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MEMORANDUM TO: Members of the Plan Implementation Committee

FROM: Donna Rendeiro

RE: Recommendation: Changes to the Municipal Self Assessments Template/Guidelines

DATE: February 25, 2020

As you will recall, a primary goal of the Office is to update the Plan Endorsement Process with a goal toward simplification and ease of compliance without compromising good planning practices. One of the first steps toward that goal is to revise at the Municipal Self Assessment Guidelines that are currently in place toward accomplishing a more streamlined approach to this step.

I am therefore asking for your consideration regarding the proposed new guidelines. I have attached a summary of changes as well as a draft guidelines document for your review. Both Meghan Wren and I will present the documents for your review at the Plan Implementation Committee meeting on February 26th, and we will be prepared to discuss any concerns or questions you may have.

Thanks!

c: State Planning Commission Members

PLAN ENDORSEMENT MUNICIPAL SELF ASSESSMENT REPORT (MSA) GUIDELINES (Produced by OPA February 2020)

A NOTE FOR THE USER

This template serves to:

- Inform petitioners what information OPA is seeking to determine consistency;
- Summarize planning status and identify gaps; and
- Demonstrate how plans are consistent with the State Plan.

These are organized as the petitioner's cover report should be organized, allowing the petitioner to directly replace instructions with actual report contents. When preparing your report, please remove instruction notes or unused tables from the template. The narrative in this report should be supported by references to external documents, with specific document and page references. Such references should be provided throughout the document as necessary and especially in the "Consistency with State Plan" sections.

Also, when submitting to Office of Planning Advocacy please include:

1. **Proof of public notice** (affidavit of publication) for all required public meetings;
2. A **certified resolution** from the governing body approving the Self-Assessment Report; and
3. **Meeting minutes** of the public meeting(s) at which the Self-Assessment Report and its findings & conclusions was reviewed and adopted including a summary of public comments and copies of written comments filed before or during the public meeting.

*For petitioners representing a **special resource area**, specific reference shall be made to identify and evaluate planning efforts made specifically to provide for **protection of the special resource area**; and*

Should a municipality be requesting a waiver, waivers when appropriate may be granted by the Director of the Office of Planning Advocacy for items other than Community Visioning, Municipal Self Assessment and Public Participation which can be waived by the SPC. **(per Rule, DEP added.)**

Alternate language from Liz – maybe better... Plan Endorsement requirements can be waived given documentation of substantial cause based on regulatory requirements.

If portion of municipality is in the Highlands, Pinelands or Sports & Exposition Authority (Meadowlands) their MSA should only contain data for that area outside of the special resources area.

Additional information may be sought by State Agencies in the capacity and constraints review and other steps of Plan Endorsement.

The petitioner is welcome at any time to contact OPA for guidance on the preparation of this report.

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INTRODUCTION

The petitioner could format the Introduction to fit its needs and those of the document's various audiences at the local level, especially the governing body, planning board and general public.

The Introduction should describe why the petitioner is undertaking the Plan Endorsement process. This discussion should include a brief discussion of the following:

- Local goals and objectives, and how they are consistent with the State Plan;
- Relevant planning issues that Plan Endorsement could help address (e.g. rapid development, economic revitalization, natural and cultural resource protection, regulatory issues, infrastructure needs);
- Assistance from state agencies that the petitioner will need to implement its plans.
- A summary of efforts related to Plan Endorsement requirements (to be discussed in more detail in later sections).
- A summary of requested planning area and center boundary changes.
- Identify any waivers sought with justification

While there may be a primary driving issue for the petitioner's interest in Plan Endorsement, it must be considered from a broader planning perspective. It needs to be linked to infrastructure and resource capacity, address the balance of commercial and residential development, and fit in a good design context.

EXISTING CONDITIONS/OPPORTUNITIES & CHALLENGES

Location & Regional Context

The report should describe the general location and context of the community, including significant manmade or natural features (e.g. roads, parks, and rivers), bordering municipalities, and any regional jurisdiction (e.g. Pinelands, Highlands, Meadowlands, CAFRA).

Background

This section should provide an introduction comprising a brief background of local demographics and conditions; how it compares to that of the county and state, highlighting key data that indicates opportunities and/or challenges unique to the community. In this regard, the petitioner is welcome to provide other data that it finds relevant to the report.

Other demographics a petitioner may want to add, if the data is needed to justify the proposal.

- NJ Racial and Ethnic Breakdowns for the state, your county and the municipality.
- NJ Age Distributions for the state, your county and your municipality.
- NJ Workers by Industry for the state, your county and your municipality

Inventory of Key Characteristics

(Summarize what makes your place unique, opportunities & challenges)

In addition to planning documents and GIS data layers submitted as part of the prepetition meeting, please provide analysis on the following:

- current population and trends,
- housing and economic trends including affordable housing stock and projections of possible shortages,
- available public facilities and services,
- transportation/circulation/goods movement,
- water and sewer infrastructure, and capacity issues,
- natural, cultural and recreational resources;
- identified Environmental Justice and vulnerable populations issues
- vulnerabilities to climate change and/or sea level rise
- resiliency planning efforts

The petitioner may insert tables and charts as appropriate. Please go to the following web site to download data as needed:

http://factfinder.census.gov/servlet/DatasetMainPageServlet?_lang=en&_ts=http://factfinder.census.gov/servlet/DatasetMainPageServlet?_lang=en&_ts=

NJ MPO population projections, NJ municipal area in acres, and NJ labor data can be found on our website under Plan Endorsement Documents, Standard Analysis Data.

<https://www.nj.gov/state/planning/plan-endorsement.shtml>.

NJ Census data can be found on the US Census Bureau, Fact Finder web site:
<https://www.census.gov/data.html>

Also, to assist the State in preparing the Opportunities & Constraints Analysis, **to the extent that this data exists:**

- Data on square footage of commercial properties,
- number of households,
- acreage of vacant lands per municipal tax assessment,
- GIS Zoning layers and others that would assist in mapping of centers and other features.
- Potential growth area designations, e.g. redevelopment areas, TDR receiving areas, Transit Village

· DEP added the following but these items are requested as part of the prepetition materials. If they are included in the prepetition materials, do we need to include them here?

- Natural Resource Inventory
- Municipal water and waste water plans
- Municipal public access plans
- Open space plans
- Resilience plans
- Known state agency pending actions

Community Facilities

In addition to location, narrative information should be provided on current and future demand and capacity.

- Schools (private and public)
- Nursing homes
- Daycare centers
- Shelters/halfway houses/treatment centers
- Youth and recreation centers
- Government buildings and public services
- Medical clinics

Redevelopment and rehabilitation areas

In addition to location, information should be provided on the site's size, status (plans – including court-approved Fair Share settlements), agreements, environmental conditions, approvals, site preparation, construction) and, where relevant, date of designation.

- Brownfields
- Greyfields
- Hazardous sites

Status of Planning

This section should describe all recent relevant planning activities including but not limited to topics such as regional planning, master planning, redevelopment, economic development, affordable housing, transportation, utilities, open space & recreation, agriculture, historic preservation, shared services,

emergency planning. This section should also discuss the local public participation that has occurred in the above planning activities.

The petitioner is welcome to insert maps and text from existing planning documents so as not to duplicate efforts. The maps, GIS data and narrative created in this template shall be presented during the Community Visioning stage of Plan Endorsement to engage citizens in an informed dialogue about the future of their community.

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COMMUNITY VISION & PUBLIC PARTICIPATION

This section should discuss how any existing community vision supports the State Plan vision, with specific references to the State Plan goals and policies.

If the petitioner is requesting a waiver of the Community Visioning requirements of Plan Endorsement, this section should also discuss the local public participation that has occurred to develop the vision, including:

- dates of meetings, hearings and workshops;
- summary details of community input/comments (e.g. meeting minutes); and
- summary details of how petitioner considered and incorporated public input.

Note that to receive a waiver for an existing vision, the vision should look to the long-term future (e.g. a 20-year horizon) of the municipality with regard to major planning issues such as land use, housing, economic development, infrastructure and services, and natural and cultural resource protection. Additionally, the most recent visioning process must have occurred within the last 3 years and after any change in local planning strategies have been implemented.

RECENT AND UPCOMING DEVELOPMENT ACTIVITIES

This section should include a discussion of all major development activities that have occurred recently or are in the pipeline in the planning or approval process or under construction:

- pending major subdivision and site plan applications
- approved major subdivision and site plan projects for the past 5 years
- Board of Adjustment reports for the past 5 years (**Perhaps just use variances – not bulk per HFMA**)

The above information should be specific with regard to:

- location;
- scale (square footage, number of residential units);
- status (in review, approvals under construction);
- any measures for green design, for instance raingardens or other innovative green stormwater practices, living shorelines etc;
- any related public improvements; and,
- Sustainability/Resiliency measures to mitigate and adapt to climate change including elevating roads & structures; reduction of heat island effects; electric vehicle charging stations etc.

In the “Consistency with State Plan” sections, the report should describe how these development projects are consistent with State Plan goals and policies. If inconsistencies exist, those sections should discuss any opportunities to modify projects.

STATEMENT OF PLANNING COORDINATION

This section should describe how the petitioner has coordinated with state, regional and county agencies; adjacent municipalities; and/or the private and non-profit sectors in its planning efforts. The report needs to assess how local plans and regulations are consistent with the county master plan and any other regional plans, as well as state regulations. If inconsistencies exist, the report must explain why this is so, how the petitioner's plans are still consistent overall with the State Plan, and what actions are being taken to remedy them as applicable.

This statement should also include any inter-municipal initiatives for regional planning, shared services, tax sharing, emergency planning, etc. In addition, the petitioner should discuss to what extent land use and zoning are compatible in municipal border areas, including consideration of externalities and impacts on both sides of each border.

STATE, FEDERAL & NON-PROFIT PROGRAMS, GRANTS AND CAPITAL PROJECTS

This section should list and briefly describe all relevant projects or funding involving state resources. For each project, please provide the following information: Program name, Project name, Agency, a brief description, geographic area covered, project amount, project start date and project finish date.

SUSTAINABILITY/RESILIENCY STATEMENT

This section should describe how the municipality's planning and regulations support social, economic and environmental sustainability, including resiliency to climate change with specific examples from planning documents. Include how municipality will meet the following criteria:

- Complete vulnerability analysis based upon latest science and state policy/regulations
- Planning area and center boundaries reflect vulnerability and are based on state policy/regulations
- Complete Local Resilience Plan/Strategy that addresses local vulnerability and resilience issues (Additional detail TBD)

CONSISTENCY SECTION

Local & Regional Planning

This section should describe in detail the consistency between:

- data and information (inventories, growth projections, buildout analysis, needs assessment)
- community vision
- plan (master plan, redevelopment plans, etc.)
- regulation (zoning, land use regulations, other ordinances).

The report must provide information about how the vision and master plan are being implemented through regulations to address problems identified through the analysis of existing and projected future conditions. If inconsistencies exist, the petitioner should explain why they exist and what is being done to address them.

State Plan – Goals, Policies & Indicators

This section should contain the information for the 8 Goals & Strategies of the State Plan, aligned with relevant Policies and Indicators. Content in this section should be quoted directly from the State Plan. The petitioner should describe and address each of the Goals and Strategies and how their endorsement will be consistent with each one and how it supports the State’s efforts to achieve its targets for relevant indicators. It is not expected of the petitioner to calculate baselines and targets for indicators, but rather to describe the connection between local planning and the State Plan strategy to reach the target for each relevant indicator. The petitioner should select the Goals and Policies most relevant to the report and provide brief justification for excluding those that the petitioner considers irrelevant. Indicators should be realigned or deleted as necessary. The report should link its efforts for center(s) and environs with the appropriate goals, policies and indicators.

The petitioner may refer to previously completed OPA staff reports to view how this section should be structured. They can be attained at [insert web link here](#) . The Goals are:

- Goal 1: Revitalize the State’s Cities and Towns**
- Goal 2: Conserve the State’s Natural Resources and System**
- Goal 3: Promote Beneficial Economic Growth, Development and Renewal for All Residents of New Jersey**
- Goal 4: Protect the Environment, Prevent and Clean Up Pollution**
- Goal 5: Provide Adequate Public Facilities and Services at a Reasonable Cost**
- Goal 6: Provide Adequate Housing at a Reasonable Cost**
- Goal 7: Preserve and Enhance Areas with Historic, Cultural, Scenic, Open Space and Recreational Value**
- Goal 8: Ensure Sound, Integrated Planning and Implementation Statewide**

State Plan – Center Criteria & Policies

This section contains tables with the State Plan criteria for Regional Centers, Towns, Villages, Hamlets, and Cores. If it is the intent of the petitioner to request center designation and the petitioner already has a specific geographic area in mind, then the petitioner should use the relevant criteria table for each of its proposed centers. Moreover, if the petitioner seeks to maintain an existing center or re-designate an expired center, this section of the report must be completed. In these instances, the report shall also include the information required of a center monitoring report. The State Plan acknowledges that, depending on the context, some flexibility may be needed with regard to the application of quantitative criteria. The narrative must explain any inconsistencies with the criteria and why the proposed center(s) is consistent overall. Due to the built-out nature of New Jersey, a common example has been proposed centers that include existing development inconsistent with the criteria, but also containing opportunities for center-based development and linkages. In such a case, the below tables should contain an additional column that shows the net figures based on the new development and its land take. Keep in mind, that the new request for Center designation must address climate change, resiliency and flood vulnerabilities of the area.

The narrative must interpret and add relevant detail to the criteria data. The narrative should:

- discuss how centers will accommodate any anticipated future population and employment growth, while relieving development pressures in the environs;
- demonstrate how centers and planning area boundaries address climate change vulnerabilities;
- demonstrate how the jobs-housing ratio is being met by mixed uses rather than the mere inclusion of a certain ratio of otherwise separate commercial and residential zones;
- illustrate how centers are or will be pedestrian-friendly and transit-oriented. The mere presence of sidewalks or a lower speed limit alone does not denote that an area is pedestrian-friendly. The discussion should be comprehensive in nature, i.e. discussing how/why people (will) walk, bike and/or use transit in their everyday activities and errands;
- show how community facilities (ranging from municipal buildings to neighborhood recreation) are accessible within the center(s);
- provide general design concepts for Centers, ideally in a visual format or at least through a detailed description. This narrative should also describe major projects in the development pipeline and how they support the center concept; and
- demonstrate how the center fits appropriately in a broader regional context, particularly in complementing other centers in the region.

This section should also refer to relevant policies for Centers in the State Plan (pp.249-252). Proposed map changes must be submitted electronically as GIS shapefiles.

The petitioner should contact OPA's GIS staff if there are any questions.

Centers

The petitioner should review and become familiar with the criteria associated with the five types of centers that can be designated in the endorsement. The center types describe a range of characteristics that the center should have. They are:

- Urban Center, Regional Center, Town Center, Village Center, Hamlet Center

State Plan – Planning Area Policy Objectives

This section should describe how the petitioner’s planning is consistent with the State Plan’s Policy Objectives for each Planning Area. Per pages 187-229 of the State Plan, this section should follow an outline organized first by the various Policy Objectives:

- Land Use
- Housing
- Economic Development
- Transportation
- Natural Resource Conservation
- Agriculture
- Recreation
- Redevelopment
- Historic Preservation
- Public Facilities and Services
- Intergovernmental Coordination

Each Policy Objective shall discuss the range of existing and/or proposed Planning Areas, as shown below:

- Land Use
 - PA1
 - PA2
 - PA3
 - PA4/PA4B
 - PA5
 - PA5B

This section should also discuss how any Critical Environmental Sites, Parks & Natural Areas, and Military Installations are consistent with the Intent outlined in the State Plan.

MAPPING

All data described above should be submitted in GIS shape files when available. Proposed map changes need to be submitted electronically as GIS shapefiles. The petitioner should contact OPA’s GIS staff if there are any questions.

STATE AGENCY ASSISTANCE/EXPECTED BENEFITS

The report should identify specific planning initiatives and projects for which the petitioner is requesting state financial and/or technical assistance.

CONCLUSION

The report should have a conclusion summing up the petitioner's argument for the plan endorsement and any centers that might be included.

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