

Appendix VIII: The Public Facilities Master Plan (PFMP)

A Public Facilities Master Plan (PFMP) is a guidance document, or set of documents, that may be created to tie all of a locality's public facilities together in an effort to better manage them. What follows is a general discussion of PFMPs, with comments specific to Chesterfield County's experience added for reference at the end. It should be borne in mind that these comments are very general in nature.

Public Facilities Master Plan: Scope of Included Assets

The physical assets that may be included in a PFMP are potentially limitless. Each locality that chooses to employ a PFMP, however, must determine which assets to account for in the document. Depending upon the existing level of sophistication of the locality, some assets may be better managed independently of the PFMP. Assets included in a PFMP *might* include the following:

- **Buildings and Structures:** *The buildings and structures that the locality owns, builds, or maintains (examples: school buildings, library buildings, office buildings, fire stations, maintenance garages, water towers, water storage tanks, desalination plants, well facilities, warehouses, boat ramps, parks, recreational facilities, sports stadiums and fields, gymnasiums, correctional facilities, courthouses, physical plants and workshops, bridges, dams, etc.);*
- **Vehicles:** *The vehicles that the locality owns, purchases, or maintains (examples: fire trucks and fire department vehicles, police cars and motorcycles, boats, staff cars and vehicles, construction vehicles (bulldozers, road graders, backhoes, etc.), maintenance vehicles (service vans, service trucks, tractors), ambulances, aircraft, special rescue vehicles, etc.);*
- **Equipment:** *The equipment that the locality owns, purchases, or maintains (examples: lawn mowers, trimmers, chain saws, leaf blowers, maintenance equipment, ladders and scaffolding, construction equipment, chairs and desks, computers and network systems (and peripheral equipment and software), communications equipment, traffic control devices, machining and fabrication equipment, workshop equipment (table saws, routers, welding equipment, etc.), automotive repair equipment, personal equipment issued to personnel (fire-resistant jackets, boots, gloves, and trousers, air masks, air tanks, helmets, body armor, firearms, safety glasses, uniforms, radios, etc.);*
- **Timetables:** *Each item is typically listed with a useful life, purchase or construction date, and refurbishment or replacement date. Some items have a specific service life, like ambulances or fire trucks or staff cars, and must be replaced once the useful life is reached. Buildings and structures often have maintenance, renovation, and refurbishment schedules;*
- **Costs:** *The projected costs to purchase, construct, upgrade, or maintain each item may be included in the PFMP. The costs, when coupled with the timetables, allow for suitable fiscal budgeting.*

Public Facilities Master Plan: Scope of Included Elements

A PFMP may be as broadly or as narrowly defined as desired. For example, a PFMP could be created just for the fire department or the school system, or it could be all-encompassing. Even in the all-encompassing version there are still many choices to make about what goes into a particular PFMP and what does not. These choices are critical—a given PFMP will only be able to address those elements that are put into it.

- 1) **Relationship:** *One of the first things to establish with a newly proposed PFMP is the relationship that the PFMP will have to the locality's Capital Improvement Program (CIP), its Comprehensive Plan, and its adopted budget. By introducing a PFMP, the locality could potentially change the planning-funding relationship that exists between these three documents.*
- 2) **Introduction of New Items:** *While this might be closely related to the decisions that go into the relationship of the PFMP to the CIP, Comprehensive Plan, and budget, it still must be clear as to how new items and projects will gain entry into the PFMP.*
- 3) **Assumptions:** *Guidelines need to be established for the PFMP just as they might be for the locality's CIP process. For example, if the CIP only includes capital expenditure items costing \$50,000 or more, a similar threshold might be established for the PFMP. Also, cost may not be the only threshold. As an example, everyday office supplies such as paper and printer ink cartridges may add up to tens of thousands of dollars a year for a given locality's departments, but just as with the CIP, these items should probably not be included in the PFMP, even if they collectively surpass the \$50,000 threshold. Another example might be a large, one-time capital expenditure such as the locality undertaking the repair of series of stormwater control facilities. While such expenditure might logically be included in the CIP, it might not make sense to include it in the PFMP. The guidelines that govern what would be included in the PFMP would be laid-out in whatever assumptions are made during the process of designing the PFMP.*
- 4) **Needs, Service Guidelines, and Practices:** *Other items that might be included in a PFMP are such things as **needs**, **service guidelines**, and **practices**. Here, each department of the locality would assess its individual operations and establish what its current and future needs are. **Needs** might include items like office space, storage space and warehousing, upgrades in current facilities to accommodate new technologies, new buildings or facilities, and other large expenditure items that each department currently or potentially needs.*

***Service guidelines** outline the expected levels of service, output, or general function for the various departments and divisions of the locality that provide public facilities and/or services. An example might be that all emergency calls received by the locality's fire department shall be responded to within eight minutes, which would, in turn, guide the number and location of response vehicles, fire stations, and trained responders that the locality would provide. These service guidelines may be a part of the PFMP, and maintained and updated as needed within that document, if desired. The service guidelines may potentially represent a critical part of determining the needs of each public facility provider.*

***Practices** are special types of standards that may be applied to many or all of the public facilities of the locality at once. These would include items like planning all new buildings to meet defined*

minimum energy efficiency standards, minimum standards for open space, green space, and impervious cover, and may even include items like professionalism and customer service, hiring practices, bidding practices, and other standards that might typically be applied to all or most public facility providers.

- 5) **Administering the PFMP:** *Perhaps the most difficult part about having a PFMP (once the initial effort of establishing it has been completed) is recognizing that for a PFMP to be most useful it must be regularly updated to reflect changing conditions, or it will cease to be useful as a guidance document. The elected leaders, administration, and staff of the locality will need to act in unison to keep the PFMP – once adopted – running smoothly. Revenues are a finite thing; thus, whenever the PFMP is updated, it needs to be done in careful concert with the budget so that projects and needs are properly budgeted. In the event revenues fall off unexpectedly and reductions to the projects outlined in the PFMP are needed, the elected leaders, administration, and staff of the locality must work together to determine which projects can be delayed and what the consequences will be. For example, if a school building is scheduled to have a roof replacement, delaying the replacement could mean ending up with a bill that is substantially higher than what it might have been if the replacement had been completed as originally scheduled. This increased cost must also be taken into account.*

Public Facilities Master Plan: Advantages and Disadvantages

The potential *advantages* of creating and utilizing a Public Facilities Master Plan may be several. Generally, they can be summarized as introducing a more sophisticated way to manage the locality's limited financial resources, while at the same time meeting the needs of its citizens to the fullest extent possible. It is a tool which might serve to integrate the Capital Improvement Program (CIP), the Comprehensive Plan, and the locality's adopted budget in a transparent, straightforward way. The specific benefits of a PFMP may include the following, depending on the experience of the locality:

- 1) Better anticipation of the construction of new facilities for each agency/department/division/organization to meet the needs of the locality, while being cognizant of budgetary constraints and priorities. Annual CIP requests would be evaluated and prioritized against this PFMP;
- 2) Providing for the timely ongoing maintenance (or replacement, if appropriate) of the vehicles, buildings, and facilities of the locality;
- 3) Standardizing construction methods, building designs and layouts, (e.g., as with new schools and fire stations), and minimum requirements for new facilities (i.e., male and female quarters in fire stations, easily expandable designs to meet future growth, size of sites for elementary, middle, and high schools, etc.);
- 4) Programming energy efficiency, reduced environmental impact, and sustainability into building and facility designs; and
- 5) Identifying opportunities for the sharing of facilities, sites, or buildings between multiple agencies/departments/divisions/organizations and/or across multiple uses.

The potential *disadvantages* of utilizing a PFMP are seen at two critical times. First, there is a great deal of cost in both dollars and time expended associated with setting up and then maintaining a new PFMP. Chesterfield County, for example, which created its Public Facilities Master Plan in-house, estimates that it spent upwards of 5,000 staff hours and \$200,000 in preparing its plan which took several years to develop, from inception to completion. These estimates did not include the time spent preparing for or going through the public hearing process. The other time a PFMP can be problematic is when revenues generated are less than expected, and tough decisions need to be made about what gets shuffled, reduced, or eliminated.

For localities with detailed and well-managed public facility planning and guidance documents already in place, an additional disadvantage is potentially observed, in that the several departments and divisions already prepare carefully constructed budgets and lay out detailed projections, facility expansions or additions, and maintenance schedules. Thus, the PFMP could represent a costly and time-consuming duplication of effort. It is important to consider the track-record of the various public facility and service providers of the locality, with respect to preparing and implementing suitable and efficient plans for managing their facilities, services, expansions, and operations, as it may become evident a PFMP is not warranted.

The Chesterfield Public Facilities Plan (CPFP)

A number of years ago, Chesterfield County determined that a better system needed to be developed to monitor, administer, and plan for its public facilities. The feeling was that processes and programs could be better integrated, duplications in services and physical facilities might be better avoided, and overall planning could be more comprehensive if an overarching plan was created to tackle the County's management of its public facilities. Thus, the County began to develop the Chesterfield Public Facilities Plan (CPFP) in 2004.

As outlined in the final Chesterfield document,

The Plan comprehensively assesses existing and future public facility needs. The principal goal of the Plan is to forecast when and where expanded and new public facilities will be needed to most efficiently and conveniently serve county residents. The Plan is a valuable decision making tool that:

- Uses population growth projections to objectively identify the number and general location of public facilities needed through the year 2022.
- Assesses the need for public facilities countywide, in developed and newly developing areas.
- Provides guidance for the Capital Improvements Program (CIP) and cash proffers.
- Provides a link between all county facilities plans and the Comprehensive Plan.
- Identifies opportunities for land acquisition for facilities in advance of construction.

The Plan quantifies the demand for fire/rescue stations, libraries, parks, police stations, and schools through a detailed analysis of current and projected service demands. Level of

service goals and service area boundaries were defined in close consultation with county departments and Chesterfield County Public Schools (CCPS).

The Chesterfield Public Facilities Plan concluded with recommendations for construction of a number of new public facilities (to be completed by 2022) that included the following:

- Six new and five expanded fire/rescue stations
- Five new and one expanded elementary schools
- Three new middle schools and one expanded middle school
- Two new high schools (one of which is pending construction) and one expanded high school
- Two new regional parks
- Ten new community parks
- 29 new neighborhood parks
- Nine new special purpose parks
- Four new and four expanded library branches
- One new police district station and three new community policing offices

Chesterfield's experience is summarized as follows:

- Chesterfield's Planning staff created its PFMP in 2004; no consultants were used. The first revision to that PFMP is now underway and is expected to be adopted in 2009.
- The first revision to the PFMP got underway in July 2006. The Planning Department had one staff member working full-time for eighteen months to update the data. The revision has spent the balance of 2008 in public hearings and in waiting for the Chesterfield Comprehensive Plan, which is also being updated.
- During the plan revision, every Chesterfield County department submitted its own recommendations and statistics. Planning assembled the information.
- The plan revision required thousands of man-hours spread over all departments. Many Chesterfield departments have their own dedicated staff member to keep records.
- Chesterfield stated that it kept meticulous department statistics, which gave it a good footing for compiling the revised plan.
- The PFMP is updated every five years, with current, five-year, and ten-year outlooks.
- Having the PFMP allows Chesterfield to plan for capital projects on the horizon.

(A note regarding the Chesterfield PFMP: A research effort conducted by the Planners Advisory Service of the American Planning Association found no localities other than Chesterfield County that had put a PFMP in place. Several other localities were found to have detailed CIP programs which encompassed many of the elements found in the Chesterfield model, including the City of Davis, California, and the County of Gallatin, Montana. The Town of Yucca Valley, California, and the City of Dayton, Minnesota, appeared to have begun the process of creating and implementing a PFMP for the first time. In Dayton, a consultant was hired in 2008 to begin development of a PFMP in anticipation of high future population growth. Also in 2008, the Yucca Valley Public Works Department submitted the first phase of a PFMP draft to the town council for its consideration and work on the project is ongoing.)