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PRACTICE BETTER SITE VISITS



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Site Visits: Purpose, Planning, and Practice

By Stuart Meck, FAICP

When a developer or property owner submits a proposal for a new development to a government, it is standard practice for professional planners to conduct a site visit.

A site visit's purpose is to obtain current, first-hand knowledge of the site and surrounding properties for eventual incorporation into a staff report. The report includes a recommendation (see "Formatting and Writing the Staff Report," November 2004). The conditions affecting each development are unique, and professional planners must account for them in determining whether planning policies and approval standards and criteria are satisfied. Even if a planner made previous visits to a site, changed conditions and the dimming of memory make a new visit for a new proposal an imperative.

This issue of Zoning Practice addresses how to conduct these visits. The first section discusses measuring tools, technology, clothing, and other appropriate and necessary accessories to take to the site. The second section contains descriptions and a rationale for recording various site characteristics, including land uses on the site and in the surrounding area, topography and vegetation, building condition, views, verification of visible infrastructure, and more.

PURPOSE AND PREPARATION

Site visits have at least three purposes:

- Verifying conditions on the site and the accuracy of information submitted as part of the required application package, such as that for a rezoning, variance, conditional use, or subdivision;
- Describing the surrounding area, especially the potential for land-use conflicts; and
- Identifying or investigating special site or area conditions, especially those that could merit more detailed analyses or present opportunities to carry out policies or proposals in local plans.

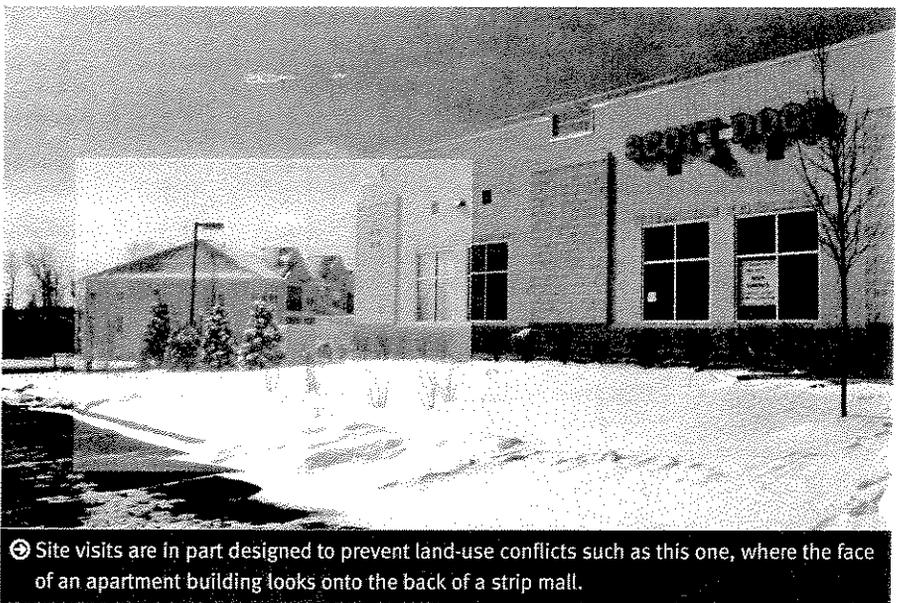
To prepare for the site visit, the planner should have base maps of an appropriate scale on which to take notes on the site and surrounding area. The maps should be on a clipboard or similar firm surface. The scale of the base map will depend on the extent of the proposal, but one inch=100 feet is a workable scale on which to write. In addition, the planner should have excerpts from local utility maps showing water and sewer lines in the area and a recent aerial photo to help identify natural and manmade features not easily visible from property boundaries.

Because it is sometimes necessary to establish or verify distances, the planner should have a long, nonmetallic tape measure on a reel. Measuring devices that track distance using a small wheel on the end of a metal pole are helpful. Both are available

from suppliers of surveying equipment. A handheld compass will also be useful.

Keep in mind, site visits call for durable clothing designed to prevent potential damage from vegetation snags and other assaults by Mother Nature. Boots are also recommended if the terrain is difficult or wet, and a hard hat is absolutely necessary if construction is underway. A tape recorder is valuable for dictating field notes. Finally, angry dogs are an occasional hazard, so planners should carry an animal repellent as a precaution.

When making several site visits in one day in a large county or city, planners should map the locations first, proceeding in a clockwise route to prevent backtracking. Schedule site visits when traffic is lightest and carry identification from the local government in case property owners question the purpose of the visit.



All photos by Michael Davidson

⊕ Site visits are in part designed to prevent land-use conflicts such as this one, where the face of an apartment building looks onto the back of a strip mall.

ASK THE AUTHOR JOIN US ONLINE!

From April 18 to 29, go online to participate in our "Ask the Author" forum, an interactive feature of *Zoning Practice*. Stuart Meck, FAICP, will be available to answer your questions about this article. Go to the APA website at www.planning.org and follow the links to the Ask the Author section. From there, just submit your questions about the article using an e-mail link. The author will reply, posting the answers cumulatively on the website for the benefit of all subscribers. This feature will be available for selected issues of *Zoning Practice* at announced times. After each online discussion is closed, the answers will be saved in an online archive available through the APA *Zoning Practice* web pages.

About the Author

Stuart Meck, FAICP, is a senior research fellow in APA's research department.

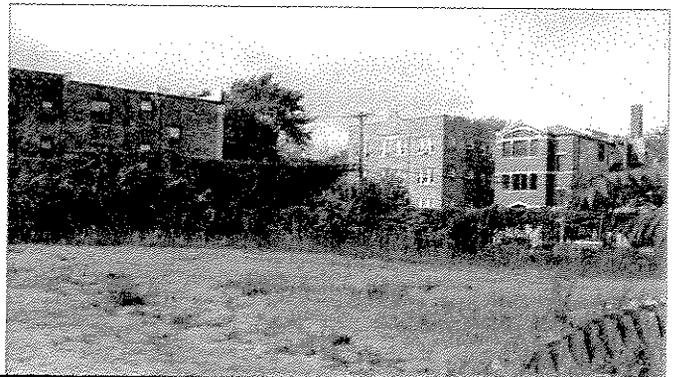
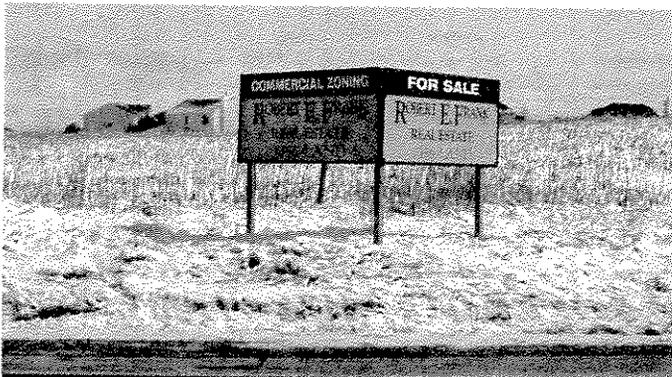
In determining the boundaries of the site visit, planners should consider the conditions surrounding the site in the area required for public notice, which sometimes are properties

next section includes general items for planners to record during a site visit.

Existing land uses on the site and in the surrounding area. The American Planning

sions allow users to have precise control over land-use classifications.

The planner should map land uses using symbols such as "1-F" for single-family resi-



Site visits require more than knowledge of site characteristics, such as topography or surrounding buildings; the sites in these pictures could require preparation for encounters with rugged terrain, inclement weather, unruly neighbors, and even rats or dogs.

immediately adjoining and confronting the site. Some communities require that for variance, conditional use, subdivision approval, and other special land-use permit applications, notification must be by mail to all parcels within 100 to 500 feet of the outer boundary of the site or a certain number of parcels nearest to the land subject to the application, whichever is the greatest number of parcels. For facilities serving part of a region, such as shopping centers, a larger analysis area is sometimes necessary to achieve a big-picture context.

WHAT TO RECORD

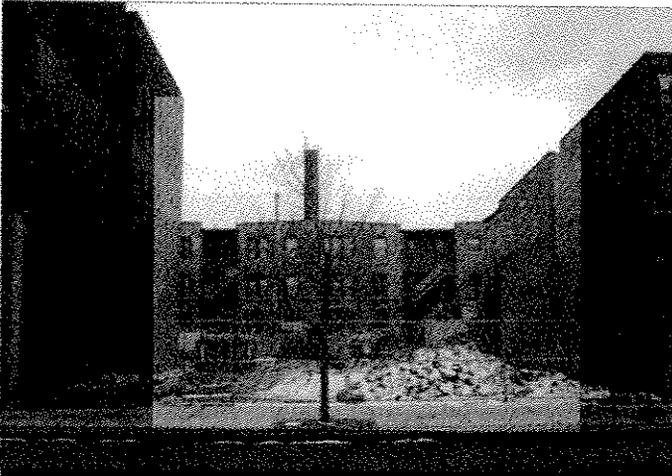
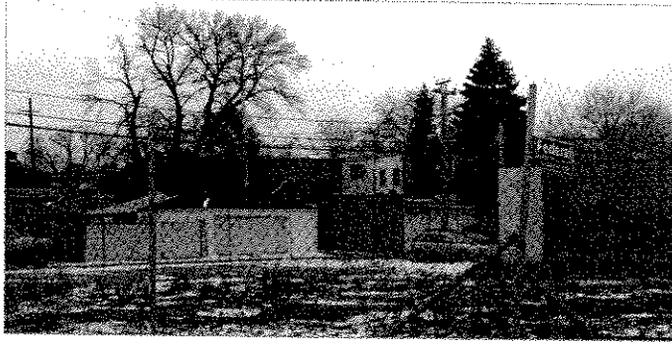
Local development regulations typically identify a number of factors to address during the development review process, which the planner should determine before the site visit. The

Association's Land-Based Classification Standards, found on the APA website at www.planning.org/lbcs/, is a classification system that uniformly portrays land uses (see sidebar on page 5). This system updates the Standard Land-Use Coding Manual, published jointly in 1965 by the Federal Bureau of Public Roads and the Urban Renewal Administration, which, for many years, provided the standard approach for characterizing land uses.

LBCS provides a consistent model for classifying land uses based on certain characteristics. The model extends the notion of classifying land uses by refining traditional use categories into multiple dimensions, such as activities, functions, building types, site development character, and ownership constraints. Each dimension has a set of categories and subcategories. Multiple dimen-

ences, "2-F" for duplexes, "C" for commercial or retail uses, "I" for industrial uses, "Inst." for institutional uses, and so forth. Field notes can provide detailed information about individual uses for incorporation into the written report. Digital photographs of the site are useful in the report or in a PowerPoint presentation to the reviewing body. Take the photos from several vantage points: facing into the site from the north, south, east, and west of the property.

Topography and vegetation. Topography, vegetation, and other natural features are subsets of site development character. They are important in terms of the value for preservation and reinforcement versus alteration or removal. The planner should walk the site, and using a contour map, assess the character of its natural features as part of the site notes. The planner should consult floodplain



⊕ It takes knowledge, experience, and good development policy to envision and plan for the best future land use for a site. Top left; bottom right: Will future development of these urban lots work well with surrounding properties? Top right; bottom left: When finished, this mixed-use residential development in Chicago will include ground-floor retail, an essential development characteristic of this prosperous neighborhood commercial district.

maps to determine whether there is a floodplain on the site. The level of detail does not need to be the same as if the planner were developing a site plan for the project, but must be sufficient enough to relate its character to a lay audience. The planner should also describe the general slope of the site, as well as any special features such as ridge lines, areas of steep slopes, permanent bodies of standing or moving water, drainage patterns (e.g., “the site drains to the northwest”), or wetlands. Include a general description of vegetation as well (e.g., the site is “heavily wooded” or “the site is presently used for corn production”). It is important to also note significant stands of trees (type and size) if the applicant has not already done so. The site investigation might also document instances of problems on the site or adjoining it, such as standing water that could indicate drainage problems. Sometimes, sites will contain natural boundaries that have the potential to serve as buffers between properties,

including a row of tall trees, or terrain that, if left in its natural state, would serve to divide the site into different use areas.

Age, condition, and character of buildings; presence of historic buildings. The site notes should describe the type and character



⊕ Planners must note the presence natural features when conducting site visits. The suburban homes in this photograph are on higher terrain, stopping short of substantial wetlands in the foreground.

of the buildings on the site and its vicinity. For example, the planner could note that the area to the north consists of “one-story, single-family homes, 10 to 20 years old, and in moderate repair” and describe the area to the south as “new, three-story professional office buildings in good condition.” The architectural character of buildings may be an issue if the staff report concerns an application for historic preservation or design review, or if there are nearby buildings that either have local historic significance or are on the National Register of Historic Places. Architectural character deals with issues of style for construction, roof form, fenestration, building height, building ornamentation (e.g., cornices), and entryway placement. Buildings may also have significance because they figured prominently in local history. In these cases, the planner may need to consult historic building inventories or request assistance from the state historic preservation office if architectural expertise is not available on the planning staff or within the local government.

The location of buildings on the site can be an important issue for variances. For example, the applicant may wish to add a room onto a building that potentially projects into a required front, side, or rear yard. In such cases, the precise distance between the building and the setback line becomes critical (e.g., the difference between a building that is exactly on a side yard setback line or one that projects 0.5 feet into the setback area). Therefore, it is desirable to ask the applicant to have a surveyor plot distances from lot lines to setback lines, and from setback lines to proposed building locations, to determine whether the variance is necessary or, alternately, whether the building design could be modified to eliminate the need for the variance.

Views. When a site offers significant views (overlooking a city or lake), it is possible for the applicant to request a change that could potentially impair those views. If the local government has some discretion in the height and placement of buildings on the site (as in a planned unit development), it is appropriate to document views in the site analysis. Officials may recommend that the building design or footprint be altered to protect the views. It is worthwhile to note that modern geographic information systems (GIS) also allow the depiction of viewsheds, using built-in GIS functions.

WHAT IS THE LAND-BASED CLASSIFICATION SYSTEM?

LBCS is designed for use with modern geographic information systems. The APA website (www.planning.org/lbcs/) contains downloadable templates for use with such systems. Classifying land uses across multiple dimensions in database terms means adding new fields to the land-use database. The total number of land-use fields in the database should equal the number of dimensions. Every record in the database is classified in not just one land-use field, but in several—one for each dimension. The number of dimensions, in turn, depends on the purpose of the data. When the purpose of the data changes, dimensions are added or dropped as needed.

In local planning, LBCS calls for classifying land uses in the dimensions of activity, function, structure type, site development character, and ownership.

- **Activity.** This refers to the use of land based on observable characteristics. Activity describes what occurs in physical or observable terms (e.g., farming, shopping, manufacturing, vehicular movement, etc.). An office activity, for example, refers only to the physical activity on the premises, which could apply equally to a law firm, nonprofit institution, courthouse, corporate office, or any office use. Similarly, residential uses in single-family dwellings, multifamily structures, manufactured houses, or any type of building, are classified as residential activity under LBCS.
- **Function.** This refers to the economic function or type of establishment using the land. It is possible to characterize every land use by the type of establishment it serves. Land-use terms, including “agricultural,” “commercial,” and “industrial,” relate to enterprises. The economic function served by the land use gets classified in this dimension and is independent of activity on the land. Establishments can have a variety of activities on their premises yet serve a single function. For example, two parcels are said to be in the same functional category if they belong to the same establishment, even if one is an office building and the other is a factory.
- **Structure type.** This refers to the structure or building type on the land. Land-use terms embody a structural or building characteristic, suggesting the utility of the space (in a building) or land (when there is no building). Land-use terms, such as “single-family house,” “office building,” “warehouse,” “hospital building,” or “highway,” also describe structural characteristics. Although many activities and functions are closely associated with certain structures, it is not always so. Many buildings are often adapted for uses other than the original use. For example, a single-family residential structure can become an office use.
- **Site development character.** This refers to the overall physical development character of the land. Site development character describes what is on the land in general, physical terms. For most land uses, site development character is expressed in terms of whether or not the site is developed. Still, not all sites without observable development can be treated as undeveloped. Land uses such as parks and open space, which often host a complex mix of activities, functions, and structures, need categories independent of other dimensions. This dimension uses categories that describe overall site development characteristics but not characteristics such as slope, drainage, or soil type.
- **Ownership.** This refers to the relationship between the use and its land rights. Since the function of most land uses is either public or private (and not both), distinguishing ownership characteristics appears obvious. However, relying solely on functional character may obscure such uses as private parks, public theaters, private stadiums, private prisons, and uses of mixed public-private ownership. Moreover, easements and similar legal devices also limit or constrain land-use activities and functions. This dimension allows classifying ownership characteristics more accurately. Obviously, the site survey alone will not disclose ownership, and ownership is not a critical element of this type of review. Nonetheless, some aspects of ownership, such as the location of conservation or utility easements, may be important in some development review situations.

Verification of visible infrastructure.

These public facilities include fire hydrants, lighting, elements of street character (type, lanes, and existence of curbs, gutters, and sidewalks), traffic signals, and other visible infrastructure. Much of this information is available from municipal public works and utility departments. Nonetheless, the site notes should describe the nature of public facilities in the area, particularly in the immediate vicinity of the site. For example, if the development permit application is for a subdivision it is important to know whether sidewalks about the site and whether to continue them through the new plat.



⊕ Before redevelopment of the former “Deep End Tavern and Grill” site, a site visit will identify existing infrastructure, including a parking lot and driveway (under the snow), aboveground and belowground utilities, and, of course, the sign.

Circulation issues and parking. Circulation refers to patterns of vehicular or pedestrian traffic in the neighborhood. The site notes should identify nearby land uses that serve as significant destinations or origins of vehicular traffic. If a pedestrian movement pattern is considered valuable and the local government’s planning policies call for its preservation and enhancement, the site notes should indicate ways to improve or optimize the existing pattern. In addition, the site notes should identify the location of public transit routes or stops at or near the site. In some cases, particularly in dense urban neighborhoods, the notes should discuss the nature and degree of onsite parking. Finally, the planner should identify the locations of driveways on properties near or

facing the site in order to determine and evaluate locations for new driveways.

Other factors. These could include identification of the location, generator, schedule, and intensity of significant odors, smoke, or other airborne pollution, or the presence of noise, from traffic or fixed sources.

Planners should transcribe site visit notes quickly to include them in the staff report but still allow enough time to return to the site before completing the report should other issues surface. Site notes can also be an overlay in a GIS. Site visits at dif-

ferent times of the day are recommended to assess time-sensitive conditions such as traffic or pedestrian flow. Planners may also need to take traffic counts in order to conduct traffic impact analyses that rely on a description of existing traffic movements and volumes at peak periods.

A site visit is a form of “ground truth” that adds credibility to a planner’s advice. A thorough site visit can add to a planner’s effectiveness, and enhance the decision making of the planning and governing bodies that a planner advises. The techniques for site visits are not complex, but still require careful preparation and documentation so the staff recommendation on a development proposal is a solid and well-informed one.



NEWS BRIEFS

PAPER SUBDIVISIONS: GROWTH MANAGEMENT FOR PROFIT

By Sarah K. Wiebenson

Commissioners in Charlotte County, Florida, recently adopted changes to a 2001 transfer of development rights (TDR) ordinance that makes it more responsive to local developers’ concerns and more profitable for property owners located outside the county’s designated urban service areas.

The 2001 ordinance sought to “sever” the development rights and associated residential densities from land with environmental, historical, or archaeological significance, while transferring these rights to receiving zones within the urban service areas. Development rights could also be obtained in exchange for payment into the county’s land acquisition trust fund.

Developers in Charlotte County complained that the TDR ordinance was burdensome and that it was enacted with little public input. In response, county commissioners drafted new language to allow additional landowners to transfer development rights at a rate of one unit per ten acres of agricultural property or one unit per one-quarter-acre pre-platted residential lot. As reported in the Sarasota Herald-Tribune, this signals a boon to property owners in the county, giving rise to the phenomenon of “paper subdivisions.” Says one member of the county’s agriculture and natural resources advisory committee, “It’s like harvesting the density rights off his property. He sees it as a crop.”

Florida has historically been home to speculative “ghost subdivisions,” which, if developed, could pose significant growth management challenges in the areas most affected by this practice. Charlotte County is a state leader, with 174,000 one-quarter-acre platted residential lots, most of which remain undeveloped.

The new Charlotte County TDR language addresses this abundance of growth potential while co-modifying the prohibition against development, thus satisfying the concerns of developers and mollifying additional landowners outside the urban service areas. A member of the Charlotte County comprehensive planning division admits that their original goal to use the TDR provisions to cap and reduce future growth has been reduced to merely capping development potential. However, the 2001 provisions were adopted in the eleventh hour and may have contained more restrictions than necessary.

This change may indicate a growing movement to make growth management provisions enacted in recent years more amenable to market forces. In a recent Oregon ballot initiative, residents voted to force local governments to choose between waiving development restrictions that negatively affect land values or reimbursing property owners for lost value. Property rights advocates in other states, including Washington, also indicate interest in pursuing such measures.

A copy of the Charlotte County, Florida, transfer of development rights ordinance is available to Zoning Practice subscribers by contacting Michael Davidson, editor, Zoning Practice, at American Planning Association, 122 South Michigan Avenue, Suite 1600, Chicago, IL, 60603, or by sending an e-mail to mdavidson@planning.org. Sarah K. Wiebenson is a researcher with the American Planning Association

PARKING ACCOMMODATIONS FOR SUVs

By Josh Edwards

According to the National Parking Association, the average size of light trucks and sport utility vehicles is steadily rising. Americans are buying more new SUVs and heavy-duty pickups than passenger cars, the size of which remains relatively constant. Also, sale of larger SUV models is outpacing those of "small" SUVs. This means that not only are SUVs purchased in greater numbers today than in the past, but Americans are now choosing the biggest of the big vehicles.

The prevalence and size of SUVs has serious planning implications, particularly concerning their effects on public facilities. SUVs and other oversized vehicles are often too large to fit conveniently and comfortably into the built environment around them. Because of this, communities have started to examine their effects on parking facilities.

Though SUVs were traditionally designed to navigate through mountainous terrain, such movement is difficult (if not impossible) in concrete suburban parking garages. For example, the ceiling of a municipal garage in Walnut Creek, California, constructed in the early 1990s, was too low to allow late-model, bigger SUVs to reach the upper floors. After noticing a growing number of incidents where oversized vehicles would strike ceiling beams and support columns, city officials designated two rows of spaces on the ground floor specifically for oversized vehicles. Today, the garage's SUV parking area accounts for approximately 20 of the 540 total garage

spaces. This section is restricted to vehicles of at least six feet, five inches in height, which are generally SUVs or full-size vans. Shorter vehicles parking in these spaces are ticketed just as large vehicles would be in compact spaces. Meter readers carry six-foot, five-inch measuring sticks to assist them.

Rinta Perkins, assistant engineer for Walnut Creek, says public feedback is mostly positive, but there are still too few parking spaces for SUVs. The garage is located in a busy area and SUV-only parking fills quickly. Once the section for SUVs is fully occupied, other SUVs cannot park in the garage. Many residents would like the city to add more SUV-only parking, says Perkins.

The width and length of many light trucks makes parking in standard-size spaces difficult. Vehicle height does not provide as great of difficulty. Standard parking spaces are typically seven feet, six inches wide and 15 feet long. Large SUVs and other light trucks are often larger. For example, the Lincoln Navigator is 17 feet, two inches and the Ford Excursion is 18 feet, nine inches long. The width of many light trucks is roughly six feet, six inches.

Palo Alto, California, passed a law in 1999 limiting vehicle dimension in public parking lots to a maximum width of six feet and a length of 15 feet. The law also penalizes drivers who fail to park between parking space lines. Any vehicle (large or small) taking up two spaces or parking over the painted lines is ticketed. Palo Alto traffic sergeant Steve Herrera says the law is successful. He says tickets are issued on a case-by-case basis, often as a result of telephone complaints that an SUV is parked in a compact space. Though some may feel the law unfairly targets SUV owners, Herrera says, the intent is to thwart "lazy" parkers and to maximize the efficiency of city parking lots.

Walnut Creek and Palo Alto address SUV size issues through measures that both accommodate and restrict. Though these California communities found reasonably agreeable solutions, should planners nationwide consider SUV-only parking? Perhaps this would relieve drivers in passenger cars from the stresses of navigating around large SUVs in tight parking areas. Also, would planning accommodations such as those in the California examples actually encourage the sale of energy-consuming SUVs? Rather than reactionary police enforcement measures, planners should instead reconsider the dimensions cited in local parking standards as a potential solution. Enlarging

parking spaces by one foot in both length and width would accommodate large vehicles more easily, but it would also call for more pavement to accommodate the same number of vehicles. For private interests, such as shopping center tenants, one solution is to limit SUV-only parking to a portion of a lot, or allow it in specified districts. Larger spaces would result in an increased cost per space for the development of new parking lots. Likewise, existing lots that are re-striped for larger vehicles would yield fewer customers from fewer parking spaces.

The popularity of SUVs and heavy-duty pickups will likely continue, despite economic and environmental concerns coming from a variety of environmental and planning organizations, scientific institutions, and political constituencies. As consumer purchases of SUVs climb to new heights, it stands to reason that demand for SUV-only parking could follow suit. Barring a reversal in American automobile tastes, planners and elected officials across the country will undoubtedly be forced to ask the questions posed here. Josh Edwards is a researcher with the American Planning Association

Cover photo: Former agricultural land poised for development in Lake County, Illinois, a rapidly growing suburban county north of Chicago. New subdivisions in the distance.

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