



TOWN OF OCCOQUAN
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Occoquan Town Council
Work Session Meeting
Tuesday, February 16, 2016 | 7:00 p.m.

1. Call to Order

2. Regular Items

- a. Occoquan Comprehensive Plan: A Diagnostic Review – Report and Presentation
Presenter: Mike Chandler, Virginia Tech Land Use Education Program
- b. Treasurer’s Report – FY 2016 Year to Date Report (Second Quarter)
Staff: Town Treasurer
- c. Public Safety Discussion
Staff: Chief of Police/Town Manager
- d. FY 2017 Budget Work Session – Review and Priority Setting
Staff: Town Manager

3. Adjournment



TOWN OF OCCOQUAN

TOWN COUNCIL MEETING

Agenda Communication

2. Work Session Regular Agenda	Meeting Date: February 16, 2016
2 A: Occoquan Comprehensive Plan: A Diagnostic Review – Report and Presentation	

Explanation and Summary:

The Town's Planning Commission and staff have been working with Mike Chandler of the Virginia Tech Land Use Education Program since September of 2015, on a diagnostic review of the Town's 2003/13 Comprehensive Plan. The diagnostic was performed in order to aid the Planning Commission in the update of the comprehensive plan. Mr. Chandler will present the final report during the work session and discuss next steps and provide a plan template for use by the Planning Commission for the physical update of the comprehensive plan.

Attachments: (1) Assessing the Utility of the 2003/2013 Occoquan Comprehensive Plan: A Diagnostic Review (Prepared by Mike Chandler)

**Assessing the Utility of the 2003/2013
Occoquan Comprehensive Plan: A Diagnostic Review**

**Town of Occoquan
February 11, 2016**

**Michael Chandler
Chandler Planning**

Report Content

I. The Value of Planning

II. The Comprehensive Plan in Virginia

III. The Occoquan Comprehensive Plan Diagnostic

Step One: The Comp Plan Assessment Survey

Step Two: The Community Forums

Step Three: Critiquing the Occoquan Plan

IV. Key Diagnostic Recommendations

Needed Comprehensive Plan Adjustments

Proposed Timeline

Next Steps in the Plan Update Process

VI. Appendix

The Value of Planning

As noted in the preface of the 2003/13 Comprehensive Plan, Occoquan features a rich history, a delicate natural environment, and a diverse lifestyle. Indeed, the mix of community assets and liabilities, which distinguish the town today, is a byproduct of the choices and decisions made in the past.

In a similar way, Occoquan's future will be a function of the decisions the town will make today as well as in the tomorrows to come. Accordingly, it is imperative Occoquan expend the time and energy required to determine what kind of future the town wishes for itself. In short, Occoquan must plan for its tomorrow today.

Imagining a preferred future is the quintessential premise – and promise – of planning in the private sector as well as the public sector. Two of the best definitions for planning actually come from the world of business. The first defines planning as the thought that precedes action, while the second defines planning as the intelligent way to prepare for the inevitable.

If we substitute the word “future” for “inevitable,” the rationale for planning in the public sector becomes clear. Accordingly, it should come as no surprise that the Virginia General Assembly has mandated that every town, county and city across the state must prepare and adopt a comprehensive plan that will guide community growth and development.

The Comprehensive Plan in Virginia

Since 1980, each Virginia locality has been required to have a comprehensive plan which focuses on the physical development of the territory within the locality's jurisdiction.

More specifically, the purpose of the comprehensive plan (Virginia Code 15.2-2223) is to guide and accomplish a coordinated, adjusted and harmonious development of the territory which will, in accordance with present and probable future needs and resources, best promote the health, safety, morals, order, convenience, prosperity and general welfare of the inhabitants, including the elderly and persons with disabilities.

Continuing with the Code of Virginia, the comprehensive plan is general in nature, and with its accompanying maps, plats, charts and descriptive information, shows the locality's long-range recommendations for the general development of the territory encompassed by the plan.

It is important to note a comprehensive plan does not have the legal status of a zoning ordinance. It is advisory only and serves as a guide for the development and implementation of the zoning ordinance. However, the Virginia Supreme Court has ruled that a comprehensive plan may properly form the basis to approve or deny a rezoning or special use/special exception/conditional use permit. The Court has opined the following:

“While the minimum standards of the Comprehensive Plan may only be guidelines and not requirements to be applied inflexibly by the governing body, it is still a matter with the body’s discretion to decide whether to adhere to those standards or to follow some other reasonable approach in determining whether to grant or to deny a rezoning application.”

Although a comprehensive plan is general in nature, it is required to designate the general or approximate location, character, and extent of each feature, including any road improvement and any transportation improvement, shown on the plan. The Virginia Code requires (15.2-2223) a comprehensive plan to feature the following elements, chapters or plans:

Long-range recommendations for the general development of the locality: A comprehensive plan must show the locality’s long-range recommendations for the general development of the locality.

Transportation plan: A comprehensive plan must include a plan that designates a system of transportation infrastructure needs and recommendations that may include the designation of new and expanded transportation facilities including roadways, bicycle accommodations, pedestrian accommodations, bridges, waterways, airports, ports and public transportation facilities that support the planned development of the territory covered by the plan.

Road and transportation map: A comprehensive plan must contain a map showing road and transportation improvements, including cost estimates, of road and transportation improvements to the extent the information is available from VDOT. The plan must take into account the current and future needs of the residents of the locality while considering the current and future needs of the planning district within which the locality is situated.

Affordable housing: The comprehensive plan must designate areas in the locality for the implementation of measures to promote the construction and maintenance of affordable housing, sufficient to meet the current and future needs of residents of all income levels in the locality while considering current and future needs of the

planning district within which the locality is situated.

Road impact fee service areas: If a locality adopts an ordinance to impose road impact fees, impact fee service areas must be designated in the comprehensive plan (15.2-2320). Localities with a growth rate of 15% or more between the next to last and last decennial census are eligible to adopt such an ordinance (15.2-2318).

Traditional neighborhood design: If urban development areas (UDA) are designated in the comprehensive plan (15.2-2223.1), the comprehensive plan must incorporate principles of traditional neighborhood design in the UDA, which may include but is not limited to:

- pedestrian-friendly street design;
- the interconnection of new local streets with existing local streets;
- connectivity of street and pedestrian networks;
- the preservation of natural areas;
- mixed-use neighborhoods, including mixed housing types;
- the reduction of front and side yard building setbacks; and,
- the reduction of turning subdivision street widths and turning radii at street intersections.

In addition to incorporating the required plan elements outlined above, the Virginia Code (15.2-2223) permits a locality to include the following plan elements in their comprehensive plan:

Land use: A comprehensive plan may designate various areas for various types of public and private development and uses, such as different kinds of residential, business, industrial, agricultural, mineral resources, conservation, active and passive recreation, public service, flood plain and drainage and other areas.

Community service facilities: A comprehensive plan may designate a system of community service facilities such as parks, sports playing fields, forests, schools, playgrounds, public buildings and institutions, hospitals, community centers, waterworks, nursing homes, assisted living facilities, sewage disposal or waste water disposal areas, and the like.

Capital improvements programs, land use regulations, certain maps: A comprehensive plan may include a CIP, recommendations for subdivision and zoning regulations, and maps of mineral resource districts and agricultural forestall districts.

Historical areas and renewal: A comprehensive plan may designate historical areas and areas for urban renewal or other treatment.

Groundwater protection: A comprehensive plan may designate areas for implementation of reasonable groundwater protection measures.

Recycling centers: A comprehensive plan may include the location of existing or proposed recycling centers.

Utility line corridors: A comprehensive plan may include the designation of corridors or routes for electric transmission lines of 150 kilovolts or more.

Urban development areas: Any locality may designate one or more UDA's due to proximity to transportation facilities, available public or community water and sewer system, or a developed area to be used for redevelopment or infill development.

The Occoquan Comprehensive Plan Diagnostic

The Occoquan comprehensive plan diagnostic featured three distinct steps each designed to secure input and information concerning the utility of the 2003/13 Occoquan comprehensive plan. The results generated through each step will be presented separately.

Step One: The Comprehensive (Comp) Plan Assessment Survey

The Occoquan comp plan diagnostic began with a focused survey that was distributed to all members of the Occoquan Town Council as well as all members of the Occoquan Planning Commission, the Occoquan Board of Zoning Appeals (BZA) and the Occoquan Architectural Review Board (ARB). A cross-section of community business leaders and members of the Occoquan town staff were also asked to complete the survey which was designed to secure needed insight, opinion and perspective about the comp plan from the persons most familiar with the town's current comp plan.

The plan assessment survey was distributed to 63 persons in Occoquan. The distribution pattern and resulting participation rate was as follows:

Target Group	Surveys Sent	Surveys Completed
Town Council	6	3
Planning Commission	5	4
BZA	5	4
ARB	7	5
	23	16 (70%)
Town Staff	10	7 (70%)
Business Leaders	30	8 (25.8%)
Aggregate	63	31 (49.2%)

Plan Assessment Survey Results

The assessment survey focused respondent attention on six themes germane to land use issues presently facing Occoquan as well as land use issues likely to impact the town by the year 2020. The themes featured in the survey were as follows:

- a. Identify the positive impact the current Occoquan plan has generated over the past three years as well as the plans' top 3 strengths.
- b. Identify where the current Occoquan plan has fallen short as well as the plans' top 3 weaknesses.
- c. Identify the top 3 land use issues facing Occoquan in 2015.
- d. Identify the top 3 land use threats Occoquan will likely face in 2020.
- e. Identify the top 3 land use opportunities Occoquan will likely face in 2020.
- f. Assess the continued utility of the goals and policies featured in the 2003/13 comprehensive plan.

The results generated for each survey theme will be presented separately. In doing so, the reader is advised the data presented represents, unless otherwise noted, the aggregate input provided by all survey respondents. Responses linked to particular target groups for each survey theme can be found in the appendix.

A. Plan impact and top 3 plan strengths. When asked to identify the positive contributions the Occoquan plan has produced over the past several years, the leading response centered on the successful implementation of various goals and policies featured in the 2003/13 comp plan. Additional plan positives noted included the following:

- The introduction of angled parking and parking lots downtown.
- One-way traffic downtown.
- Limiting truck traffic in town.
- The new bridge.
- Efforts designed to capitalize on the river.
- Efforts designed to improve pedestrian mobility.
- Efforts designed to sustain Occoquan's character.
- Efforts designed to sustain the town's natural environment.
- Acquisition of the Tanyard Hill property.
- Removal of the water tank and initiation of the river walk project.

Relative to the plan's top 3 strengths, the leading responses in priority order were as follows:

- The narrative and strategy focused on sustaining and diversifying the downtown commercial and historic district, the streetscape downtown and the appearance of the buildings downtown (5).
- The plan contains information about the town's history and places a high priority on maintaining the town's distinctive character, feel and charm (5).
- The concept/idea to develop the water front and build the riverwalk (4).
- The current plan outlines a strategy for safeguarding Occoquan's natural environment (4).
- The plan is easy to read and understand (4).
- Many of the goals and policies featured in the 2003/13 plan remain relevant today (3).

- The plan's commitment to pedestrian movement as a component of the town's transportation strategy is a strength (3).
- The implementation schedule featured in the current plan is a strength that should be maintained (3).

B. Current plan shortcomings and top 3 weaknesses. When asked to identify examples where the comprehensive plan had fallen short in Occoquan, the responses received clustered around distinct topics including the following:

- Cut-through traffic continues to be a problem (8).
- Parking remains a problem downtown and in residential areas (6).
- Better land use controls are needed including a revised zoning ordinance (5); additional measures to assure historic properties are protected from development (5); measures designed to maintain the appearance and upkeep of properties in downtown (5); and, a strengthened storm water strategy(4).
- The mix of businesses and commercial enterprises in Occoquan needs to be diversified (4).
- The comp plan needs to be updated (4).
- The town plan needs an overarching vision (3).
- The plan needs to say more about sustaining the river (3).

Relative to the plan's top three weaknesses, many of the topics listed above made this list as well including:

- A new comprehensive plan is needed (8).
- A traffic management strategy is need that addresses the cut-through traffic issue as well as pedestrian mobility (7).
- The Occoquan zoning ordinance needs to be revised including a reduction in by-right residential density in the downtown (6).
- The Occoquan building code needs to be embellished such that property maintenance and property upkeep become a town norm (5).
- Occoquan needs to development a parking management strategy for the downtown as well as other areas of town (5).

- Occoquan needs a strategy designed to attract new businesses to town (4).
- Occoquan needs to update the town's storm water management strategy and related regulations concerning the river and related environmental matters (4).
- An overarching vision for Occoquan should be added to the revised town plan (3).
- The existing land use map in the current plan needs to be updated and a proposed future land use map (FLUM) needs to be added to the plan (3).
- The commitment to implement the revised plan must be advocated by the town council as well as the town planning commission (3).
- Monies needed to implement the goals and policies featured in the revised plan must be identified (3).

C. Top three 2015 Occoquan land use issues. As might be imagined the top 2015 land use issues identified through the plan assessment survey mimic the top plan weaknesses identified above. The top land use issues are as follows:

- A transportation/traffic management strategy that addresses cut-through traffic as well as pedestrian safety, and alternate modes of transportation is needed (14).
- The Occoquan zoning ordinance needs to be adjusted to limit/reduce by-right residential development in the downtown business district (10).
- A parking management study/strategy focused on the downtown commercial district and nearby residential areas is needed (9).
- The plan for the riverwalk needs to be finalized and a revenue stream identified to complete the project (8).
- A plan/strategy for enhanced property maintenance, property upkeep and storefront appearance is needed in the downtown commercial district (7).

- A plan to coordinate the management of common areas, open space and green space in Occoquan is needed (6).
- The mix of business establishments in downtown needs to be diversified and the downtown business/commercial district needs to be expanded (6).
- A comprehensive storm water, flood control and run-off management policy is needed (6).
- As Occoquan approaches build-out, a property redevelopment strategy needs to be crafted (3).
- A woodland buffer between Occoquan and Prince William County needs to be established and dialogue with the county needs to take place to discuss joint border area planning issues (2).

D. Top 3 Occoquan land use threats 2020. The perceived land use threats looking 5 years ahead generally mimic the 2015 land use issues with a few modifications. The top issues identified are as follows:

- Without a traffic mitigation plan and strategy in place, Occoquan's downtown business district may falter (7).
- Without a parking management strategy in place, Occoquan's downtown business district may fail to attract visitors and customers thereby constricting the flow of business revenue to the town and potentially harming the town's quality of life (5).
- Without a strategy in place that addresses the appearance of buildings downtown as well as storefront facades and property upkeep the business district may experience a decline (5).

Failing to reduce by-right residential zoning in the downtown business district may well result in the demise of business in the district (5).

- Failing to capitalize on the development potential associated with the river will lessen Occoquan's capacity to function as a full-service community (5).

- A diversity of new businesses will be needed if the Occoquan business district intends to prosper (4).
- The lack of a strategy for protecting Occoquan's prized properties, open space, green space and common areas may result in their being lost (4).
- Occoquan's land use regulations (zoning, subdivision and building codes) need to be strengthened to better manage future development in Occoquan (3).
- Failing to plan in concert with Fairfax County and Prince William County may result in Occoquan's gateways being compromised by poor development decisions beyond the town's corporate limits (3).

E. Top 3 Occoquan land use opportunities 2020. The perceived land use opportunities are, in many instances, a reversal of the identified land use threats. This, in a manner of speaking, speaks to the optimism and potential Occoquan can turn threats into opportunities. The top opportunities are as follows:

- The river walk is completed with public access provided (8).
- Strategies for maintaining the Occoquan's natural environment inclusive of the river, green space, and open space are in place and are followed (7).
- Zoning ordinance amendments are made that limit the amount of residential development in the downtown business district and address infill development, the adaptive reuse of property as well as the redevelopment of stagnant properties in town (5).
- Property maintenance codes are strengthened to address building appearance, property upkeep and storefront façade issues in Occoquan (5).
- By using the river as a magnet, a diversified mix of business and commercial enterprises are located in the downtown business district (4).
- A plan for the Jennings property is in place (3).

- Alternate forms of mobility including bus, bike and boat are common in Occoquan (3).
- A solid storm water management plan and flood control plan are in place (3).
- Efforts to return the building permit function and the building official functions from the county to Occoquan are successful (2).
- Enhanced communication and cooperation with Prince William County focused on joint border area eastward along the river is a reality (2).

F. Utility of the 2003/13 comprehensive plan goals and policies. The comments and recommendations received from the survey target groups regarding the relevance and utility of the 2003/13 comp plan goals and policies were as follows:

- Many of the goals featured in the current comp plan remain relevant as do many of the accompanying policies (7).
- Several of the policies featured in the current plan, however, need to be modified and/or updated (6).
- Occoquan needs to draft and adopt a mixed use ordinance (3).
- Occoquan needs to identify incentives that will result in the river walk being completed (3).
- Occoquan needs to revise its zoning ordinance to permit wineries, craft breweries and distilleries; permit office uses in the historic/commercial district; and, lessen the potential of commercial uses converting to residential uses in the historic/commercial district (3).
- Zoning by-right needs to be changed to allow for staff review and input as well as planning commission review and town council review and action (3).
- Efforts designed to protect special or prized properties from development are needed (2).

- Post office boxes may be needed at the neighborhood level (2).

Plan Assessment Summary Findings. The assessment survey provides important insight and perspective regarding the continued utility of the Occoquan comprehensive plan. Chief among the findings is the value and salutary difference the comp plan has made in Occoquan over the past decade. Of equal importance, the assessment exercise clearly indicated many of the goals and policies featured in the current comp plan continue to resonate as relevant planning and community standards for today as well as the future.

The assessment survey, as might be expected, also uncovered plan weaknesses and shortcomings. The tables appearing on the next two pages reflect Occoquan's leading planning concerns as well as aggregate planning issues. The table on page 15 provides significant perspective beginning with the leading examples of where the current comp plan has fallen short linked with the current plan weaknesses as identified through the assessment survey. As the reader will note, two additional variables (top three 2015 issues and the top three 2020 trends) are also featured on the table. Collectively, the information on Table 1 yields a composite of the top planning concerns in Occoquan.

**TABLE 1
Occoquan Planning Concerns**

Where the Plan Fell Short		Top 3 Weaknesses	Top 3 Issues 2015	Top Trends 2020	Total
Cut through Traffic	8	7	14	7	36
Parking Problem	6	5	9	5	25
Zoning Revisions for Downtown	5	6	10	5	26
Protect Prized Property from Development	5	-	6	4	15
Property Upkeep Measures Needed	5	5	7	5	22
Stronger Storm Water and environmental measures needed	4	4	6	4	18
Diversify Business Mix in downtown	4	5	6	4	19
Plan Needs Updating With redevelopment component	4	8	3	-	15
Vision Needed in the plan	3	3	2	6	14
Sustain/Develop the River	3	4	8	5	20

Table 2, as the reader will discern, lists the leading planning issues facing Occoquan. The weighted scoring was a function of the plan assessment survey. The aggregate issues listed on Table 2 will serve as a sounding board for the subject matter to be featured in the revised Occoquan comprehensive plan. The information featured in both tables was also shared with the public during the community forum phase of the Occoquan comp plan diagnostic review which will be discussed next.

TABLE 2
Aggregate Planning Issues

1. Traffic, traffic management	36
2. Zoning revisions needed downtown to reduce residential densities	26
3. Parking management	25
4. Property maintenance, upkeep and appearance	22
5. Capitalize on the river while sustaining the river	20
6. Diversify the mix of businesses downtown	19
7. Strengthen storm water and related regulations	18
8. Comp plan update needed/ Redevelopment needed	15
9. Strategies to protect prized property	15
10. Vision needed in the plan/town	14

In sum, the assessment survey, along with the two tables above, provide ample evidence for why the current Occoquan comp plan is no longer relevant as an instrument of public policy. The assessment survey findings clearly detail the shortcomings and deficiencies associated with the current comp plan. Conversely, the summary findings make clear Occoquan's next comp plan must address traffic, mobility and circulation issues as well as the mix of businesses and the character and type of development downtown. The new plan must also sustain the natural environment while securing a positive town connection with the river.

Step Two: The Community Forums

The next step in the comp plan diagnostic review, once the assessment surveys were tallied, was the sponsorship of a forum in November, 2015 wherein the survey results were shared with the members of the respective focus groups who completed the assessment exercise. Accordingly, over two consecutive evenings, meetings were held with members of the Occoquan planning commission, the town council, the BZA, the architectural review board as well as key business leaders and key members of the town staff.

In addition to reviewing and discussing the survey results, the forum participants were asked to share their thoughts and ideas about the type of land use changes Occoquan might well experience 5 to 10 years in the future. In doing so, the forum participants were asked to identify specific land use adjustments or changes (through a mapping exercise) Occoquan might need to make if the town is to successfully accommodate anticipated future growth and development by the year 2020 and beyond.

It is important to note a third forum was sponsored in November. This forum was open to the public. The process that was used with the members of the focus groups was also used with the citizens who chose to attend the forum including the mapping exercise.

In early December of last year, a fourth community forum was held in Occoquan. During this forum, the final assessment survey results were presented and discussed. In addition, the contractor retained to conduct the comp plan diagnostic exercise shared preliminary findings relative to the land use issues facing the town and the likely comp plan adjustments Occoquan will face moving forward. Lastly, a consensus future land use map reflective of the input received during the November forum was shared with forum participants. It is important to note those in attendance at the December forum embraced the consensus future land use map as being a reasonable and rational representation of how Occoquan could accommodate future

growth and development in the town over the next ten years. A copy of the consensus Occoquan future land use map can be found in the appendix of this report.

Step Three: Critiquing the Occoquan Comp Plan

The third step in the diagnostic exercise featured a critique of the Occoquan comp plan by the contractor retained to perform the diagnostic review. In meeting this requirement, the Occoquan plan was reviewed with specific attention given to the plan's content, clarity and completeness. In addition, an assessment was made relative to the plan's conformance with the comprehensive plan requirements listed in the Code of Virginia. The key findings generated through this third step of the diagnostic process, which will be presented as strengths and weaknesses, are as follows:

Current Plan Strengths

- The current Occoquan comp plan is easy to read and understand. The narrative discussing Occoquan's history is especially informative as is the narrative focused on sustaining the town's natural environment.
- The current comprehensive plan strategy focused on sustaining and diversifying the downtown commercial and historic district as well as the town's overall small-town feel and charm is laudable.
- The concepts and strategies found in the current plan to safeguard Occoquan's natural environment are equally laudable.
- The implementation schedule featured in the plan is a positive.
- The desire to develop the waterfront and build the river walk continues to resonate as a community goal.
- Many of the goals and policies featured in the current comp plan remain relevant today and should be included in the updated plan.
- The current comp plan brought about positive change in Occoquan because the plan was valued, followed and implemented.

Current Plan Weaknesses

- The current comp plan does not feature an enumerated table of contents nor is the plan organized in a manner that conveys the relative importance of each plan component.
- The current comp plan does not feature an overarching vision for Occoquan.
- The current comp plan features 11 goals aligned with 6 functional plan elements. Many of the goals remain relevant today and they should be considered for inclusion in next Occoquan plan. It is probable; however, several of the goals will be modified and/or consolidated once the plan is updated. It is also likely new goals will be added to the plan.
- The current Occoquan plan features 50 enabling strategies linked to the 11 comprehensive plan goals. Several of the strategies have been addressed and/or implemented. And, as with the 11 comp plan goals, many of the strategies remain relevant today and they should be considered for inclusion in the next town plan. It is likely the absolute number of strategies will be reduced through consolidation and reorganization.
- The current comp plan is deficient with respect to content mandated by the Code of Virginia (affordable housing and transportation enhancements). This shortcoming can be address during the comp plan update process.
- Various themes/topics featured in the current comp plan such as the population narrative and the economy and finances narrative are out of date and need to be revised.
- A similar assessment applies to the narrative in the current plan focused on transportation, housing, community facilities and generalized land use. Numerous changes have taken place over the past 13 years thereby necessitating an update of these plan elements.
- The future land use map (FLUM) featured in the current comp plan (p.37) needs to be redrawn and relabeled. An up to date existing land use map (ELUM) needs to be drafted and included in the revised plan.

- The future land use section featured in the current comp plan needs to be revised, restructured and relocated. The respective “action plans” for future land use, transportation and circulation, and natural resources need to be modified to reflect current conditions as well as the opportunities and threats presently and likely to face Occoquan.
- The action time-lines and implementation strategies featured in the current plan need to be revised and updated.
- As written, the current comp plan does not provide town appointed and elected leaders with a solid frame of reference with regard to making land use decisions. The comp plan is out of step with the character of land development taking place in Occoquan. In like fashion, the town’s primary regulatory instrument (zoning) is ill-equipped to guide the type of development currently taking place in Occoquan. Updating the town’s comp plan will provide the necessary foundation for revising Occoquan’s zoning ordinance and related development codes.

Key Diagnostic Recommendations

If Occoquan intends to plan for its tomorrow today with a premium placed on efficiency, effectiveness and accountability, the town’s current comprehensive plan needs to be revised and updated. It is hoped the town planning commission and the town council will give serious consideration to the following recommended actions:

- The Occoquan planning commission, as mandated by the Code of Virginia, will take charge of the comp plan update process. The update process should begin no later than March 1, 2016. The planning commission should develop a plan update schedule replete with milestones. The planning commission should allocate 120 days for the plan update process. The contractor retained to conduct the diagnostic study will, if requested, assist the planning commission with the comp plan update at no charge to the town.
- The Occoquan planning commission, in partnership with the town council, should give strong consideration to appointing a citizens steering committee to assist with the comp plan update process.
- The Occoquan planning commission should give strong consideration to creating a new format and structure for the new comp plan. Points to consider include front loading the plan with a newly crafted vision statement followed by a listing of the plan goals and policies and a summary of the

plan's major themes. This format will allow the reader to quickly surmise Occoquan's desired land use pattern. In addition, the planning commission should establish a comp plan time horizon of 2016-2025.

- Strong consideration should also be given to including in the revised comp plan specific themes capable of addressing the challenges and opportunities Occoquan will likely face during the 2016-2025 time frame.
- Possible comp plan themes, based on the results of the diagnostic exercise, could include the following:

A Vibrant Town Center
Community Character
Circulation and Mobility
Environmental Stewardship
Economic Diversity
Regional Coordination

- In addition to the plan themes, traditional plan elements or chapters focused on community facilities, historic preservation, and housing would also be featured.
- A separate chapter focused on plan implementation and plan accountability should be included in the revised Occoquan plan.
- The Occoquan planning commission, as part of the plan update process, will be encouraged to sponsor at least one multi-phase public forum for the purpose of securing citizen input regarding future land uses and future land use patterns in Occoquan. This forum would likely take place approximately 75 days after the comp plan update process is initiated.
- A template for the revised comp plan will be shared with the members of the Occoquan planning commission and the members of the town council in advance of the scheduled February 16 joint work session. The template will include a suggested comp plan structure along with a draft vision statement, suggested plan themes and plan chapters. Selected draft plan goals/policies will also be shared.
- The template will provide the planning commission with a platform to be used in crafting a new plan for Occoquan. In doing so, the planning

commission will be the party responsible for drafting the actual plan content. As previously noted, the contractor, if asked, will assist the planning commission with this task at no charge to the town. Also, as stipulated in the diagnostic contract, the contractor will update the socio-economic information to be featured in the updated comp plan. This revised data will be shared with the planning commission in March once the comp plan update schedule is finalized.



TOWN OF OCCOQUAN
TOWN COUNCIL MEETING
Agenda Communication

2. Work Session Regular Agenda	Meeting Date: February 16, 2016
2 B: Treasurer's Report - FY 2016 Year to Date Report (Second Quarter)	

Explanation and Summary:

The Town Treasurer will provide the financial report for the second quarter (October - December) of Fiscal Year (FY) 2016.

Attachments: (1) Treasurer's Financial Report

TOWN OF OCCOQUAN
FINANCIAL REPORT
AS OF 12/31/2015

- * General Fund actual Net Income is \$6,700 below budget
- * General Fund actual Net Income is \$12,000 below General Fund Net Income for 12/31/14
 - * We've received \$4,300 in Brick Revenue as of 12/31/15
- * \$361,400 of the Services Expense/Revenue Engineering is attributed to River Mill Park

TOWN OF OCCOQUAN
Balance Sheet Prev Year Comparison
 As of December 31, 2015

	31-Dec-15	31-Dec-14	\$ Change
ASSETS			
Current Assets			
Checking/Savings			
10001 · Petty Cash	100	100	-
10020 · Operating Account - Payroll	15,487	16,332	(844)
10021 · Operating Account	161,074	59,212	101,862
10030 · Craft Show - Checking	11,330	9,939	1,391
10031 · Craft Show - MM/CD	200,000	200,000	-
10032 · Craft Show - MM	178,838	177,895	944
10033 · Craft Show - PayPal	453	-	453
10034 · Craft Show - Investment Pool	100,015	-	100,015
10080 · Mamie Davis - Checking	4,373	4,775	(402)
10081 · Mamie Davis - MM/CD	100,000	100,000	-
10090 · Bricks Account	3,963	-	3,963
Total Checking/Savings	775,633	568,252	207,381
Accounts Receivable			
10180 · Accounts Receivable	72,124	65,803	6,320
10190 · Real Estate Receivable	3,568	1,607	1,961
10200 · Sales Tax Receivable	4,052	4,284	(231)
10250 · Engineering Receivable	6,195	12,171	(5,976)
Total Accounts Receivable	85,939	83,865	2,075
Other Current Assets			
10230 · Inventory	1,985	302	1,683
11000 · Prepaid Expenses	10,129	8,928	1,201
Total Other Current Assets	12,114	9,230	2,884
Total Current Assets	873,686	661,347	212,340
TOTAL ASSETS	873,686	661,347	212,340

TOWN OF OCCOQUAN
Balance Sheet Prev Year Comparison
 As of December 31, 2015

	31-Dec-15	31-Dec-14	\$ Change
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Accounts Payable			
20000 · Accounts Payable	171,929	30,875	141,055
Total Accounts Payable	171,929	30,875	141,055
Other Current Liabilities			
20930 · Security Deposit	1,300	300	1,000
20935 · Performance Bond	4,126	-	4,126
20940 · Unearned Craft Show Revenue	8,688	3,700	4,988
20950 · Unearned Other Revenue	550	187	363
20980 · Unearned R.E. Tax	46,191	43,945	2,246
21100 · Grant Pass-thru	200	200	-
21200 · Payroll Liabilities	8,617	8,093	524
Total Other Current Liabilities	69,672	56,426	13,246
Total Current Liabilities	241,601	87,300	154,301
Total Liabilities	241,601	87,300	154,301
Equity			
30000 · Restricted-Mamie Davis Fund	100,000	100,000	-
30010 · Operating Reserve	200,000	-	200,000
30020 · Unrestricted Retained Earnings	(24,699)	510,977	(535,676)
30030 · Temporarily Restricted - CS	221,407	331,721	(110,314)
30040 · Temporarily Restricted - CIP	226,500	7,610	218,890
30050 · Temporarily Restricted - MDP	4,072	-	4,072
30060 · Temporarily Restricted - PS Grant	14,206	-	14,206
Net Income	(109,402)	(376,262)	266,860
Total Equity	632,085	574,046	58,039
TOTAL LIABILITIES & EQUITY	873,686	661,347	212,340

TOWN OF OCCOQUAN
General Fund Profit & Loss Budget vs. Actual
 July through December 2015

Ordinary Income/Expense	Jul - Dec '15	Budget	\$ Over Budget	% Over Budget
Income				
40000 - TAXES				
* 40020 - Meals Tax	86,046	85,617	429	1%
* 40030 - Sales Tax	12,281	13,100	(819)	-6%
40040 - Utility Tax	15,185	15,500	(315)	-2%
40050 - Communications Tax	22,413	23,300	(887)	-4%
Total 40000 - TAXES	135,925	137,517	(1,591)	-1%
41000 - FEES/LICENSES				
41010 - Auto Decals	10,704	11,200	(497)	-4%
41020 - Business Licenses	5,288	-	5,288	100%
41030 - Late Fees	2,758	1,000	1,758	176%
41040 - Fines - Public Safety	4,666	6,000	(1,334)	-22%
41050 - Architectural Review Board Fees	110	250	(140)	-56%
41060 - Precious Metal License	200	300	(100)	-33%
41070 - ATM Fees	1,500	1,500	-	0%
41080 - Dock Fees	314	175	139	79%
41090 - Engineering Fees	-	1,000	(1,000)	-100%
41100 - Administrative Fees	1,013	1,000	13	1%
* 41110 - Services Revenue- Bldg Official	9,945	-	9,945	100%
41120 - Services Revenue - Engineering	366,338	-	366,338	100%
41130 - Services Revenue - Legal	1,360	-	1,360	100%
41140 - Services Revenue - Other	2,302	-	2,302	100%
Total 41000 - FEES/LICENSES	406,498	22,425	384,073	1713%
42000 - GRANTS				
42010 - Litter Grant	1,071	1,000	71	7%
42020 - Public Safety (HB 599)	10,648	10,649	(1)	0%
42030 - Safety	-	500	(500)	-100%
Total 42000 - GRANTS	11,719	12,148	(429)	-4%
43000 - RENTALS				
43010 - Town Hall	300	250	50	20%
43030 - Mamie Davis Park Rental	900	875	25	3%
Total 43000 - RENTALS	1,200	1,125	75	7%
44000 - OTHER				
44010 - General Fund Interest	31	50	(19)	-39%
44040 - Bricks Revenue	4,323	-	4,323	100%
44050 - Other	7,417	-	7,417	100%
Total 44000 - OTHER	11,771	50	11,721	23451%
Total Income	567,113	173,265	393,847	227%

* Estimate

TOWN OF OCCOQUAN
General Fund Profit & Loss Budget vs. Actual
July through December 2015

Expense	Jul - Dec '15	Budget	\$ Over Budget	% Over Budget
Total 60000 · PERSONNEL SERVICES	139,243	136,753	2,490	2%
60400 · PROFESSIONAL SERVICES				
60410 · Building Official Services				
* 60415 · Services Expense - Bldg Official	9,945	-	9,945	100%
60410 · Building Official Services - Other	16,608	2,500	14,108	564%
Total 60410 · Building Official Services	26,553	2,500	24,053	962%
60420 · Consulting	185	750	(565)	-75%
60430 · Zoning and Engineering Services				
60435 · Services Expenses - Zoning/Engineering	366,338	-	366,338	100%
60430 · Zoning and Engineering Services - Other	25,663	12,500	13,163	105%
Total 60430 · Zoning and Engineering Services	392,001	12,500	379,501	3036%
60440 · Legal Services				
60445 · Services Expense - Legal	1,360	-	1,360	100%
60440 · Legal Services - Other	31,950	17,500	14,450	83%
Total 60440 · Legal Services	33,309	17,500	15,809	90%
60460 · Payroll Processing	416	300	116	39%
60470 · Bank Charges	79	-	79	100%
Total 60400 · PROFESSIONAL SERVICES	452,543	33,550	418,993	1249%
Total 60800 · INFORMATION TECHNOLOGY SERVICES	6,393	7,075	(682)	-10%
Total 61200 · MATERIALS AND SUPPLIES	5,222	4,185	1,037	25%
Total 61600 · OPERATIONAL SERVICES	3,274	5,400	(2,126)	-39%
Total 62000 · CONTRACTS	38,334	40,750	(2,416)	-6%
Total 62400 · INSURANCE	8,258	8,135	123	2%
Total 62800 · PUBLIC INFORMATION	1,869	2,050	(181)	-9%
Total 63200 · ADVERTISING	665	10,000	(9,335)	-93%
Total 63600 · TRAINING AND TRAVEL	3,922	5,625	(1,703)	-30%
Total 64000 · VEHICLES AND EQUIPMENT	6,235	9,800	(3,565)	-36%
Total 64400 · SEASONAL	3,348	4,750	(1,402)	-30%
Total 64800 · TOWN HALL	4,947	4,385	562	13%
Total 65200 · MILL HOUSE MUSEUM	6,266	6,310	(44)	-1%
Total 65600 · VISITORS CENTER	-	310	(310)	-100%
Total 66000 · MAINTENANCE YARD (Commerce)	581	860	(279)	-32%
Total 66400 · MILL STREET STORAGE FACILITY	-	185	(185)	-100%
Total 66800 · RIVER MILL PARK & FACILITY	849	-	-	0%
Total 67200 · MAMIE DAVIS PARK	1,316	2,025	(709)	-35%
Total 68400 · STREETS AND SIDEWALKS	585	1,125	(540)	-48%
Total 68800 · HISTORIC DISTRICT	6,373	6,400	(27)	0%
Total Expense	690,222	289,671	400,551	138%
Net Income	(123,109)	(116,406)	(6,703)	6%

* Estimate

Craft show Fund

	Jul - Dec '15	Budget	\$ Over Budget	% Over Budget
Income	104,377	111,513	(7,136)	-6%
Expense	53,902	52,091	1,811	3%
	50,475	59,422	(8,947)	-15%

Mamie Davis Park Fund

	Jul - Dec '15	Budget	\$ Over Budget	% of Budget
Income	301	300	1	0%

CIP Fund

	Actual Jul - Dec '15	Annual Budget	Remaining Budget
70001 - Mill St. Revitalization Project	17,331	150,000	132,669
70005 - Building Maintenance	13,485	15,000	1,515
70006 - Stormwater Management	-	5,000	5,000
70010 - Annex Property Improvements	-	-	-
72001 - Tanyard Hill Parcel - Site Research	-	5,000	5,000
72004 - Canoe/Kayak Ramp	25	36,000	35,975
76005 - A/V Equipment - Town Hall	-	5,000	5,000
78001 - Document Management System	5,000	20,000	15,000
78002 - Town Code Recodification/Legal Review	-	12,000	12,000
78003 - Conference Room - Town Hall	1,227	2,000	773
78004 - Comprehensive Plan Review/Update	-	5,000	5,000
Total 70000 - CIP EXPENSE	37,068	255,000	217,932

70001 - Mill St. Revitalization Project is comprised of a permit, concrete replacement due to tree removal, banners and curb painting



TOWN OF OCCOQUAN
TOWN COUNCIL MEETING
Agenda Communication

2. Work Session Regular Agenda	Meeting Date: February 16, 2016
2 C: Public Safety Discussion	

Explanation and Summary:

This is a continuation of the discussions regarding Town public safety goals.

Summary of Previous Council meetings and work session activities related to Public Safety:

March 3, 2015 Regular Meeting: Town Council discussed public safety as it related to identifying public safety goals for the Town of Occoquan. The Council established the following goals for public safety:

- Protection of private property;
- Improvement of pedestrian safety;
- Increased patrol hours including nights and weekends;
- Prioritizing community meetings outside of town; and
- Updating department policies.

Also during this meeting, Council requested staff to provide options for increasing the size of the police department within the Proposed FY 2016 Budget process.

FY 2016 Budget Process: The FY16 Budget included funding to hire and train two additional auxiliary police officers. Two officers were hired effective February 2016 and are in the process of being trained and scheduled. These officers will work approximately 20 hours per month each, and focus on assisting with coverage for special community events, nights, weekends and holidays. Their main focus will be on traffic enforcement and pedestrian safety.

September 15, 2015 Work Session: Due to continued conversations about public safety, staff requested guidance on public safety goals. Staff provided historical information on the department's structure and previous staffing levels. Council discussed the benefit of the increased presence of Prince William County Police Department within the town. The Council requested additional data regarding time break out and officer to resident ratios in other jurisdictions.

October 20, 2015 Work Session: Held a follow up work session regarding public safety priorities. Staff provided Council with information requested at the previous work session including Chief's average time breakout and a locality comparison of officer to resident ratios. Due to continuing conversations about public safety, staff requested guidance on public safety goals. Council discussed hiring an administrative person to assist with taking administrative responsibilities off of the Chief to free up time to allow more patrol hours and the benefit of hiring off-duty officers during important events and on nights and weekends. In summary, the Council agreed by consensus to hiring off-duty police officers to assist in night and weekend patrolling, and agreed that more time should be spent on traffic control and enforcement, and protection of public property.

Next Steps:

Since the previous work sessions, conversations have continued regarding public safety within the Town of Occoquan. Staff has taken steps to achieve the goals outlined at the March 3, 2015 work session including:

1. Hiring auxiliary police officers to cover more in-town activities and hours and to focus on traffic enforcement and pedestrian safety;
2. Hiring off-duty police officers as needed to cover special activities or Chief vacation utilizing public safety grant funding;
3. Adjusted Chief's schedule to alternate between day shifts and evening shifts, as well as some night and holiday shifts to provide police presence in town and perform traffic enforcement and pedestrian safety activities;
4. Continued to foster a positive relationship with Prince William County Police Department, which has resulted in increased County presence within the Town;
5. Limited attendance at out-of-town meetings in order to increase time spent within the Town; and
6. Drafted revised General Orders, resulting in a more comprehensive document that meets current DCJS standards – currently under review.

Chief John Clair of the Quantico Police Department will attend the February 16, 2016 work session as a resource for the town in discussing public safety goals, and to provide background on operating a police department within a small community with limited resources. The Town of Occoquan is one of 13 communities in Virginia that has a one-person police department.

Attachments: None.



TOWN OF OCCOQUAN
TOWN COUNCIL MEETING
 Agenda Communication

2. Work Session Regular Agenda	Meeting Date: February 16, 2016
2 D: FY 2017 Budget Work Session	

Explanation and Summary:

This is the first of three work sessions to discuss the proposed Fiscal Year 2017 Budget and Capital Improvement Plan. This work session will focus on review of current year accomplishments and activities, unmet needs, expected service and programming requirements, future year goals, and priority setting. Budget documents will be provided during the work session.

BUDGET SCHEDULE

Town Council Budget Work Session	Tuesday, February 16, 2016	7:00 p.m.
Proposed FY17 Budget Submitted to Council, Available to Public	Friday, February 26, 2016	COB
Town Council Budget Work Session	Tuesday, March 1, 2016	After Regular Meeting
Town Council Budget Work Session	Tuesday, March 15, 2016	7:00 p.m.
Public Hearing: Proposed FY17 Budget	Tuesday, April 5, 2016	7:00 p.m.
Public Hearing: Proposed FY17 Tax Rates	Tuesday, April 26, 2016	7:00 p.m.
Adoption of FY17 Tax Rates and Budget	Wednesday, May 4, 2016	7:00 p.m.

Attachments: None