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Oelwein, IA
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Comprehensive Planning Proposal



An overview of planning and facilitation services for the completion of a Comprehensive Plan

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UERPC Organizational Information

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Upper Explorerland Regional Planning Commission (UERPC) is a council of governments that delivers a wide range of customized planning, advisory and resource development services to the incorporated and unincorporated areas of Northeast Iowa. Our service area includes the counties of Allamakee, Clayton, Fayette, Howard and Winneshiek. The Commission was formed in 1972 by the cities and counties in the region under Iowa Code Chapter 28H. Since that time, UERPC has successfully obtained over \$265 million in grant funds for the area and have facilitated many planning projects throughout the region.

The Commission’s goal has always been to provide our cities and counties with creative and practical consulting services at the most reasonable cost possible to enable our local governments to efficiently and effectively meet their goals and objectives. Because we are a governmental entity, we do not have to operate at a profit, compared to a private consulting firm. The goal of the Commission can be summarized by the text in Chapter 28H: “The Commission shall be the coordinating body for all units of government in the service area, an organization directed toward challenging problems of mutual interest and concern and providing a platform of information and coordination towards the solution of these problems.”

UERPC is managed by Executive Director Rachelle Howe and governed by a board of directors representative of the five-county region. Board members include:

Board Member:	Affiliation:	Board Member:	Affiliation:
Larry Schellhammer*	Allamakee County Sup.	Alison Holten	Howard County
Mary Koopman	Allamakee County Res	Pat Murray*	Howard County Sup.
Jack Knight	Allamakee County - USDA	Shirley Vermace*	Winneshiek County Sup.
Barb Collins	Monona Administrator	Alison Holten	Winneshiek County Res.
Patti Ruff*	Clayton Co. Zoning	Peggy Lensing	Winneshiek County Res.
Ray Peterson*	Clayton County Sup.	Nina Taylor	Winneshiek County Res.
Bonnie Basemann	Oelwein Clerk	Mark Vick	Winneshiek County Sup.
Marty Stanbrough*	Fayette County Sup.	Tim Lecander	Winneshiek County Res.
Roger Arthur	Fayette County		
Leon Griebenow	Fayette County Res.		
Dylan Mulfinger	Oelwein City Administrator		
Brett Devore	Oelwein Mayor		

*Executive Board

Comprehensive Planning Approach

Experience

UERPC has a long history of comprehensive planning, having completed plans for several communities in the region (e.g. Cresco, Waukon, Decorah, Guttenberg, etc.), as well as countywide plans for Winneshiek, Fayette, Allamakee, and Clayton Counties. Please visit the UERPC website to view a full list of communities and plans the organization has assisted with: <http://uerpc.org/comprehensive-planning.html>.

References

The following contacts can speak to strategic and comprehensive planning services Upper Explorerland has provided in the last year:

- Allamakee County – We recently oversaw and developed a complete comprehensive plan update for the County.
 - Larry Schellhammer, County Supervisor, 563-568-3522 lschellhammer@co.allamakee.ia.us
 - Val Reinke, Economic Development and Tourism Director, 563-419-0908 allamakeecountyedt@gmail.com
- City of Decorah – We recently facilitated a strategic goal setting process with the City Council, including a final report.
 - Travis Goedken, City Manager, 563-382-3651 citymanager@decorahia.org
 - Lorraine Borowski, Mayor, 563-382-3452 or 563-379-9909 mayor@decorahia.org
- City of Marquette – We are currently assisting the community with an update to their comprehensive plan.
 - Bonnie Basemann, City Clerk, 563-873-3735, marqcity@alpinecom.net

Planning Philosophy

UERPC’s planning philosophy is based on the importance of **a clearly defined planning need and process, stakeholder input, the sharing of knowledge and information to assist with priority setting, and attention to plan implementation**. Understanding the unique challenges and opportunities of each community is essential, and we make a point of engaging diverse and representative stakeholder groups to ensure a relevant product. Each plan should be a useful tool specifically designed to guide the city’s decision-making processes and ensure implementation of the goals, strategies and actions identified.

Planning Methods

Smart Planning Framework

A Comprehensive Plan is a broad document that studies and inventories the current and projected conditions within the community. It is a long-term document, typically looking out 10 – 20 years. UERPC follows Iowa’s Smart Planning Guidelines for comprehensive planning, which incorporate ten principles intended to produce economic opportunity, enhance environmental integrity, improve public health outcomes, safeguard quality of life and provide equitable decision-making. They include:

- Collaboration
- Efficiency, transparency and consistency
- Clean, renewable and efficient energy
- Occupational diversity
- Revitalization
- Housing diversity
- Community character
- Natural resource and agricultural protection
- Sustainable design
- Transportation diversity

Smart Planning Guidelines also identify 13 elements that may be included in a comprehensive plan. These elements serve as the basis for each chapter in the plan:

- Public Participation
- Issues and Opportunities
- Land Use
- Housing
- Public Infrastructure and Utilities
- Transportation
- Economic Development
- Agriculture and Natural Resources
- Community Facilities
- Community Character and Culture
- Hazards
- Intergovernmental Collaboration
- Implementation

Collaboration and Engagement

Collaboration is key to the comprehensive planning process. UERPC staff anticipates working in conjunction with a Steering Committee, Focus Groups, and city staff, officials and commissions:

Steering Committee – The planning process begins with the formation of a steering committee designed to engage representatives with diverse backgrounds and experience in local or regional social, political, financial, or cultural spheres. Active community members with a keen interest in the future of your community are also encouraged to get involved. And city staff and official representation on the committee is common as well. Steering committee members will provide ideas, information, and assistance to facilitate a robust planning process, give feedback on plan data and strategies, and participate in meetings in support of plan objectives.

Focus Groups – Focus groups comprised of Steering Committee members and knowledge experts meet in two-day, back-to-back sessions to review and discuss plan data. Focus groups help draw out key issues and opportunities based on their review of the research and community input, and their specific background or interest. This provides an essential step in moving from the data gathering phase to the goal setting phase of the planning process.

Comprehensive plans also require meaningful public input, which provides an opportunity to assess community needs and priorities, get the community buy-in essential to plan implementation, and to form partnerships and support for plan strategies. UERPC provides numerous public engagement opportunities, including:

Public Visioning Sessions – Two public visioning sessions are devoted to creating a community vision statement for the future, as well as focused vision statements for each smart planning element (e.g. economic development, housing, transportation). These sessions are interactive and fun, encouraging participants to complete an “appreciative inquiry” process to discover values and assets in their community, and dream of (create a vision for) the future.

Community Survey – A community survey will be created with the assistance of the Steering Committee and city staff. The survey will be electronic, with hard copy option, and designed to gather general information about the community (e.g. demographics, residency, etc.), as well as preferences and opinions relevant to the smart plan process. Survey Monkey or ArcGIS Survey123 survey tools will be employed in the creation of the survey. These platforms create simple, user-friendly surveys, and a means for easily summarizing and visualizing survey results.

Think Tank Sessions - Two public think tank sessions will be held to design goals, strategies and actions that will help the community work toward their vision for each plan element. Applicable data and information will be shared with participants so that they can make informed suggestions and plans for the future. These sessions are intensive, and typically involve small and large group work to draft and finalize recommendations for community strategies.

Public Open House – A public open house will be provided to present final plan information, including vision statements, community survey results, synthesis of relevant data, goals and actions, and other visual aids. The open house will be an opportunity for city staff and officials, Steering Committee members, and planners to chat with public attendees about the plan process and outcome. Public feedback forms or posters will be provided and assessed prior to plan finalization. A draft of the plan will also be noticed and provided for public review.

Based on the scope of services solidified with the City of Oelwein, planning services could be further expanded to serve community needs, such as designing opportunities to engage specific community groups (e.g. schools, business and development groups, etc.), or to provide additional engagement mechanisms, such as brainstorming tours, stakeholder interviews, and design-oriented planning assistance.

Technology and Presentation

UERPC planners employ a variety of tools to gather, analyze and communicate plan information. In addition to basic spreadsheet and word processing programs, UERPC employs Geographic Information Systems (ArcGIS Pro) for mapping and data analysis, Adobe Photoshop and Illustrator for visualization of information and creation of graphics, and Microsoft Power Point for final plan formatting and sharing. All meetings will provide a virtual attendance and engagement option.

UERC is moving towards the creation of succinct, visual-heavy, and user-friendly plan formats. To avoid the “plan on the shelf” phenomenon, we encourage communities to create a targeted, versus sprawling, plan, that can be easily shared and discussed with city representatives and community stakeholders.

Based on local desire, the scope of work for planning services can be expanded to include further visual analysis or concept design, such as plans, elevations, sections and illustrative graphics. These can serve to communicate desired best practices or identify concepts for treatments of downtown areas, community parks and facilities, neighborhood areas, and more. These additional design services are in addition to the basic plan proposal.

Communication and Outreach

Outreach and communication about the planning project occur via a plan webpage (hosted on the UERPC website and shared via partner websites), social media outreach in coordination with plan partners, email list serves and communications, press releases and public notices, and hard copy materials and distribution (e.g. posters, flyers, newsletters/bill distribution, postcards, etc.). Public input methods are noticed and provided on the plan webpage. Public outreach strategies are discussed with

city staff and Steering Committee members at the outset of the project to establish best mechanisms for local outreach, which varies by community.

Deliverables

UERPC works with the community to produce a Comprehensive Plan. Standard deliverables include printed and electronic copies of the Final Comprehensive Plan and a large-scale future land use map. UERPC provides all necessary materials and copies for meetings. Additional small or large scale printed materials can be arranged upon request of the community.

Technical Qualifications for Professional Personnel

Employees who will be assisting with the comprehensive planning project include Michelle Barness, Regional Planner and Aaron Detter AICP, Senior Transportation Planner. These individuals have combined educational credentials and practical expertise in many areas including community and regional planning, economic development, transportation planning, hazard mitigation planning, strategic planning, GIS applications, landscape architecture, and grant writing. Bios follow:

Michelle Barness (Project Lead) has a Bachelor of Arts degree in Environmental Studies from Luther College and a Master of Landscape Architecture degree from the University of Minnesota. She has worked for UERPC since May of 2016 as a Regional Planner. Michelle’s responsibilities include community smart planning, strategic planning, regional planning projects, transportation planning, hazard mitigation planning, city code updates, GIS mapping and analysis, landscape architecture site planning and concept design, and grant writing. Prior to her employment at UERPC Michelle worked as a Community Planner and Graduate Landscape Architect for NAC, Inc., a planning consulting firm in the Twin Cities Area, served as an Adjunct Assistant Professor of Landscape Architecture at the University of Minnesota, and was a Research Fellow with the University of Minnesota’s Metropolitan Design Center.

Aaron Detter, AICP, has a Bachelor of Art degree from the University of Nebraska at Omaha and a Master of Regional Planning degree from the University at Albany – State University of New York. He is certified by the American Institute of Certified Planners (AICP) and has nine years of professional planning experience. He worked as an Urban and Regional Planner – Advanced for the New Mexico Department of Transportation for more than three years, where he performed diverse transportation planning functions related to all modes of transportation, with a particular focus on bicycle and pedestrian safety and planning. He then worked as a Community Planner for Santa Fe County before coming to Iowa, where he has five years of COG planning experience. At UERPC, Aaron is involved with multi-county regional transportation planning, comprehensive planning, housing studies, geographic information systems (GIS) mapping and analysis, as well as other diverse planning services that meet the needs of the region’s communities.

Planning Schedule and Fees

The **Scope of Services** identifying planning phases, activities and estimated fees are attached. In addition, the attached **Planning Toolkit** provides descriptions of planning methods and additional planning tools for consideration. Fee estimates can be further amended to reflect each community’s desired planning objectives and financial ability.

COMPREHENSIVE PLAN SCOPE OF SERVICES

Phase One: Organization and Community Visioning (May – June 2022)

A meeting will be held with a community **Steering Committee** to develop community outreach methodology and logistics for the planning process, and to establish Focus Groups that will later assist in gathering and reviewing plan information. A **Community survey** will be developed and distributed. Two public **Visioning Sessions** will be devoted to identifying strengths and values within the community and creating a community vision statement for the future. Focused vision statements will also be created for each plan element.

Phase Two: Collection of Background Data (July – August 2022)

Data and background information for each element will be collected for inclusion in the plan. GIS mapping will begin for land use maps and others as required. **Focus group** meetings will be held to review and discuss plan data.

Phase Three: Setting Goals and Actions (September 2022)

Two **Public Think Tanks** will be held to design goals, strategies and actions that will help the community work toward their vision for each plan element. Applicable data and information will be shared with participants so that they can make informed suggestions and plans for the future.

Phase Four: Plan Finalization (October 2022)

UERPC will compile data, maps and other background information and the goals, strategies and actions into a draft document. A final meeting with the steering committee will be held to review the draft for needed adjustments. A **Public Open House** will be provided to share final plan information and provide an opportunity for questions and conversations from the public.

Phase Five: Final Public Review and Adoption (November – Dec. 2022)

Plan will be placed on UERPC and the City’s website for final comment opportunities from the public. The plan will be reviewed with the Planning Commission, and a public hearing/adoption will be held with the Council.

Cost for full plan: \$16,050

Work Activity:	Cost per Activity:
2 Admin meetings w/staff (2 hr. mtgs, 1 staff - 1 kick-off, 1 check-in)	\$220
2 Public Visioning Sessions (2 hr. session, 2 staff)	\$440
Meeting Prep, Data and Information Collection, Surveys, Mapping, Writing	\$12,000
Printing - maps and documents	\$300
2 Public Think Tank Meetings (2 hr. each mtg, 2 staff per mtg)	\$440
6 Focus Group Meetings (2 hr. per mtg, 2 staff per mtg, 2 trips w/3 consecutive meetings per trip)	\$1,320
2 Steering Committee Meetings (2 hr. sessions, 1 staff per mtg)	\$220
1 Public Open House (2 hr. session, 2 staff)	\$440
1 Planning and Zoning Commission Review Meeting (2 hrs., 1 staff)	\$110
1 Final Public Hearing and Council Adoption (2 hrs., 1 staff)	\$110
Travel time and mileage (10 trips)	\$450
Total:	\$16,050

A fee estimate can be provided for staff time and resources to include additional planning options as requested based on an hourly technical rate (see attached “Planning Toolkit” for examples)

Planning Toolkit: Gathering Broad Public Input

Visioning Sessions

Brainstorming sessions to ID issues & aspirations from the public. Participants complete exercises to provide insight on where a community should be headed, what values its citizens find important, & what kind of future they hope to create.



Community Surveys

Online, user-friendly surveys are targeted to a diverse set of stakeholders & distributed via printed postcards & electronic means.

They assist in obtaining input from a broad cross-section of the community, require less time commitment than a meeting, & can provide cities & planners with clarity regarding gathered data.

Special Event Booths

Tables at public events to help disseminate a community survey or get input on a community's vision & goals; another method for obtaining input from a broad cross-section of the community.



Think Tank Meetings

Public participants discuss & provide recommendations on draft goals, strategies & actions designed to guide a community in attaining its vision. Plan data is provided for review.

Planning Toolkit: Focused Engagement

Steering Committees

Committees tasked with guiding the planning process, comprised of individuals whose background, expertise or interest assist in developing a well-rounded plan. They are diverse groups including a variety of stakeholders and community leaders.



Focus Groups

Groups formed by geographic area or by interest group affiliation. They participate in small group meetings aimed at generating discussion, goals and consensus. By grouping persons with like interests it is possible to gain accumulated knowledge and perspective for plan themes.



Brainstorming Tours

Engage plan partners or participants in a tour of successful development sites, buildings, commercial districts, public facilities, redevelopment projects, public amenities & more to inform action setting.

Site Planning & Design

Analysis, planning and design for targeted areas of a community (e.g. downtown plans, park & trail plans, redevelopment sites, streetscape design, etc.). Related graphics and plans.

