

March 19, 2026

# HOUSING ONONDAGA IMPLEMENTATION STRATEGY UPDATE



# Agenda

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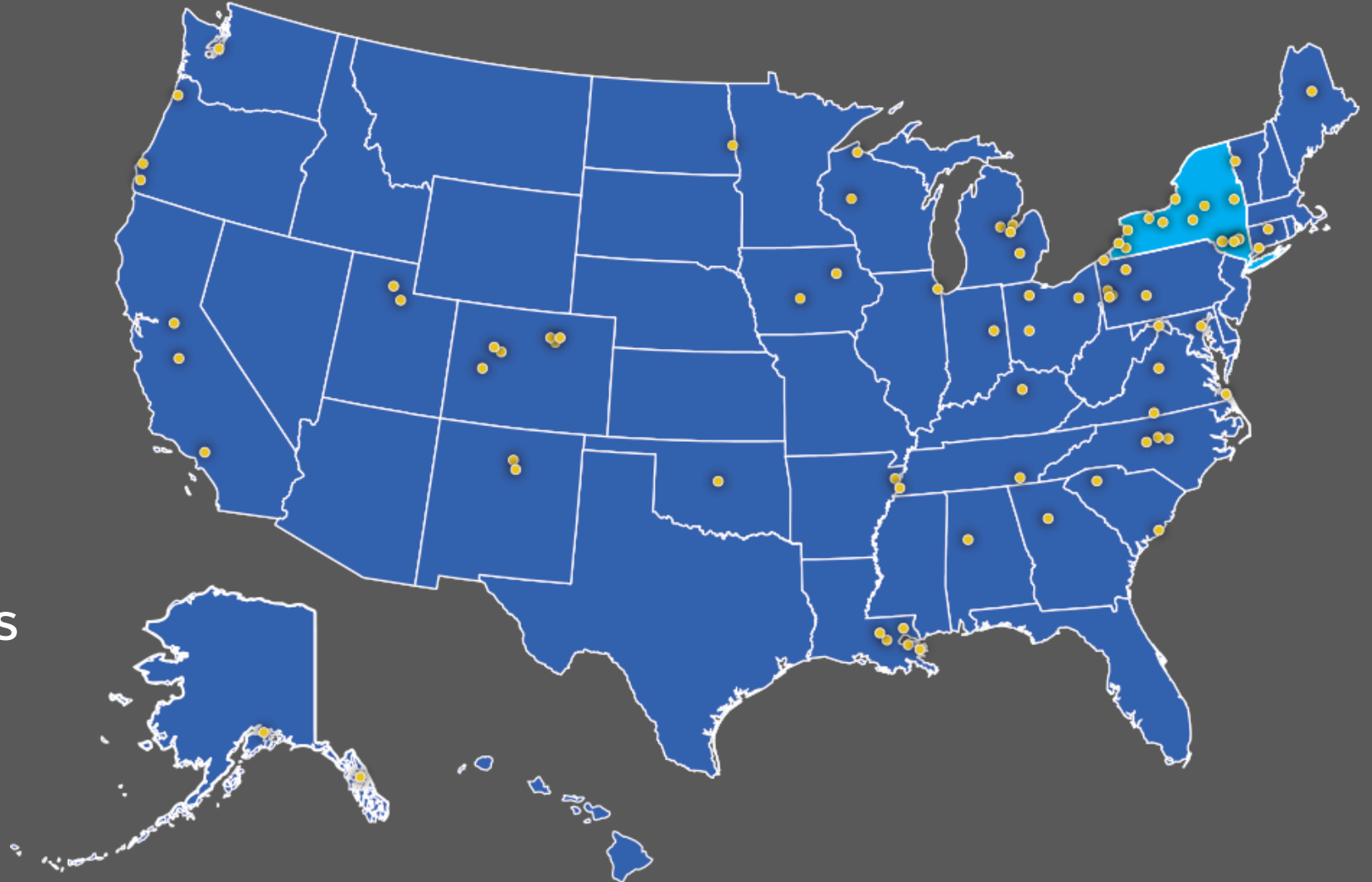
- About czb
- Housing Onondaga Background
- Implementation Strategy
- Q&A

## Locations

- Maine
- Rochester
- Colorado

## Specialties

- Housing
- Planning
- Development Codes



# About Us: czb's Work in New York State

Batavia

Buffalo

Dunkirk

Dutchess County

Geneva

Hamilton

Jamestown

Monroe County

Onondaga County

Oswego

Perry

Poughkeepsie

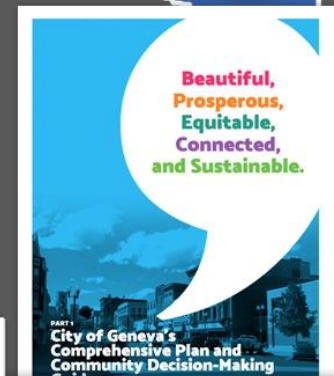
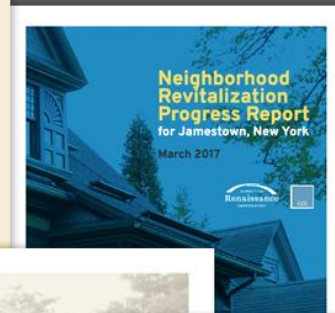
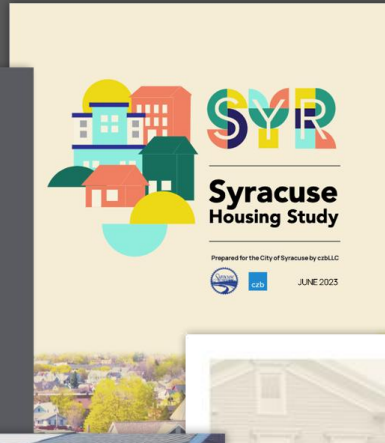
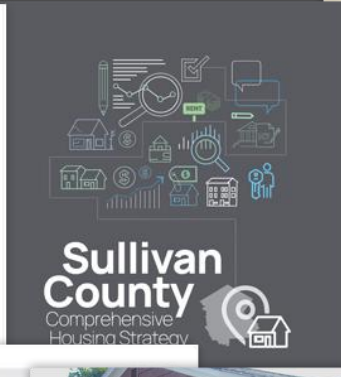
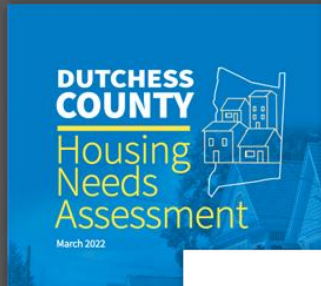
Rochester

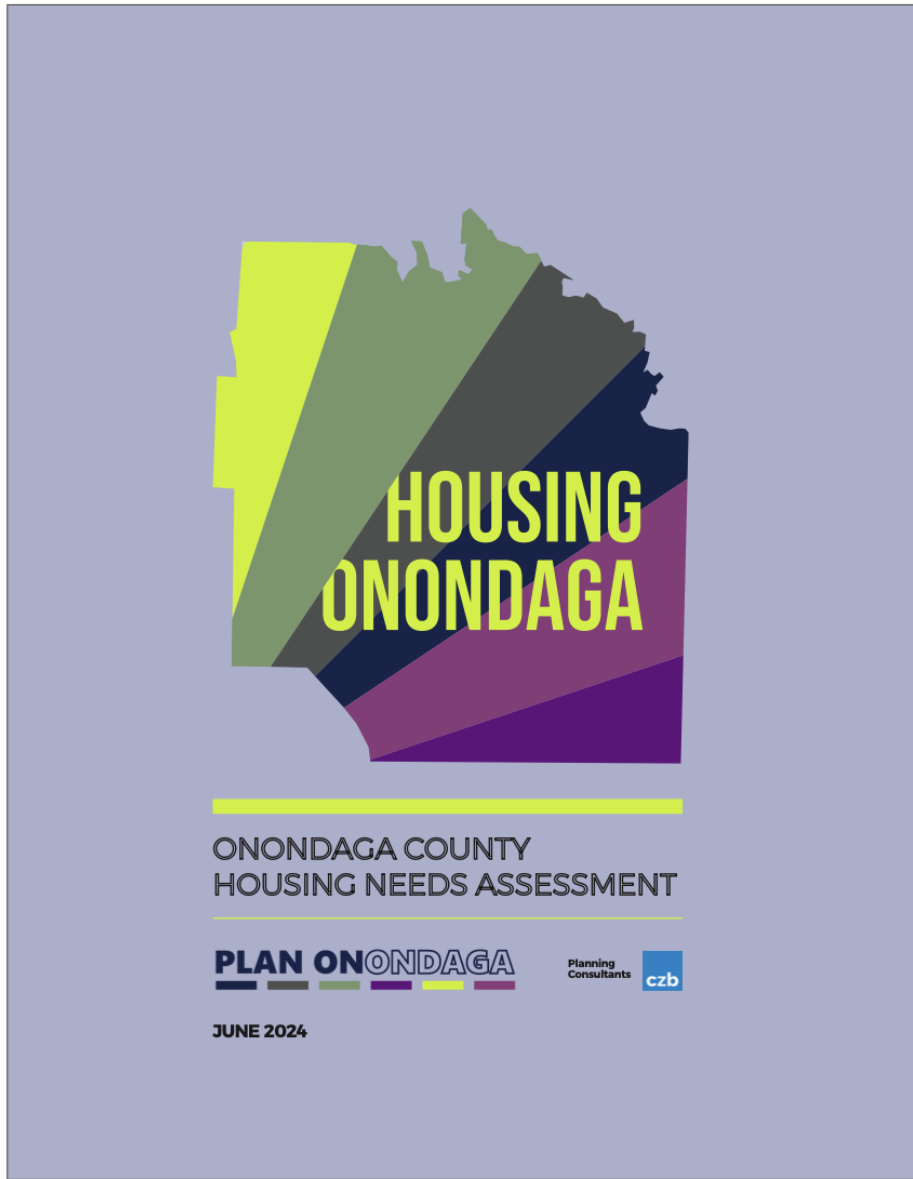
Sullivan County

Syracuse

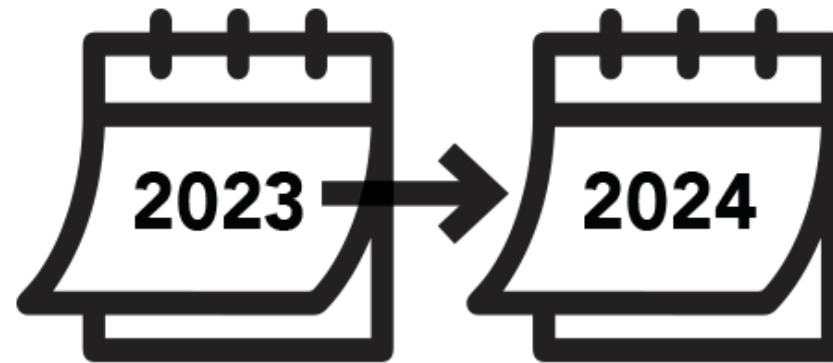
Troy

Utica





# Comprehensive Market Deep Dive



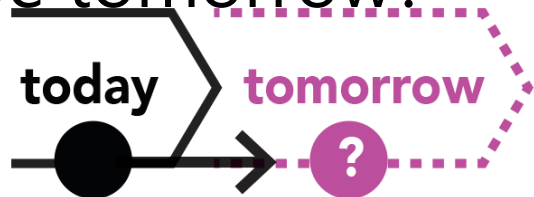
# We spent a year looking at Onondaga County's housing market



## S T O R Y L I N E S T R U C T U R E

### BASELINE & SPECULATIONS

Where is Onondaga today and where could it be tomorrow?



### MICRON IN CONTEXT

What is going on independent of Micron?



### SYRACUSE AND EVERYTHING ELSE

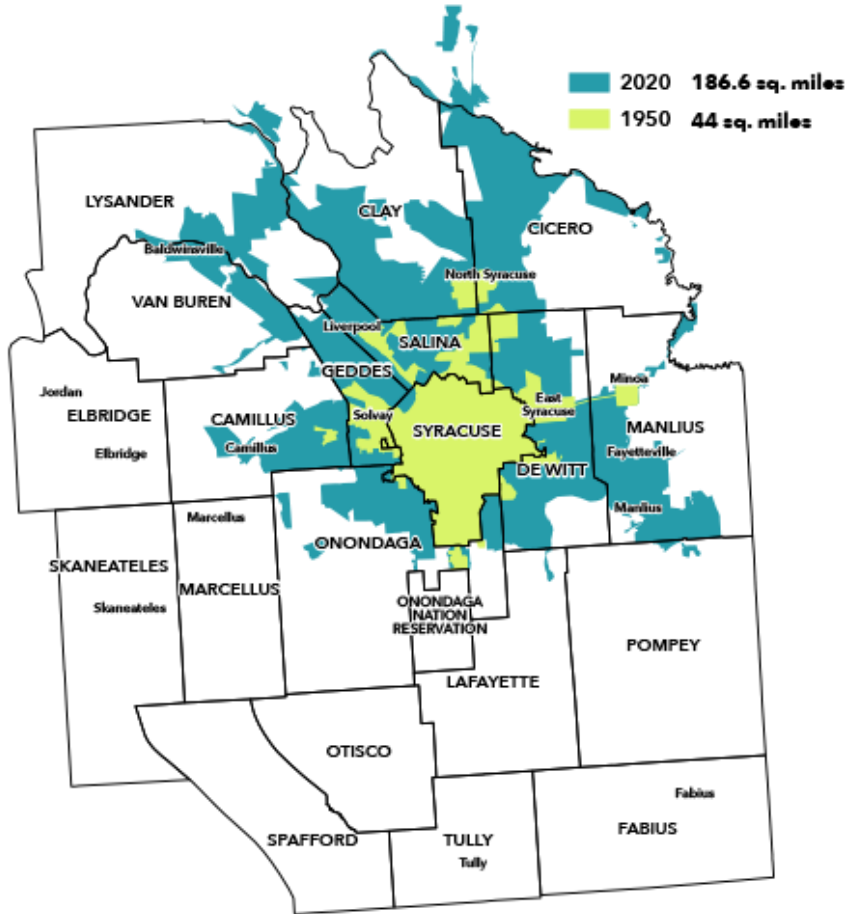
How does Syracuse and the rest of the county look like each other?



# Syracuse as a Distinct Housing Market in Need of its Own Strategy

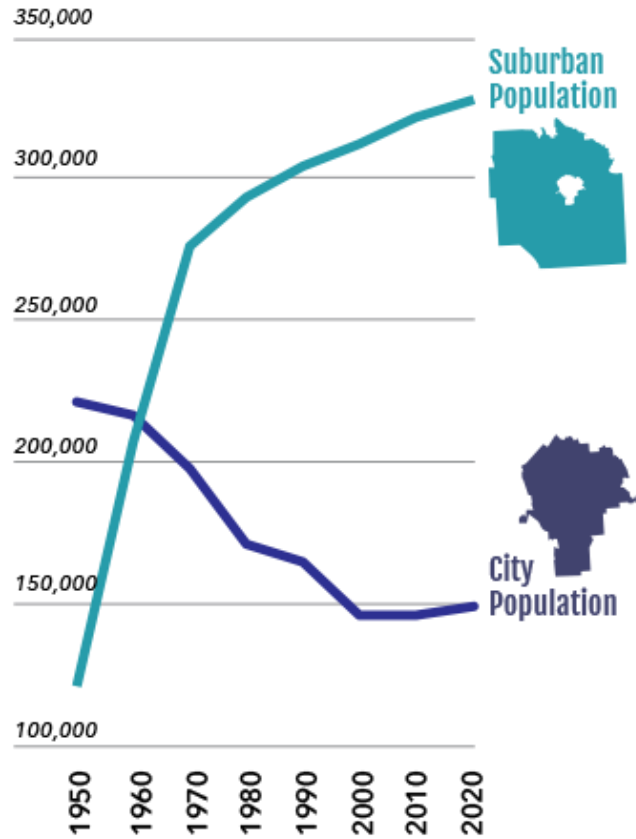


Onondaga County Urbanized Area, 1950 vs. 2020



Source: U.S. Census

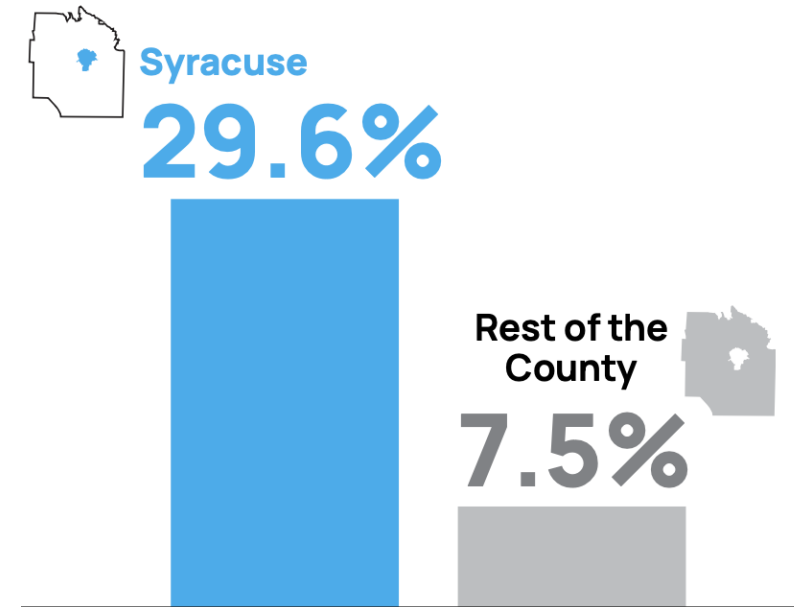
Population of City of Syracuse and the Remainder of Onondaga County Since 1950



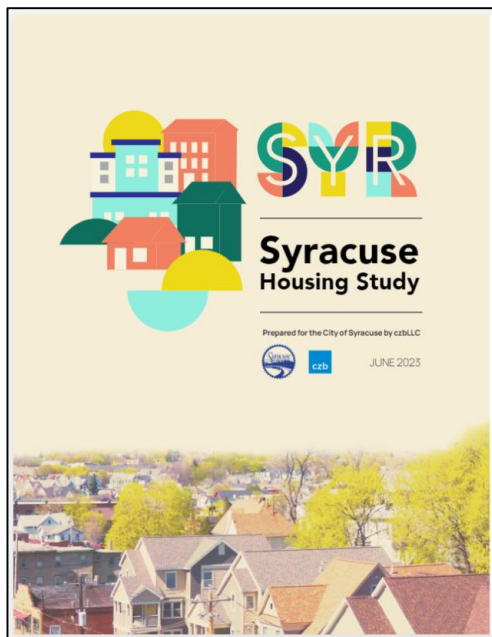
Source: U.S. Census

Poverty Rate, 2022

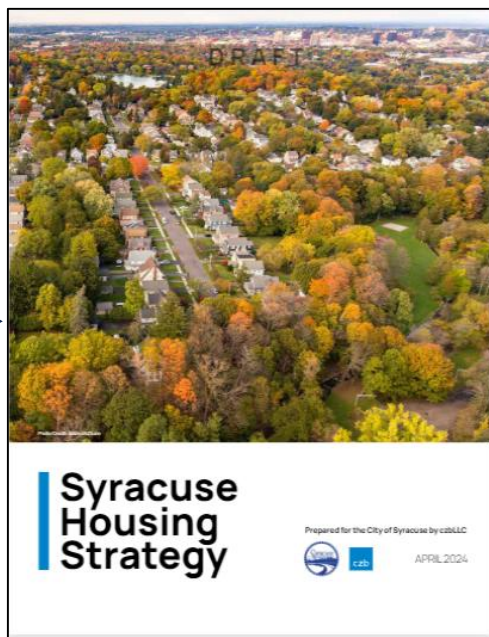
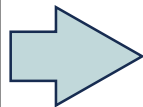
Source: 2018-2022 ACS Five Year Estimates



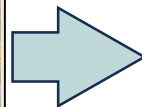
## Syracuse Housing Strategies Corporation – Strong Syracuse Neighborhood Plans



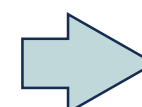
2022-2023



2023-2024



2024-2025



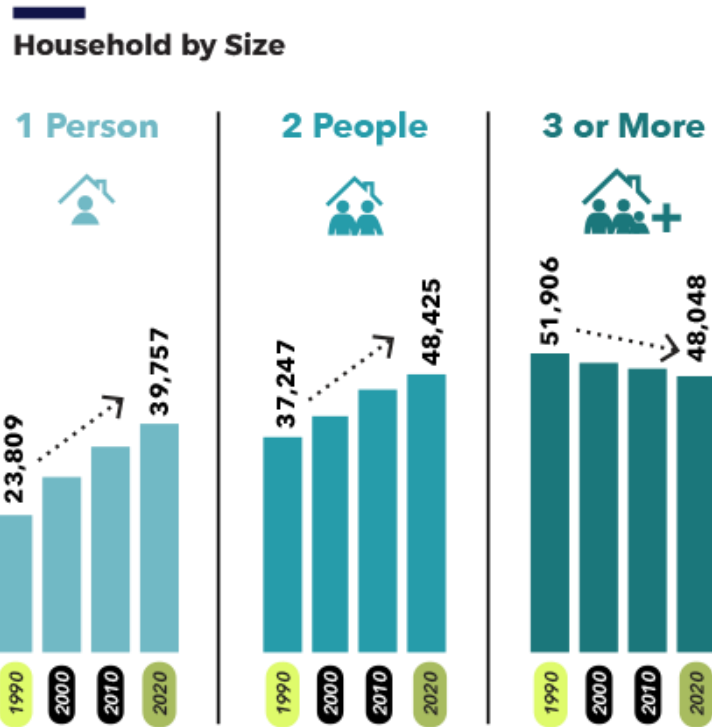
Implementation





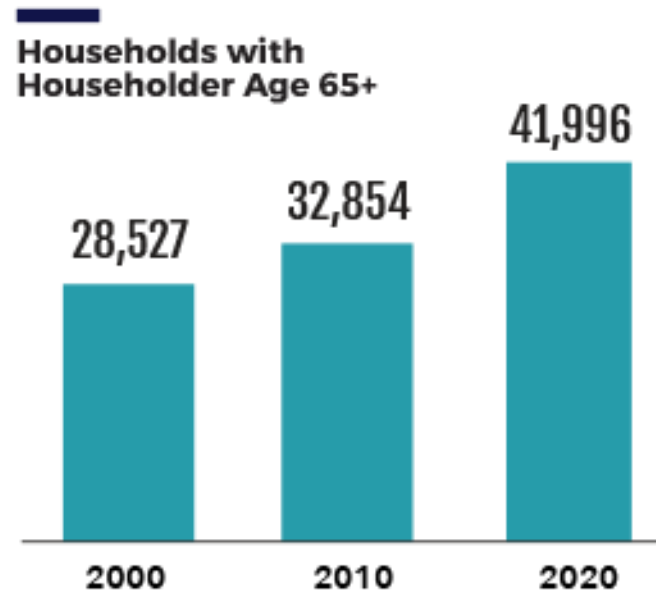
Demographic factors are shaping the market.

### Smaller households.



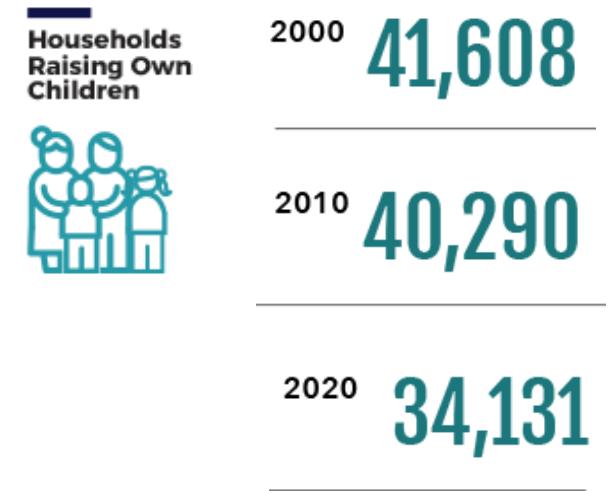
Source: U.S. Census

### Older households.



Source: U.S. Census

### Fewer families with kids.



Source: U.S. Census



# County Housing Market Outside Syracuse

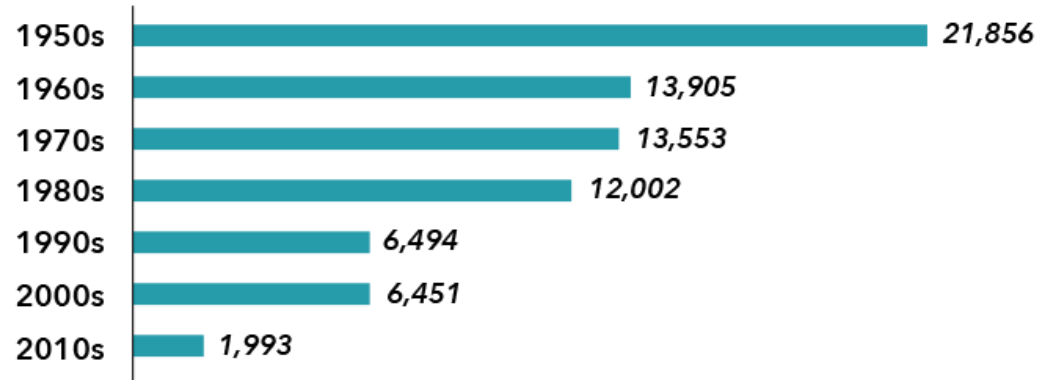


Homeownership has long been dominant, but renting is on the rise.

Homeownership growth slowing.

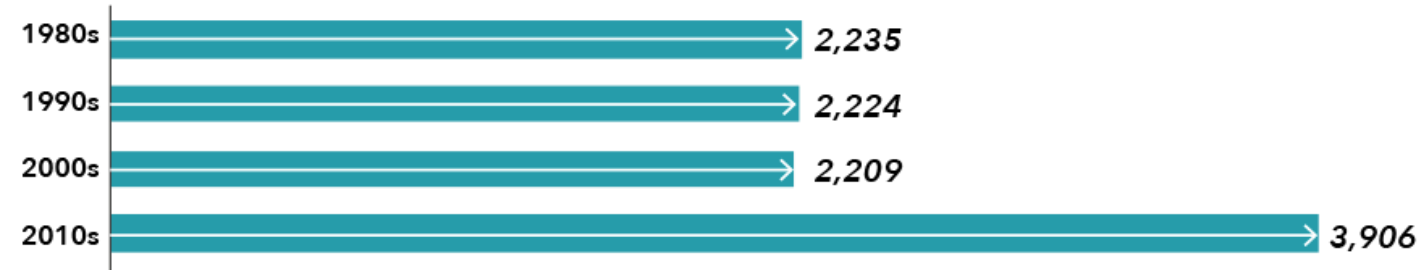
Renter household growth jumped in 2010s.

Increase in Owner Households by Decade



Source: U.S. Census

Increase in Renter Households by Decade



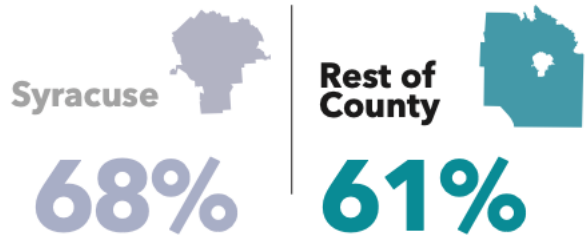
Source: U.S. Census



Mismatched housing supply, and private sector seemingly without capacity to respond.

Small households in large units.

Percentage of Onondaga County Owner Households with One or Two People, 2020



Source: U.S. Decennial Census

## About 100,000 unused suburban bedrooms!

Source: czb Analysis of Data from 2020-2024 ACS Five-Year Estimates

Shortage of alternative ownership options.

## 92% of All Owned Units are Single-Family Detached



### Condos? Townhouses?

Source: U.S. Census

Rental production not keeping up.

New Rental Units Built vs New Renter Households, 2010-2019

	Syracuse	Rest of County
Units	3,140	3,056
Households	3,669	3,906
Difference	-529	-850

Source: U.S. Census and Onondaga County Planning



# County Housing Market Outside Syracuse



## What are some examples of good development types for Onondaga County?

 **Adaptive Re-Use, Mixed-Use with Residential Condos**



Credit: MCK Building Associates, Inc.

 **Adaptive Re-Use, Mixed-Use with Rental Apartments**



Credit: Sutton Real Estate Company

 **New Construction, Mixed-Use with Residential Condos and Rental Apartments**



Credit: Julie Meko, Compass

 **Adaptive Re-Use, Mixed-Use with Residential Condos and Rental Apartments**



Credit: City of Syracuse

 **New Construction, Mixed-Use with Rental Apartments**



Credit: www.eastdalevillage.com

 **New Construction, Mixed-Use with Townhouses and Rental Apartments**



Credit: Hubbell Homes

## Towns, Villages, and City of Syracuse

Control planning, land use, and zoning at the local level, are needed.



- Update Comprehensive Plans
- Update Zoning Codes
- Stringent but Clear Design Standards

## Onondaga County

Public sector actor with greatest local capacity to provide financial incentives and subsidies.



- Formal Housing Policies
- Expand Housing Investment Programs

# HOUSING ONONDAGA IMPLEMENTATION



2026

## Housing Onondaga Implementation Strategy

New project focused on hurdles in the housing production system

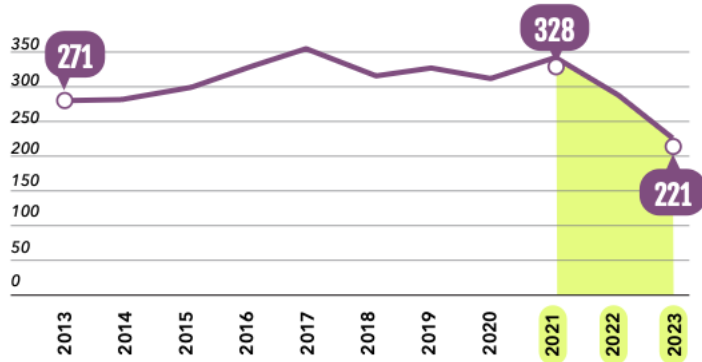
- Market challenges
  - Stuck ownership market
  - Tight rental market outside Syracuse
- Regulatory challenges
  - Local plans and policies
  - Zoning codes and processes

# HOUSING ONONDAGA IMPLEMENTATION

## Market Challenges: Stuck Ownership Market

Declining inventory.

Average Monthly Single-Family Sale Volume by Year, 2013-2023



Source: Real estate transaction data from Onondaga County

More middle-aged owners.

Onondaga County Owners Aged 55-74

YEAR	NUMBER	PERCENTAGE OF ALL OWNER HOUSEHOLDS
2000	34,684	29.7%
2010	42,743	35.2%
2020	53,117	43.7%

Source: czb analysis of data from Decennial Census

Staying in place longer.

Percentage of County Homeowners Aged 55-74 Leaving the Ownership Market, by Decade

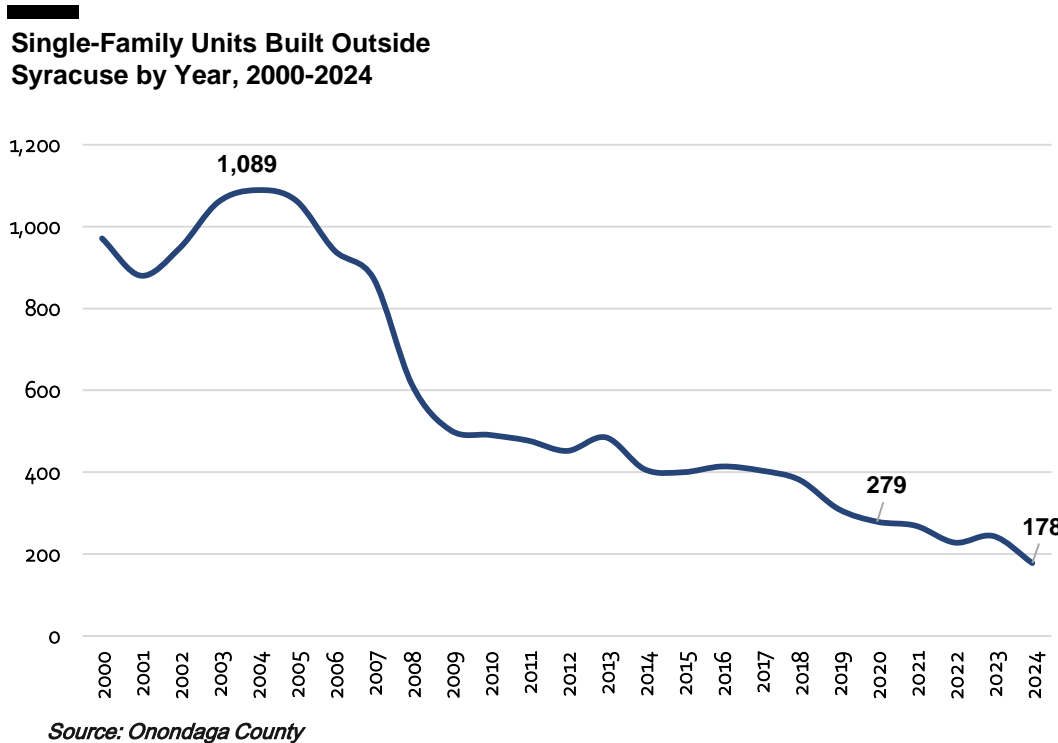
1990s	23.4%	
2000s	20.6%	↓
2010s	16.9%	↓

Source: czb analysis of data from Decennial Census

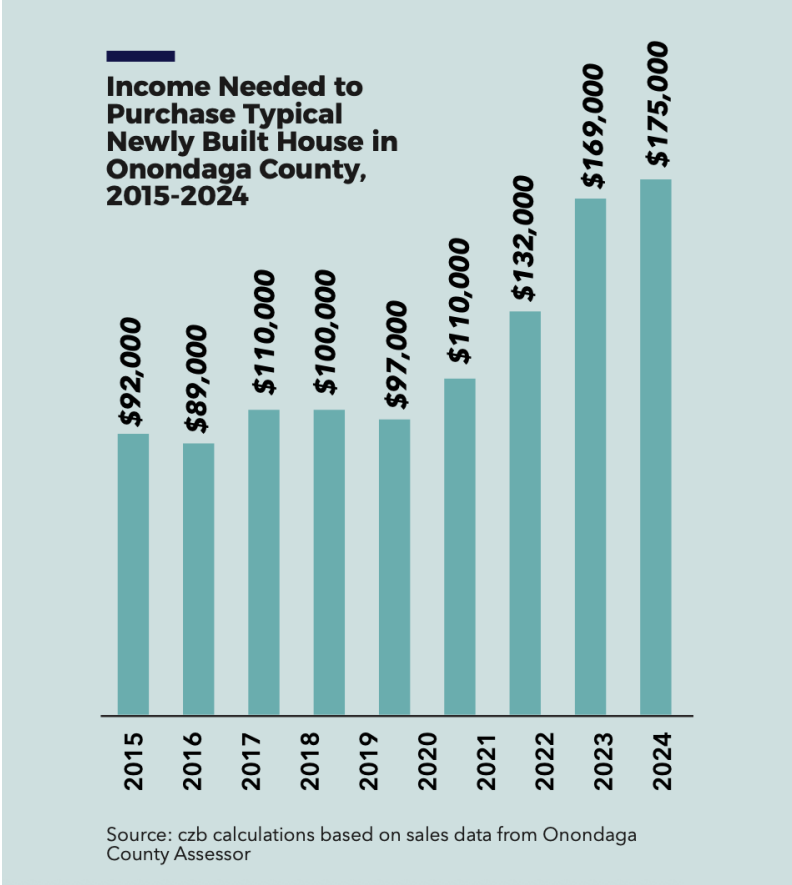
# HOUSING ONONDAGA IMPLEMENTATION

## Market Challenges: Stuck Ownership Market

Homebuilding in decline, not effectively responding.



Costs beyond what market will pay.



# HOUSING ONONDAGA IMPLEMENTATION

## Market Challenges: Tight Rental Market Outside Syracuse

Vacancy rate under 5%.

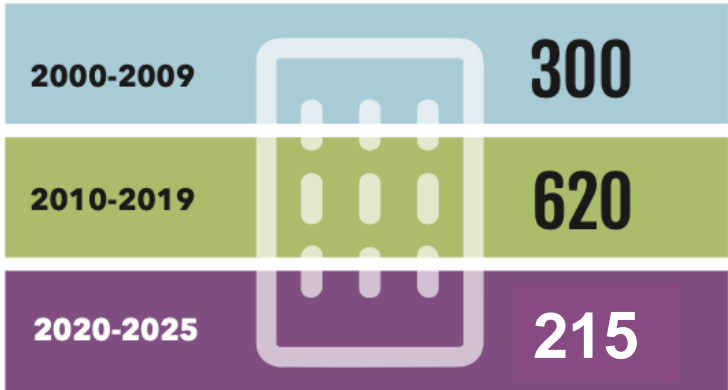
**Multifamily Rental Data, Q1 2026**

	Multifamily Units	Average Rent	Vacancy Rate
Syracuse	24,322	\$1,274	6.6%
Rest of County	20,877	\$1,473	3.1%

*Source: czb analysis of Costar data*

Production slowing.

Average Annual Multifamily Construction

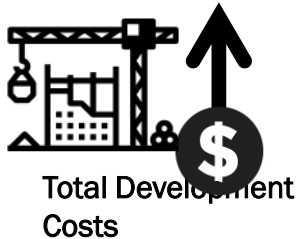


Source: Onondaga County

Costs beyond what market will pay.

Average unit break-even rent of \$3,000+.

No proven capacity to consistently pay such high rents.



# HOUSING ONONDAGA IMPLEMENTATION

## Regulatory Challenges in Common Municipal Practices

### Allowed and conditional uses.

Does your code include districts where the following are allowed without special use permit?

- Single-family with lot sizes as small as 5,000 sq feet?
- Two-unit, three-unit, or four-unit detached homes?
- Attached types from duplexes to townhouses?
- Multi-family structures of 10 units or more?
- Mixed-use with residential?

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### "Holding zones."

Puts potentially developable land into a district with requirements likely to make development infeasible.

Premised on the fact that a rezoning will be required.

Sends a signal that:

- Municipality has not truly planned for housing in these locations.
- Housing development is a gamble.

## Regulatory Challenges in Common Municipal Practices

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- Housing development is a gamble.

### Planned Unit Development as the solution.

For when existing zoning districts and other tools cannot accommodate proposals.

Yes it is flexible, but also discretionary.

The path through PUD is not necessarily clear or easy.

## Towns, Villages, and City of Syracuse

Control planning, land use, and zoning at the local level, are needed.



- Update Comprehensive Plans
- Update Zoning Codes
- Stringent but Clear Design Standards

***IF*** municipality wants to support additional housing development.

Many comp plans, especially more recent, seem to be in support.

Codes are coming along.....

A LOT of new planning and code work has recently been underway.

# HOUSING ONONDAGA IMPLEMENTATION

## Municipalities



### Comprehensive, Corridor, Area, and Neighborhood Plans

- Strategically designed engagement focused on housing development
- Clear housing-supportive policies in the plans
- Future land use map that directs future housing development activity

# HOUSING ONONDAGA IMPLEMENTATION

## Municipalities



## Development Codes

- Zoning districts that allow a variety of housing types by right, not as conditional or special uses:
  - Single-family with lot sizes as small as 5,000 sq feet
  - Two-unit, three-unit, or four-unit detached homes
  - Attached types from duplexes to townhouses
  - Multi-family structures of 10 units or more
  - Mixed-use with residential

# HOUSING ONONDAGA IMPLEMENTATION

## Municipalities



## Development Codes

- Clear Requirements that Minimize Discretion
  - Illustrations and detailed descriptions
  - Standards that can be interpreted by professional planning, zoning, building, code staff
  - Minimal instances of board discretion

## What would success look like for the County when it comes to new housing?

Assuming new County programming is developed, financial gaps can be closed, and local approvals can be secured, what are the development outcomes that can be achieved?

### Development Opportunities

- Countywide parcel analysis – infrastructure, parcel size, location
- Context – not every development type is appropriate for every location
  - Respect surrounding area
  - Build neighborhoods and high-quality places

# HOUSING ONONDAGA IMPLEMENTATION

## Selection of Site Types

### Greenfield Sites

- Vacant parcels (large and small categories)
- Sewer service area
- Clustered most closely in rural and suburban Towns

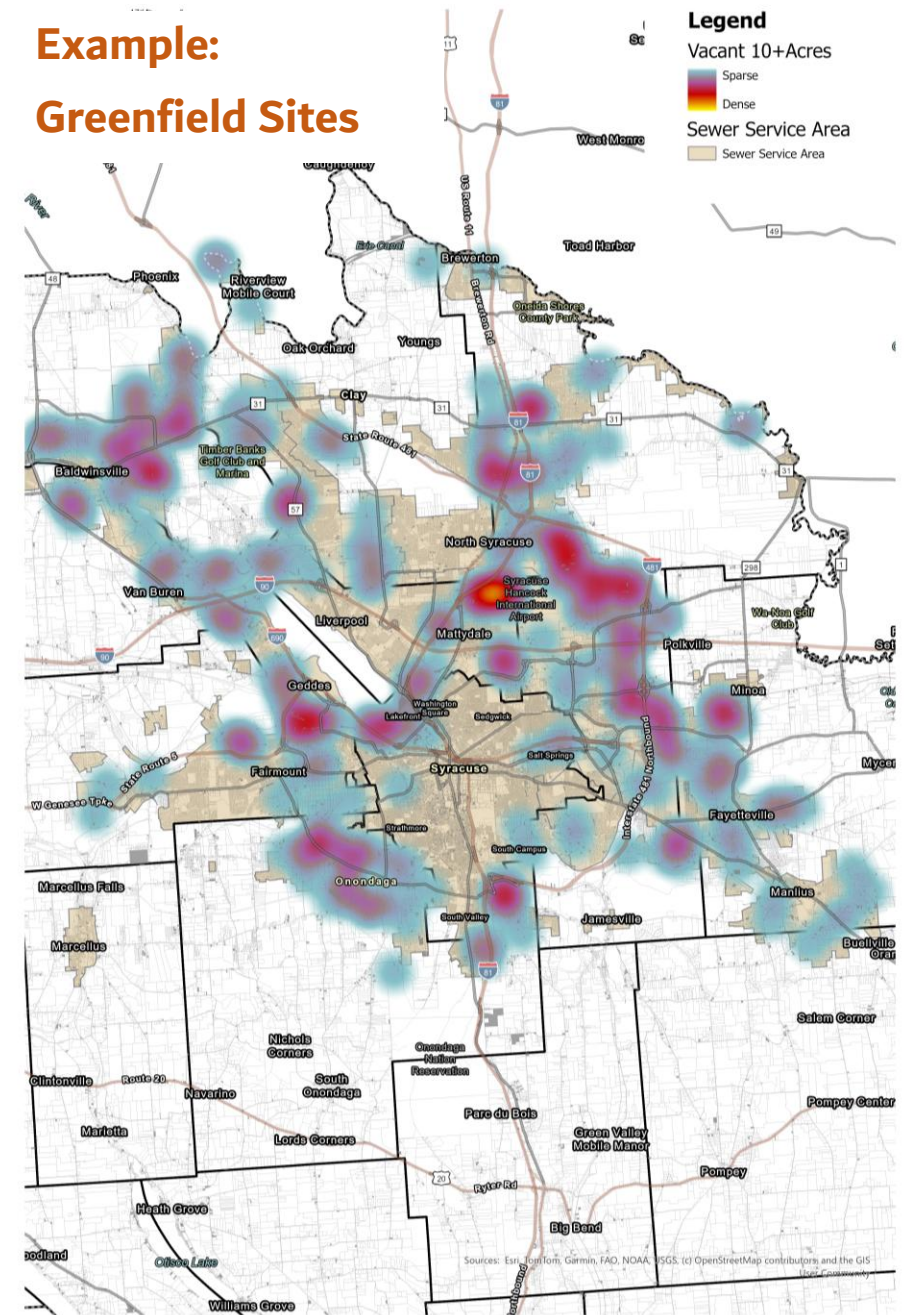
### Aging Suburban Commercial Properties

- Underutilized parcels (shopping centers, retail outlets, office buildings)
- Improvement-to-land value ratio
- E.g. Route 11, Route 31, Route 57, Erie Blvd, Genesee St, Buckley Rd

### Village infill sites

- Vacant parcels (neighborhood and "Main Street" categories)
- Sewer service area

## Example: Greenfield Sites



# HOUSING ONONDAGA IMPLEMENTATION

## Development Types

The Development Types are specific to the four categories of housing that should be considered for each of the Site Types. These include:

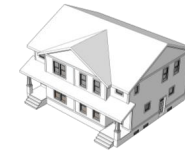
### Development Type 1: TND Cluster Subdivision

- Best match for Greenfield Sites



### Development Type 2: Missing Middle

- Best match for Greenfield Sites and Village Neighborhood Infill Sites



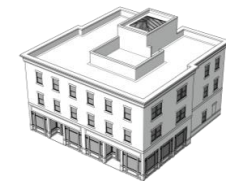
### Development Type 3: Multi-unit

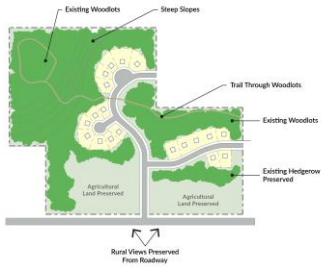
- Best match for aging suburban commercial properties



### Development Type 4: Mixed-Use

- Best match for aging suburban commercial properties and village “Main Street” infill sites





Development Type 1

# TND Cluster Subdivision

Best match for Greenfield Sites

## Description

Residential development in which homes are subdivided on smaller lots to preserve open space, natural features, or shared community areas on the remaining land.



## Typical Physical Characteristics

### Lots

- Min lot area: 3,500 sf - 7,500 sf
- Max Width: 75 ft
- Max Depth: 100 ft
- Open Space: 15%-25%
- Primary street setback range: 0 ft - 15 ft

### Buildings

- Maximum height: 2.5 stories/35 ft
- Entrances: Oriented to the primary street with connected walkways

### Parking

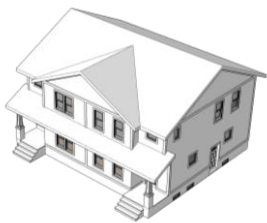
- Spaces: 0-2 per unit based on context
- Location: Rear or side yards

### Other

- Recreational trails, sidewalks, interconnected pedestrian network, park connections

### Suitable Zoning Districts

- Traditional Neighborhood Development
- Cluster Subdivision



Development Type 2

## Missing Middle

Best match for Greenfield Sites and Neighborhood Village Infill Sites

### Description

House-scale buildings with multiple units including duplexes, triplexes, townhomes and quadplexes in walkable neighborhoods.



### Typical Physical Characteristics

#### Lots

- Min lot area: 2,000 sf - 6,000 sf
- Max lot coverage: 50% -75%
- Primary street setback range: 0 ft - 15 ft

#### Buildings

- Max height: 2-3 stories/45 ft
- Entrances: Oriented to the primary street with connected walkways

#### Parking

- Spaces: 0-2 per unit based on context
- Location: Rear or side yards

#### Suitable Zoning Districts

- All Residential, As Desirable
- Mixed-use
- Traditional Neighborhood Development



Development Type 3

## Multi-Unit Residential

Best Match for Underutilized Suburban Commercial Sites

### Description

Residential development containing 12 or more housing units in a single building.



### Typical Physical Characteristics

#### Lots

- Min lot area: 4,000 sf - 8,000 sf
- Max lot coverage: 40% -60%
- Primary street setback range: 15-25 ft

#### Buildings

- Max height: 3-5 stories or 42-68 ft
- Entrances: Oriented to the primary street with connected walkways

#### Parking

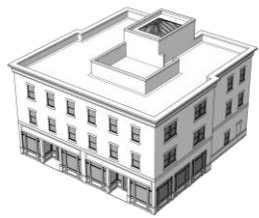
- Spaces: 0-2 per unit based on context
- Location: Rear or side yards

#### Other

- Internal street grid
- Pedestrian-friendly and landscaped parking
- Entrances connected to sidewalks

#### Suitable Zoning Districts

- Multi-unit / Multi-family Residential
- Mixed Residential
- Mixed-use



Development Type 4

## Mixed-Use

Best Match for Underutilized Suburban Commercial Sites and Village “Main Street” Infill Sites

### Description

Multiple land uses either in horizontal or vertical development.



### Typical Physical Characteristics

#### Lots

- Min lot area: 3,000 sf - 15,000 sf
- Max lot coverage: 60% -75%
- Build-to-zone (min/max): 0 ft - 25 ft

#### Buildings

- Max height: 3-5 stories or 42-68 ft
- Transparency: 50-60% first floor, 25-30% upper
- Composition: Defined base, mid-section, and crown
- Entrances: Oriented to the primary street with connected walkways

#### Parking

- Spaces: Based on land use mix
- Location: Rear or side yards

#### Other

- Additional design or development standards

#### Suitable Zoning Districts

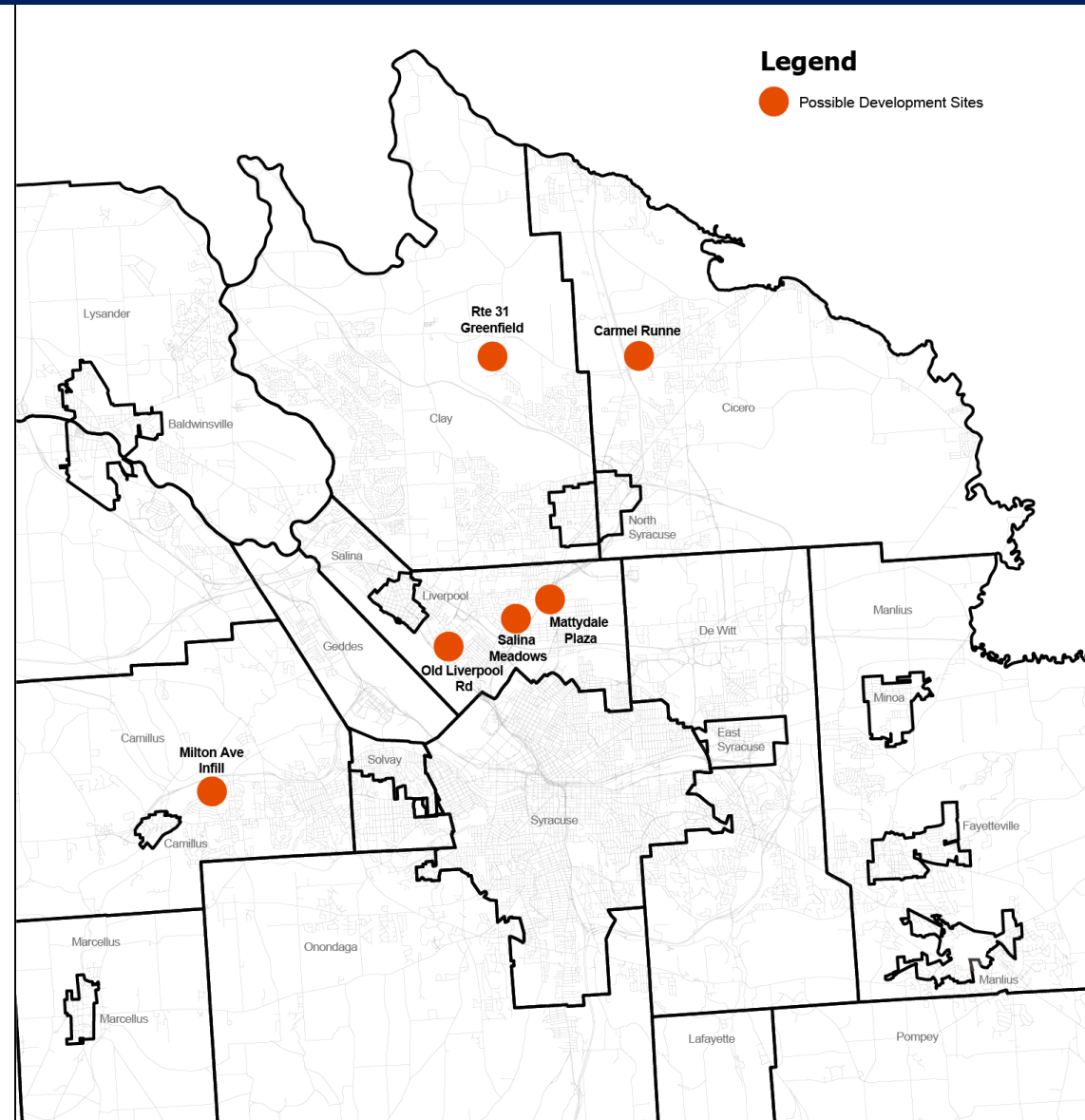
- Main Streets
- Mixed-use
- Commercial Corridors

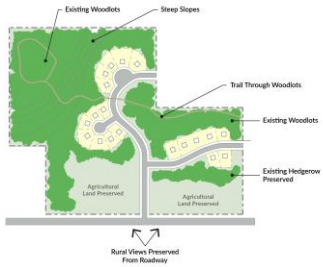
# HOUSING ONONDAGA IMPLEMENTATION

## Bringing Site Types and Development Types Together: Envisioning New Housing Development

Commonalities of identified locations:

- Within or adjacent to the existing sewer service area;
- NOT within or adjacent to existing wetlands or environmentally sensitive areas;
- Vacant or underutilized properties; and
- Located within 20 miles of the Micron site.





Example: Greenfield Site

## TND Cluster Subdivision

Traditional Neighborhood Development with Cluster Characteristics

### Development Response

The representative graphics convey how this type can be applied to greenfield locations within Onondaga County. TND cluster subdivision functions well for greenfield development in areas with available vacant and undeveloped land. Single-unit homes are shown on smaller lots to maximize available land. Open space is preserved as well as integrated into the residential developments via pedestrian trails. Street trees and sidewalk are both prioritized to provide a comfortable environment for pedestrians.

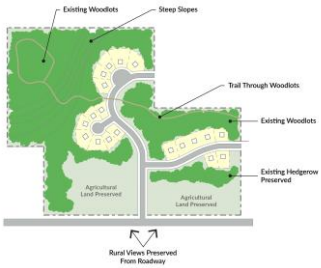
### Site 1: Rt. 31 North

In the Town's comprehensive plan, this greenfield site is identified as ideal to include as part of a new Town Center.

- The site currently falls under the General Commercial (GC) district. If the Town pursues residential development in this location, it will require zoning amendments.

Route 31 North





Example: Greenfield Site

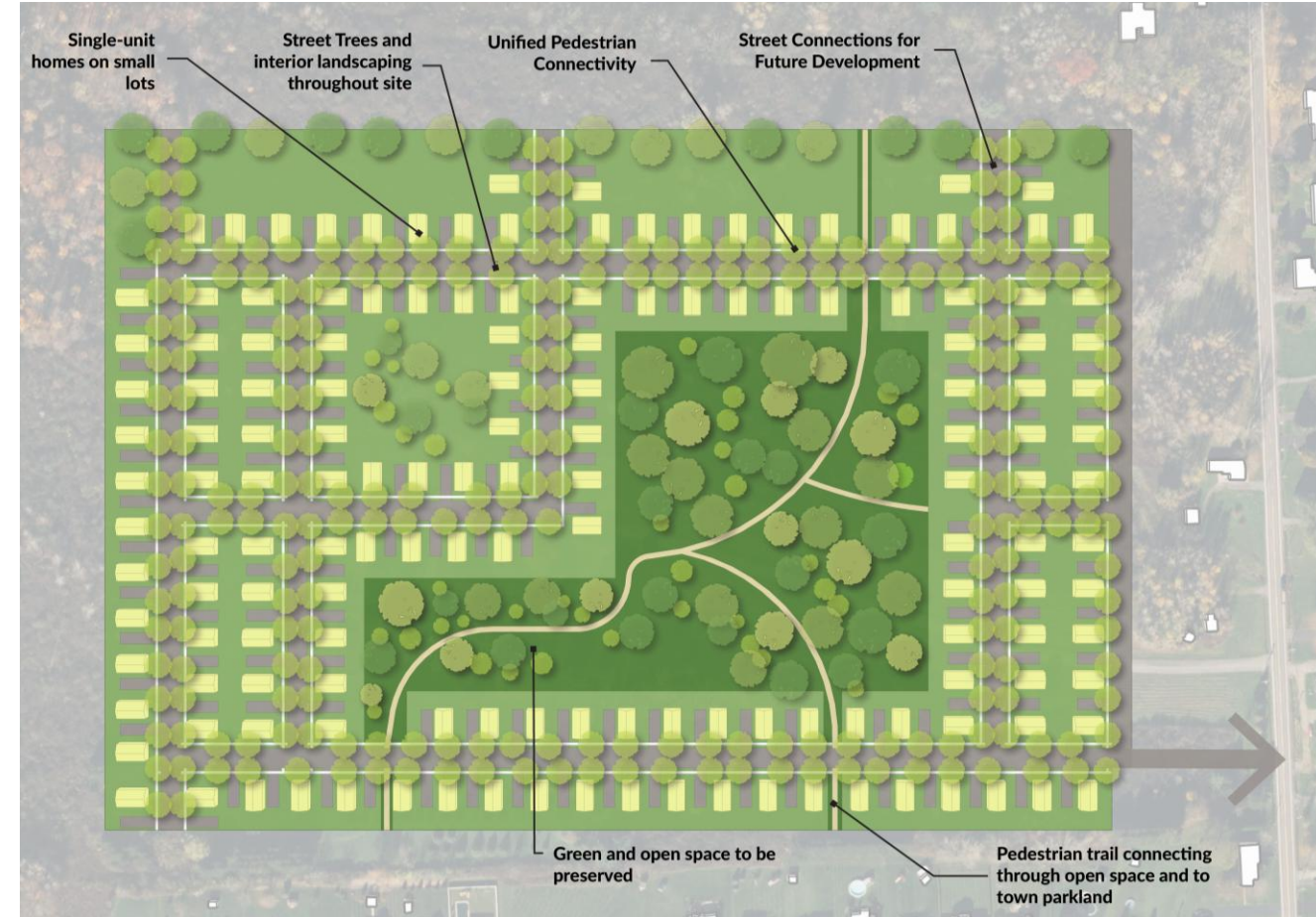
## TND Cluster Subdivision

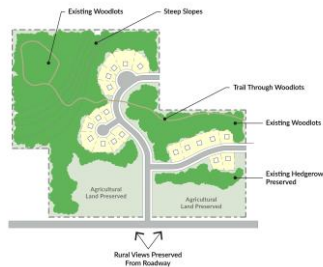
Traditional Neighborhood Development with Cluster Characteristics

### Site 2: Route 31 South

- This is a greenfield site with infrastructure access, including roadway access along Caughdenoy Road, but no coherent development pattern in the vicinity.
- Located near emerging retail and employment nodes, the site could be developed into a clustered subdivision of single-family homes on a range of lot sizes.
- The current zoning for this site is the Residential-Agricultural (RA-100). This would require zoning amendments if smaller residential lots in a traditional neighborhood development (TND) with open space requirements are desired.

Route 31 South





Example: Greenfield Site

## TND Cluster Subdivision

Traditional Neighborhood Development with Cluster Characteristics

*Route 31 South*



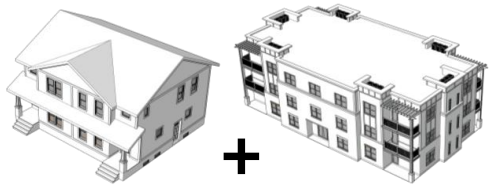
**What would be needed to help this opportunity come to life?**

### Suitable Zoning Districts

- Traditional Neighborhood Development
- Cluster Subdivision

### Important Considerations

- The site's underlying zoning district must allow for single-unit residential development on small lots (less than 5,000 sf)
- Lots no deeper than 100 feet and no wider than 50 feet
- Shared open space of at least 25%
- Interconnected pedestrian network
- Compact street design with on-street parking
- Trails should connect to adjacent parks
- Internal streets should connect in a grid-like manner wherever possible or practical and/or should respond to topographical / natural features



Example: Greenfield Site

## Missing Middle + Multi-Unit

Three Story Townhouses with Four-story Multi-unit Buildings

### Development Response

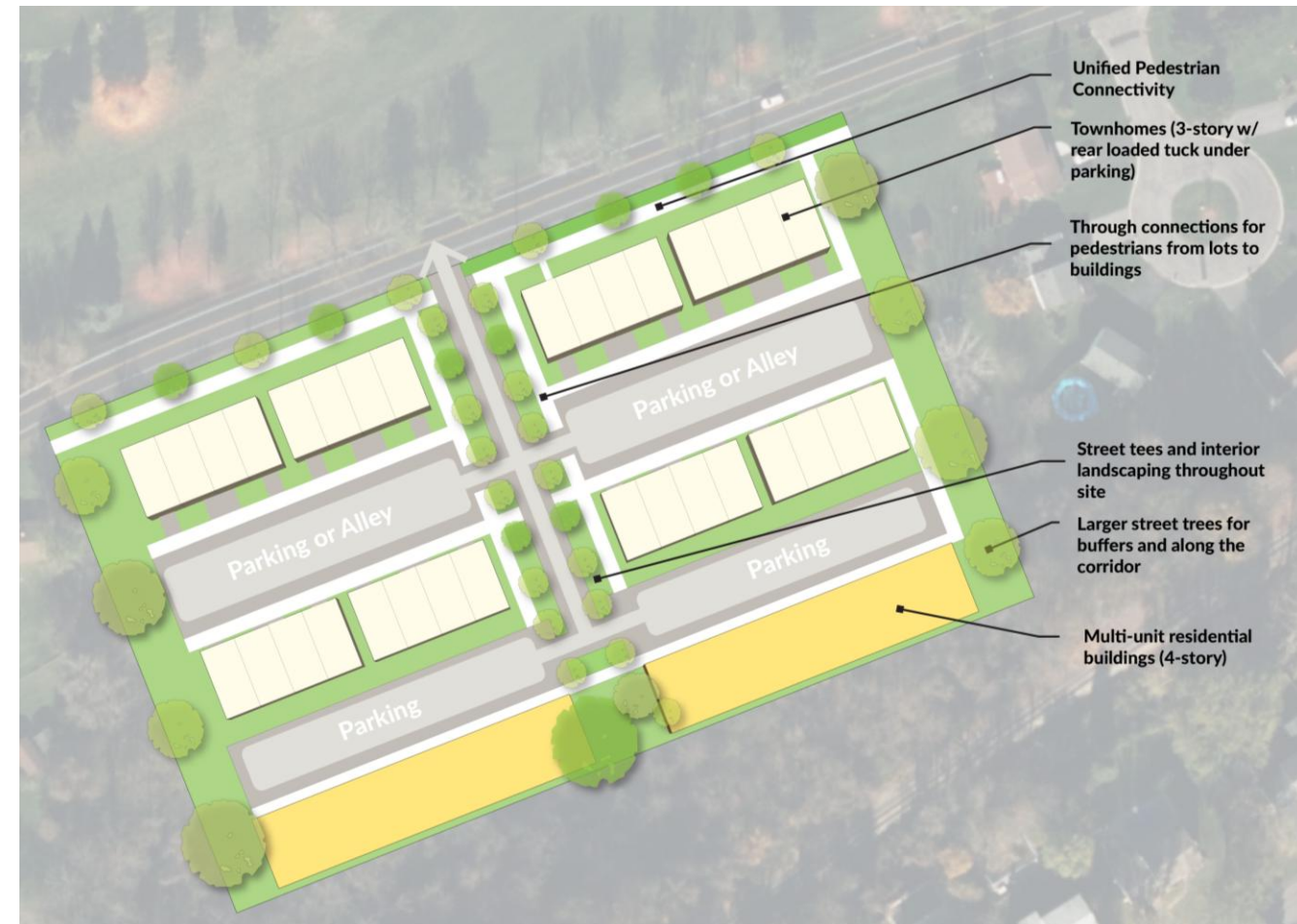
This development concept includes both missing-middle and multi-unit development types and convey how a site can be developed to include both types in a way that encourages housing variety, walkability, infill development, and other considerations.

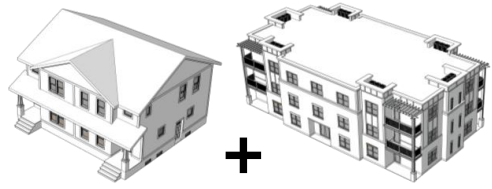
### Site 3: Milton Ave Infill Site

The greenfield site shown is on the southern side of Milton Avenue in the Town of Camillus, slightly northeast of the Village of Camillus.

- Most of the existing development along this stretch of Milton Avenue is residential in nature, and it is across from one of the Town's golf courses.
- The site currently falls under a residential (R3) district, which does not currently permit multi-unit residential. If the Town pursues multi-unit development in this location, it will require zoning amendments.

*Milton Ave*





Example: Greenfield Site

## Missing Middle + Multi-Unit

Three Story Townhouses with Four-story Multi-unit Buildings

*Milton Ave*



**What would be needed to help this opportunity come to life?**

### Suitable Zoning Districts

- Mixed Residential
- Multi-unit / Multi-family Residential
- Mixed-use

### Important Considerations

- The site's underlying zoning district must allow for mixed residential development
- Building height – 4-5 stories [max]
- Entrances - oriented to the primary street
- Lot coverage – 60% [max]
- Parking located to the side or rear with tree islands
- Rear loaded garages via alley
- Interconnected pedestrian network
- Internal streets should connect in a grid-like manner wherever possible or practical and/or should respond to topographical / natural features



Example: Aging Suburban Commercial Properties

## Missing Middle + Multi-Unit + Mixed-Use

Re-envisioning a suburban office park

### Development Response

The concept plan includes several multi-unit buildings ranging between 2-4 stories. White buildings are existing buildings and show how an older office park could be redeveloped into a multi-unit residential site. Interior sidewalks, landscaping, and green space combine to address walkability and pedestrian comfort. Larger and more complex sites like this are best suited for master planning.

### Site 4: Salina Meadows

- A low-density office park with stable tenancy but declining relevance in a post-COVID market.
- The site's scale, access, and adjacency to Route 11 and the Thruway make it ideal for phased redevelopment into a residential development in a campus-like setting.
- Current zoning restricts residential use and enforces outdated bulk and use standards. A targeted mixed-use district or planned development overlay could enable conversion while preserving employment anchors, and done so in a context sensitive manner with respect to neighboring low-density blocks

Salina Meadows





Example: Aging Suburban Commercial Properties

## Missing Middle + Multi-Unit + Mixed-Use

Re-envisioning a suburban office park

*Salina Meadows*



**What would be needed to help this opportunity come to life?**

### Suitable Zoning Districts

- Mixed-use

### Important Considerations

- The site's underlying zoning district must allow for both horizontal and vertical mixed-use development
- Building height – 4-5 stories [max]
- Transparency – 40-50% ground floor, 25-30% upper floors
- Entrances - oriented to the primary street
- Lot coverage – 60% [max]
- Parking located to the side or rear with tree islands
- Compact street design with on-street parking
- Rear loaded garages via alley
- Interconnected pedestrian network
- Internal streets should connect in a grid-like manner wherever possible or practical and/or should respond to topographical / natural features



Example: Aging Suburban Commercial Properties

## Missing Middle + Multi-Unit + Mixed-Use

Re-envisioning an underutilized commercial site

### Development Response

This concept includes several 3-4-story multi-unit and mixed-use buildings with a mix of single-unit and missing-middle housing in the back. Interior sidewalks and landscaping combine to address walkability and pedestrian comfort. This would be ideally applied along existing retail or mixed-use corridors where active ground-floor land uses are encouraged.

### Site 5: Old Liverpool Road

- Old Liverpool Road is a fragmented industrial corridor with aging flex buildings and underutilized parcels.
  - Located between Destiny USA, Salina Town Center, and residential neighborhoods, the corridor has strategic access.
- The corridor could support a residential a combination of market-rate and with workforce housing, service retail, and even light industrial.
- Zoning reform should allow residential adjacency, flexible block configurations, and reduced setbacks to support corridor-scale revitalization.

*Old Liverpool Road*





Example: Aging Suburban Commercial Properties

## Missing Middle + Multi-Unit + Mixed-Use

Re-envisioning an underutilized commercial site

*Old Liverpool Road*



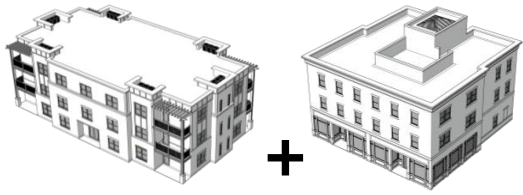
**What would be needed to help this opportunity come to life?**

### Suitable Zoning Districts

- Mixed-use

### Important Considerations

- The site's underlying zoning district must allow for both horizontal and vertical mixed-use development
- Building height – 4-5 stories [max]
- Transparency – 40-50% ground floor, 25-30% upper floors
- Entrances - oriented to the primary street
- Lot coverage – 60% [max]
- Parking located to the side or rear with tree islands
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Example: Aging Suburban Commercial Properties

## Multi-Unit + Mixed-Use

Redevelopment of a vacant commercial strip plaza site

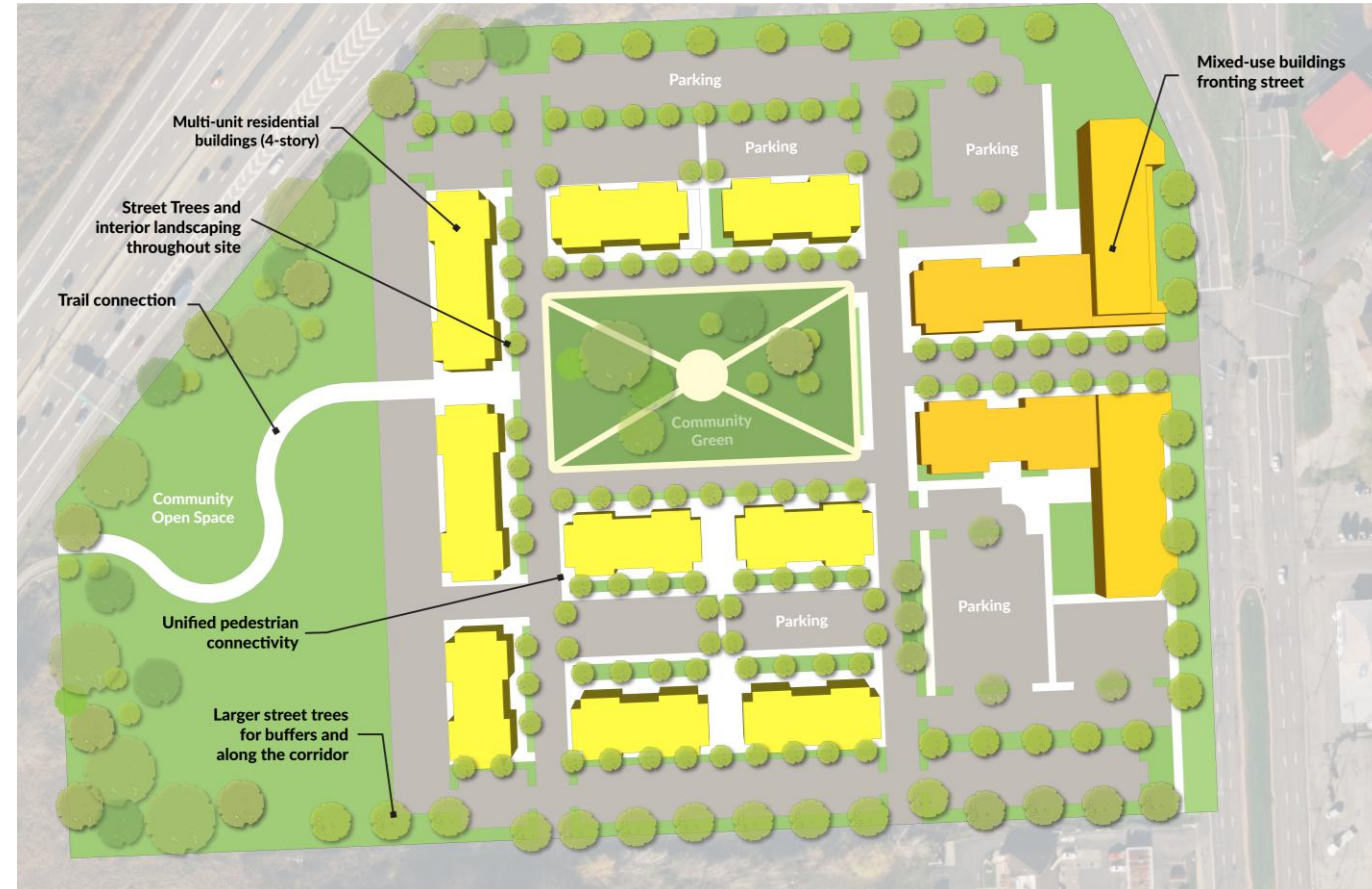
### Development Response

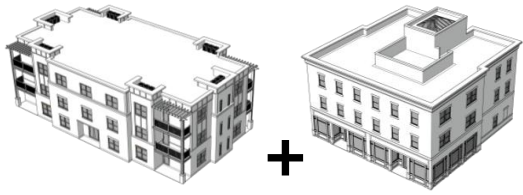
This concept includes several 3-4-story multi-unit and mixed-use buildings with a community green and access to the Bear Trap Creek Bikeway. Interior sidewalks and landscaping combine to address walkability and pedestrian comfort. This would be ideally applied to vacant or underutilized sites near or along commercial corridors.

### Site 6: Mattydale Plaza (Town of Salina)

- Legacy strip center along Route 11 with deep parcels, fragmented ownership, and aging commercial tenants.
- The site underperforms relative to its location and scale.
- It sits at a key corridor node with transit access and proximity to residential neighborhoods.
- The site is well-suited for a mixed-use redevelopment with multifamily over retail, internal block structure, and public realm upgrades. Current zoning favors single-use commercial and auto-oriented design. A form-based overlay allowing vertical mixed-use and reduced parking minimums would unlock reinvestment when paired with gap financing.

*Mattydale Plaza*





Example: Aging Suburban Commercial Properties

## Multi-Unit + Mixed-Use

Redevelopment of a vacant commercial strip plaza site

*Mattydale Plaza*



**What would be needed to help this opportunity come to life?**

### Suitable Zoning Districts

- Mixed-use

### Important Considerations

- The site's underlying zoning district must allow for both horizontal and vertical mixed-use development
- Building height – 4-5 stories [max]
- Transparency – 40-50% ground floor, 25-30% upper floors
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# HOUSING ONONDAGA IMPLEMENTATION

## Why build “places?”

### • Choices / Options

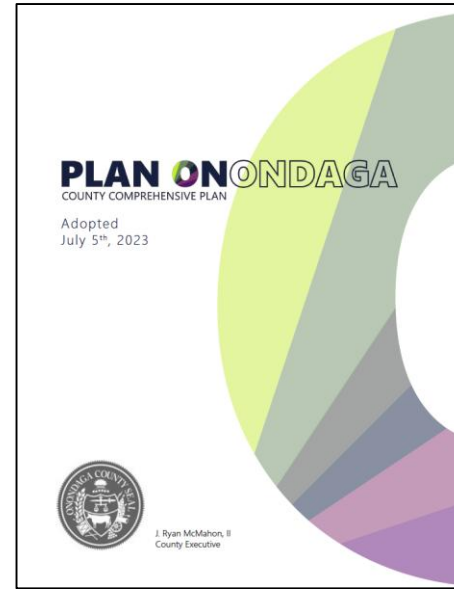
- Different people want different things
  - Mix housing types
  - Mode of travel
    - Walk / bike / drive

### • Lasting Value

- Value per acre is higher
- Greater social cohesion and neighborhood identity
- Shorter trips for errands and services

### • Consistency with Plan Onondaga

- Relevant Goals
  - Expand housing choice
  - Support and enhance the County’s housing and neighborhoods
- Relevant Strategies
  - Help municipalities bridge the gap to implement changes to regs to expand permitted housing
  - Plan for, codify and demand the amenities and quality of life infrastructure
  - Help prioritize housing individuals over cars



### Strong Centers

Strong centers are walkable, people oriented places with a mix of jobs, housing, shopping, dining, culture, public spaces, entertainment, transportation, and services.

#### Vision:

Onondaga County will strengthen the quality of life and economic stability of local communities through the development of amenity-rich, vibrant, and walkable centers.



### Housing and Neighborhoods

Housing and Neighborhoods as a planning theme addresses the needs and desires people have for the structures and places where they live.

#### Vision:

Onondaga County will support affordable, attractive, diverse, and efficient housing and neighborhoods to retain and attract future residents.



### Community Mobility

Community Mobility is the ability of people to travel from place to place within Onondaga County. Community mobility strategies aim to provide for more choice in the transportation system and to improve safety for all users.

#### Vision:

Onondaga County will enhance mobility by improving the safety, accessibility, and diversity of options for moving people within and between communities.



### Greenways and Blueways

Greenways and blueways are corridors of open space or waterways that incorporate diverse natural, cultural, and scenic features.

#### Vision:

Onondaga County will protect and expand greenways and blueways to provide unique recreation and ecological health opportunities.



## What can towns and villages do?

- **Initiate planning processes that have meaningful community conversations about what people want and what they don't want**
  - Show options and focus on desired outcomes
- **Update land use codes / regulations to reflect the plan**
  - Reward projects that give you what you want through a by-right and speedy approval process and don't be afraid to set high standards.
  - From a housing standpoint consider:
    - Allowing more housing types in more districts, lower minimum lot sizes, and permitting ADUs.
- **Work with county staff to help**



## QUESTIONS AND DISCUSSION