Work with Element Managers to draft the Comprehensive Plan, including all Elements. The drafting of the Elements, including objectives to reach the adopted Goals, are prepared by the Consultant, or by the Element Manager and staff with assistance from the Consultant, working from adopted BOCC Principles, County Profile Element and Goals, detailed tables of contents (presented and revised during Step 3), previously identified studies and reports, and Element Lead Advisory Board discussions.
 - b) Consultant delivers copies of the Draft Comprehensive Plan to Element Managers for delivery to Element Lead Advisory Boards, supporting staff, and Contributing Departments for their review.
 - c) Within respective areas of expertise, Contributing Departments review pertinent sections of draft text for accuracy.
 - 7) With Element Managers, Consultant Presents Draft Comprehensive Plan to Element Lead Advisory Boards and makes revisions (Max. of 7-meetings, completed by mid-April 2008)
 - a) Advisory Boards will provide for appropriate public access and awareness using Comprehensive Plan website.
 - b) Each advisory board may review staff and advisory board reports and other pertinent documents such as Shaping Orange County's Future Report and Rural Character Study.
 - 8) Element Lead Advisory Boards and Planning Board Reviews Draft Plan in Preparation for Public Information Sessions (March-April '08)
 - a) Element Managers, Planning Staff Liaisons, Planning Board Liaisons, and Element Lead Advisory Boards highlight and summarize any inconsistencies between and/or among Elements and forwards to Planning Board.
 - b) Planning Board accepts and reviews ideas from Element Managers, Planning Staff Liaisons, and



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- Element Lead Advisory Boards on reconciliation of any inconsistencies identified during the preceding step. Any minor inconsistencies that can be reconciled to the satisfaction of the Element Lead Advisory Board are addressed.
- c) Staff and consultant check-in point with BOCC (early-March '08)
 - 9) Planning Board -- With Assistance from other Lead Advisory Boards -- Conducts Public Information Meeting(s) (April '08) - Planning Board drafts agenda with input from other Lead Advisory Boards.
 - 10) Staff and Consultant Check-in Point with BOCC for Legal-Ad Approval (April '08)
 - 11) Planning Board Develops Recommendations on Reconciliation of Any Remaining Inconsistencies between and/or among Elements and Forwards to BOCC, Element Lead Advisory Boards, and Consultant (April-May '08)
 - 12) 2nd Public Hearing and Plan Adoption
 - a) BOCC holds public hearing (May '08).
 - b) BOCC may convey any required changes, including reconciliation of any remaining inconsistencies, to Element Managers, Lead Advisory Boards, and Consultant for incorporation into their respective sections of the draft text.
 - c) Planning Board provides recommendations to BOCC on entire Comprehensive Plan.
 - d) BOCC may also invite additional county advisory boards to provide recommendations on their respective Element.
 - e) Staff makes final revisions to Comprehensive Plan as directed by BOCC.
 - f) BOCC adopts Comprehensive Plan.

END OF COMPREHENSIVE PLAN UPDATE

The following are to occur after completion of Comprehensive Plan Update:

- Implementation: Implementation, evaluation, and update consistent with process/guidelines included in adopted Comprehensive Plan.



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Orange County Comprehensive Plan Update Timetable, June - October 2008

Authorized by Board of County Commissioners (BOCC) June 10, 2008

1. June 3rd Letter from BOCC Chair to Mayors of Carrboro, Chapel Hill, Durham, Hillsborough, and Mebane inviting comments on draft Plan
2. June 4th Regular Planning Board Meeting (7:30 PM) – Review and develop draft Timetable
3. June 9th BOCC Legal Ad Abstract due for Aug. 25th Public Hearing
4. June 10th BOCC Work Session (Planning Board encouraged to attend) – Review and approve Timetable and comment on draft Comprehensive Plan
5. June 24th BOCC Legal Ad approval and Clarion Assoc. Contract extension to incorporate final revisions between Oct. 13 – Nov. 17th
6. July 9th Regular Planning Board Meeting (6:30-7:30 PM) – Review comments from June 10th BOCC Work Session, Element Lead Advisory Boards (ELAB), and the public and begin developing list of suggested revisions

ELABs and public are encouraged to submit any written comments for preliminary Planning Board review
7. Aug. 1st Requested deadline for any courtesy review comments (Carrboro, Chapel Hill, Durham, Hillsborough, and Mebane)
8. Aug. 6th Regular Planning Board Meeting (6:30-7:30 PM) – Continue review of comments, including any courtesy review comments received, and continue developing list of suggested revisions
9. Aug. 13th ELAB and public deadline to submit any written comments for inclusion in the Aug. 25th Public Hearing agenda packet
10. Aug. 25th 2nd Public Hearing on Draft Comprehensive Plan (Same Draft presented at May 19th Public Hearing)



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11. Sept. 3rd Regular Planning Board Meeting (6:30-7:30 PM) – Continue review of comments and development of list of suggested revisions
12. Sept. 10th Special Planning Board Meeting (6:30-9:00 PM) – Complete review, finalize list of suggested revisions, and develop recommendation to BOCC
13. Sept. 22nd Draft abstracts due for the Oct. 7th BOCC Meeting.
14. Oct. 7th BOCC receives Planning Board’s recommendation and list of suggested revisions and adopts Comprehensive Plan to include revisions or amends

Oct. 13th – Nov. 17th Clarion Assoc. incorporates final revisions and delivers hard copies and electronic files to the County