CITY OF AUSTIN

BEST PRACTICES IN DEVELOPMENT REVIEW: FASTER! SMOOTHER! SMARTER!

IMAGINEAUSTIN
SPEAKER SERIES

Planning and Development Review Dept. | CodeNEXT

We wish to acknowledge the following individuals who helped to make this event a tremendous success:

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Congress for the New Urbanism – Central Texas   Urban Land Institute – Austin

Land Development Code Advisory Group Members

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Overview

More than 75 years of combined experience contributed to an extraordinary panel discussing improvements that can be made to improve the development review process. *Best Practices in Development Review: Smoother! Faster! Smarter!* is the most recent event in the Imagine Austin Compact & Connected Speaker Series, and convened a panel of Former Planning Directors, Consultants, an Attorney and a present Planning Manager. The panelists' ideas centered on staff morale and restructuring, discussions of the merit of pay-for-review systems, logjams with multiple levels of legislative approval, changes to the citizen comment period, and better cooperation between developers and citizens.

Many of the ideas discussed in the panel—whose members spoke openly at four sessions to community, staff, board/commission members, and the development community—are not new. In fact, Panelist Paul Zucker shared a report he co-authored in 1987 which details recommendations through ordinances, building trust, positivity and education.[1]

> "We can bring all of the [national best practices] to Austin, but, all of them won't work in Austin." Paul Zucker stated during a session. His words are important to remember while reading through the recommendations, as what works in one city may not be feasible for Austin, and one recommendation may not compliment another regulatory or legislative change.

The panel included:

> **LaShondra Homes Stringfellow**, present Planning Manager with the City of Dallas' Sustainable Development Department;

> **Peter Park**, a sub-consultant of the Opticos Consultant Team working on the Land Development Code Revision and Former Planning Director of Denver, CO, and Milwaukee, WI;

> **Mark White** a Planner and Attorney by training and Partner at White & Smith, LLC, Planning and Law Group he has written the American Planning Association's model land development code; and

> **Paul Zucker**, Founder of Zucker Systems a management consulting agency and Former Planning Director of Tucson, AZ, Marin Co, CA and Brookline, MA.

The following summarize the questions asked by moderator Larry Schooler (City of Austin Public Information Office) to the panelists. Questions began with queries written by PDRD CodeNEXT Staff and all audience members were invited to submit written questions to the panel. Following the panel, panelists hosted small group breakout sessions, supported by Land Development Code Advisory Group members and a City Staff note taker. A full recording of the panel session is available on the Imagine Austin Speaker Series blog at http://www.austintexas.gov/blog/linking-imagine-austins-vision-reality-best-practices-development-review-panel and notes from the breakout sessions are presented further in this report.

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[1] Counts, Richard, Christopher Duerksen, Charles Kaplan, Michael Shibley and Paul Zucker. Improving the Development Regulatory Process in Austin, Texas. City Managers Review Panel. Mar 1987.

Executive Summary

In October 2013 four recognized experts in development review process brought their knowledge to the *Best Practices in Development Review: Smoother! Faster! Smarter!* panel. Organized as part of the Imagine Austin Speaker Series, this panel met with nearly 200 individuals over their two days in Austin to share insight on improving the development review process. The full report shares brief biographies of panelists LaShondra Holmes Stringfellow, Peter Park, Mark White and Paul Zucker; provides detailed answers to questions asked at the public panel; reveals involved conversations between panelists and community members from breakout sessions; and shares the Best Practices documents which each panelist submitted after the event.

Major takeaway points involved technology, reducing timelines and improving predictability through administrative review, size of staff, and properly using expedited review.

Technology: Digitize the code and create an electronic review process to make review more expedient. There are additional advantages, as an online platform reveals when and by whom plans are submitted and reviewed, clearing confusion for whose responsibility it is for the next step (e.g. applicant or staff review).

>   **Noted case study- Calgary, BC, Canada**. Desk review staff have oversize monitors for plan/plat viewing and field review staff have tablets.

Administrative Process: Development Review with long timelines oftentimes results in a product that no one in the community is happy to have; the longer time increases the cost-of-business, lessening affordability. Developers may offset this cost increase by not funding payroll or materials for better design. The long timeline is influenced by multiple levels of legislative approval (multiple boards, City Council) and the City of Austin should work with stakeholders to codify the criteria which review boards approve so these decisions may happen administratively, and boards/commissions can focus on legislative activities. Public Hearing Officers are also used in cities to render decisions on non-controversial cases

>   **Noted case study – Los Angeles, CA** Public Hearing Officials help to conduct the public hearing in order to render a decision and ensure that it is not influenced by outside issues or individuals.

Right-size staffing: Too many staff leads to inefficient reviewing as one staff member does not have jurisdiction to answer questions which may be in a co-worker's domain. Additionally colleagues' asks may begin to come in conflict with one another, providing the impression that review is done in silos.

>   **Noted case study – Denver, CO** was over-staffed. Department found opportunities to promote staff by giving them more responsibility, as private sector is required to know both zoning and code content therefore public sector employees can be charged with this information as well.

Expedited review: If there is a way to perform expedited review, this means that all customers prospectively should be able to have access to more efficient review. Expedited review teams should be

viewed as pilot projects for transforming the overall process, though City management needs to be aware of the personnel issues that may arise from some staff being viewed as more powerful than others.

Noted case study – Dallas, TX has a Q-Team which charges $1,000 per hour for interdepartmental staff to sit at the table. This team is hired separate of other staff, so there availability does not impede on other applicants' ability to access staff.

The recommendations listed are not comprehensive to those which the panelists put forth, and do not reflect the viewpoints of the City of Austin. These recommendations will be shared with the Opticos Consulting Team and City of Austin CodeNEXT staff to leverage opportunities for an improved process while revising the City of Austin's Land Development Code.

Questions Presented at the *Best Practices in Development Review* Panel

Who Decides what? There is administrative decision making, planning commissioners and City Council who are asked to weigh in, where is the best level of decision making?

(White & Park) Make as many decisions administrative as possible; the staff are professionals and the more decisions that can be made administratively allows boards and commissions to fulfill a legislative process and will reduce the time it will take for development.

(Park) If you care about affordability and design, decisions should be made administratively. The length of time to seek approval of boards, commissions and Council adds to the cost of development. To keep a project's costs down, design may be compromised, leading to a lower quality development.

(Holmes) Enabling administrative decision-making requires strong management support for Staff to know that their ability to take risks are supported and will not result in an adverse response if their decisions are made with found judgment.

(Zucker) Push everything as far down in the process as possible. Professional Hearing Officers have been used in Oregon and Washington; they are specially trained and their coordination assists to meet shorter timelines.

(White) When the cost of development goes up, quality design and affordability go down. A longer timeline adds to the cost of development, and steps should be taken to reduce this timeline for greater community benefit with development.

How are appeals best addressed?

(Park) Identification of the nature of the appeal should be the floor for identifying changes to the appeal process– if many appealed projects are approved, we should look at the conditions of these developments and codify these.

(White) A State's Zoning Enabling Act (SZEA) identifies who has the right to review the appeal: a board of zoning adjustment or a professional hearing officer are the players, and the city should look to its charter on who is able to be involved. Leveling the field so you do not have to

Moderator Larry Schooler presents a question to panelists for insight. L to R: Mark White, Peter Park, LaShondra Holmes, Paul Zucker and Larry

go past Planning Commission or City Council lessens the legislative influence on administrative decision-making.

What are best practices for stakeholders to know about proposals?

(Holmes) SZEA- Requires certain replats, zonings, and Special Use Permits to be notified; In Dallas Development Plans (PUDs) trigger notification by mail within 300' and if there's sufficient friction then the City schedules the project for Planning Commission.

(White) All permits and processes shouldn't be treated equally. We as a community need to decide on standards; if a building permit or certificate of Zoning Compliance complies with the community's agreed upon standards, a formal notification shouldn't be necessary, only discretionary projects should get notice. State law mandates mail and formal notification for certain types of applications, a City should look at more ways for technology to be incorporated to give notice (e.g. email), but, need not codify this. Many modern codes have tables identifying who makes the decision, is there notice, how is notice given, etc.

(Zucker) Community should decide *who* gets notice-not the experts; use internet and social media; forget the newspaper and typical state statute of fifteen days—give your community early notice. This shortens the process for the developer, a benefit for all since the quality of a project goes down as the timeline goes up.

Time is money. The quality of projects will go down as your timeline goes up. How to incorporate this?

1. Early notice-the day an application comes to the office notify; Dallas provides early notification to resident groups that are registered within 1,000'.

2. Developer meets with residents in the development area before an application submitted; League City (TX) does this, and developer has to submit log of citizens attending meeting and notarized letter affirming the meeting was held with application. Zucker recommends that developers, city, and citizens work together, and advises that city staff attends the pre-application meeting.

What emerging technologies benefit the approval process?

(Zucker) Electronic plans and payment by credit card should be submitted over the internet. National chains are beginning to opt-out of working in communities that don't have electronic plan check systems. This saves time and makes it easier for others to participate. Calgary, Alberta (Canada) is going entirely paperless, in doing so has provided 40" computer screens for all reviewers. Additionally code should be simplified and accessible for an applicant to see just the sections of code applicable to the project.

(Park) The updating of maps through GIS while updating the Code will allow for greater efficiency. Electronic permitting systems also keep people honest as to who is required to submit "what" "when"-developer or reviewer.

(White) Having a one-stop shop and electronic permitting system allows all departments, planners, engineers, and public have access to the same information.

What are your thoughts on offering expedited review?

(Holmes) Dallas has Q-Team Review, available for $1,000 per hour, with certain interdepartmental staff which is only assigned to expedited review, and is hired independent of the existing review staff.

(Zucker) The more screwed up your processes are, the more it calls for expedited process. Expedited process may allow the rich to move ahead and others to fall back. City of Los Angeles put together an expedited process which requires payment of Normal Subdivision fee, fee for all who touch the application (making the cost 2-3 times greater), and subdivision moves forward in 45 days. 60 new positions were authorized to be released by the City Manager when the development came in asking for expedited review. Now every subdivision coming in is expedited, as it knocks 2-3 months off of the process.

(Park) If creating a system of expedited review, you must make sure that all others do not get delayed, that is not good government. As a City, morale can become a challenge as those on the expedited team see themselves as an elite team. Expedited review means that faster review is possible, and a City should look to an expedited process as a pilot to improving its overall process for a higher level of service for the whole organization.

The development permitting process is painful and medieval! Please help! As the community goes through the process to improve the Development Review System, how should we identify areas for improvement?

(White) Interview the power-users: homebuilders, developers (suburban, urban and downtown), subdividers, and neighborhood activists. They have the most familiarity with what does/doesn't work. The public needs to understand the changes that are being made-be mindful to communicate these.

(Zucker) Is the department properly staffed to carry-out these functions? If you're understaffed, forget about all ideas mentioned and staff properly. Zucker identifies that most communities are full-cost recovery and have a reserve account for when development slows. Metrics to calibrate the level-of-staffing include timeframe for building/engineering; it is more difficult to determine staffing capacity for planning employees.

(Park) How the staff is organized has a lot to do with what's in the code. In Milwaukee a high-rise building's zoning and building code reviewer is one person—this demanded at least seven people in Denver. Consider trusting in the private side-who are licensed professionals and their livelihood rests on doing good work-to ensure that consultants don't get a free red-line service from the City. An architect must know zoning and building codes, can't government have one person review multiple parts of the code? Denver did this, combining staff roles leads to promotional opportunities, increased capacity of the City; Denver had to send certain review to L.A. when some review was being complete, and other fell behind. Increased capacity ensures more gets accomplished.

How do you rationalize the different roles which staff play? How do you get them to look beyond individual areas and make consistent decisions across multiple departments?

(Holmes) Identify what you are trying to provide to your citizens and your customers. Staff has a Building Officials' Determination Guide as a cheat sheet for different regulations, created from a 1,000-page binder of interpretations, making it easier for staff to be consistent.

(White) Code must be well organized and create clear lines of authority for staff and commissions who makes decisions and how they make the decision. In a separate section (such as an appendix) detail what information needs to be summited, whether a decision is made administratively or legislatively, what the next step is (board review, start construction, go for a permit), and how to keep track of the process. This allows staff and customers to know how to go through the process.

Have you seen process maps online depicting the process?

(White) We use a program called SmartDraw that does flowcharting. It enables a visually understandable way to communicate for power and casual users.

(Park) Whether the picture is understandable may not be a feature of the software, it may be tied to the process. It is a challenge to diagram the work that is done, but, we must do so to understand it. We should bring the staff that do the work together in one place.

(Park) The code is like your software, and the people and organization are like your hardware. We can upgrade the software, but, there is a commensurate level of performance if you try to update one without the other.

How does the City potentially catalyze diversity from a diverse group of stakeholders?

(White) Certain communities need different points of outreach. You may need to contact churches, social services and go to them; they're not going to come to you.

(Zucker) We went to them [low-income Indian community] door-to-door. We can't do this in this forum.

Should a city enforce deed restrictions?

(Unanimous): No.

The City has a complicated Code that even staff cannot make decisions, how does a Builder move forward?

[Question not fully answered, though Holmes affirms that Austin is not the only city where complicated regulations exist] (Holmes) Speaking from Dallas' 17 Conservation Districts (now growing to 20), different interpretations have had to go to the Board of Adjustments twice.

Austin has different neighborhood plans which vary area-to-area. How can these be codified going forward?

(White) California's Specific Plan includes plans and standards which is tenement to 30 different development codes. Plans should be plans, codes should be codes. Do not write plans as codes. The standards development is held to should be written in development codes, not neighborhood plans.

(Park) Folks involved in neighborhood plans are very invested in the area and the plan; zoning usually creates new zone districts or overlays, yet, the best practice is that we need a broader menu in zoning code. This means that neighborhoods can choose from the menu to accomplish goals in main street, neighborhood and commercial areas in the neighborhood. Carry forward the things that make sense and line up with the plan.
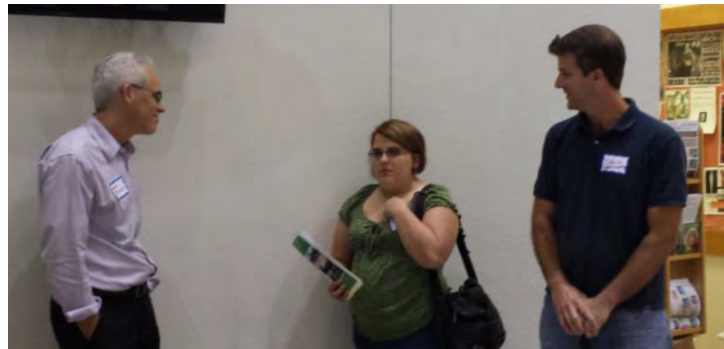
Community members Jennifer Bennet-Remuth (center) and David Whitworth (right) speak to Austin City Council Member Chris Riley (left) after the panel.

Small Group Breakout Sessions

Panelists teamed up with LDC Advisory Group Members to host breakout sessions with the audience, allowing more opportunities for targeted questions and shared learning.

Breakout Session Title	Panelist	Code Advisory Group Member
Challenges and Other Cities' Processes	LaShondra Holmes Stringfellow	Dave Sullivan
How to Implement Changes	Peter Park	Mandy De Mayo
Law & the Land Development Code	Mark White	Chris Bradford
What are the Goals of a new Code?	Paul Zucker	Melissa Neslund

Community members met with **LaShondra Holmes Stringfellow** to discuss opportunities for housing affordability and engaging the community, in addition to clarifying what zoning can do versus the market.

In Dallas a zoning overlay district exists to advance affordable housing. This overlay reduces parking maximums if the housing is located within a certain distance to public transportation, as affordability needs to be assessed by both housing and transportation costs.[2,3] The City is still awaiting its application by a developer.

LaShondra Holmes listens to attendees' questions on community involvement.

LaShondra cited Fort Worth's former staffing model as a best practice to increase community engagement. Prior the recession, Fort Worth assigned one Planner to each of 5 sections. There the Planner was able to serve as a liaison to that community, building trust between members and the city.

Confusion exists as to what a city is able to do for service allocation and distribution. In Dallas it is not a zoning issue, but, a market issue, for the promotion of services such as grocery stores,

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[2] H + T Affordability Index. Center for Neighborhood Technology. http://htaindex.cnt.org/

[3] Housing and Transportation Affordability Initiative. U.S. Department of Housing and Urban Development. http://portal.hud.gov/hudportal/HUD?src=/program_offices/sustainable_housing_communities/housing_transaffinitiative

doctors' offices, etc., to be in markets that lack access to these businesses. Communities can encourage the dispersion of neighborhood-serving retail and professional services through mixed-use zoning, however, it is a restriction of property rights to only allow specific businesses to operate on a given parcel.

Peter Park's experience as the former Planning Director of Milwaukee, WI, and Denver, CO, brought a large audience together to ask questions on staff retention, discuss ineffective

Peter Park's 16 years as a Planning Director brings invaluable information.

overlays, and opportunities for better regulations.

Audience members mentioned that Development Review Staff experience many burdens:

o Some review staff's background is in Planning, thus they are not familiar with the development or building process.

o Staff need to be animated for the position; some are beat down, under empowered (specialize in one part of the code), and in survival mode. The Staff inherit the Code and did not create it, causing a lack of ownership for the process. The ones who are creative stay in the position for a short time period.

o Staff in the field often trump the decisions made by planners in the office; when staff disagree, the weight is on the developer to solve the issue, rather than staff working together to find a solution.

o When in doubt, staff have strong incentive to say "no" because if they're wrong, they only delay approval. But if they say "yes" and they're wrong, they are reprimanded for the mistake. There are consequences to saying "no"; delays increase costs which can be passed on to buyers & also clog up the process (e.g., Board of Adjustments).

Development in Austin is not what the community has hoped to see, and was deemed a "brutal" process for developers, review staff, and neighborhood representatives alike.

- o The Code presently is a one-size-fits-all approach which creates insensitivity to existing patterns. The City Council's response has often been to create overlay districts, which may improve the situation for that district, but can push the problem in other parts of the city.

- o More "flavors" and variety can be added to the zoning menu to create desired patterns, but, these need to be easy to understand so that all interpret the code equally. Additionally, community members expressed that the code should be understandable by neighborhood activists, as was the case for Denver, CO, where an individual knew the code better than a lawyer who was trying to shoot the code language down.

Additional feedback was received recommending that buy-in happen across all levels—in order for the code to be effective and successful internal city staff (with a focus on those who do review) and external community members (developers and activists) must buy into regulations.

Technology presents an opportunity for efficiency; where "simple permits" exist, incorporate automatic electronic/online approval. The development community can also facilitate faster review, if the City implements licensing for general contractors (as San Marcos requires) new individuals will be able to develop according to the code, and the City can create a communication channel with those licensed to receive updates on the LDC.

A small group gathered to discuss legislative and coding issues with **Mark White** of White & Smith, Planning + Law, LLC. The conversation looked at the roles of development processes and bodies to make a more efficient and by-right code.

Planned Unit Developments (PUDs) incorporate compatible land uses (such as residential, commercial and industrial) in one development and have been used extensively in Austin. In response to an idea to have PUD approval dependent on a public architect's review so that the PUD contributes positively to surrounding development, Mark White stated that PUDs should not be used for 90% of developments. Their wide application signifies a deficiency in the Code as the PUD process is costly and time-consuming. To lessen the legislative process

CAG Member Chris Bradford speaks to Panelist Mark White in the breakout session as City staff and community members listen.

that comes with PUDs, developers can follow a modular PUD approach which allows for by-right options with varying lot size, density, setbacks, etc.

Austin's fifty plus commissions offer much to development review though it is undisputable that they slow the development review process, as visits to legislative bodies such as the Historic Landmark Commission and Environmental Board occur prior approval with the Planning Commission. Commissions may still be involved, though White recommended to re-scope their missions so that they are no longer involved in the permitting process. A Downtown Design Board worked with White to codify design standards so that the commission's role would change. Mark White was incredulous to the attendees' input that City Council Members wanted to hear appealed cases.

Paul Zucker, Principal of Zucker Systems a consultant company which has worked in hundreds of municipalities, counties, and states in the United States and Canada, brought a wealth of information regarding staff structuring for review, assessing the performance of a code, and overall accessibility.

In Calgary, Alberta, staff is part of project-oriented teams where they have the ability to make decisions and collaborate with specialists (engineers, historic preservation officers, etc.). Zucker is suspicious that Austin is understaffed and its organizational function is too large.

Attendees mentioned that information which staff supplies does not always have accuracy and consistency. Zucker suggested that weekly meetings and training begin for staff; building inspectors generally have this, but, planning staff may not. If this inconsistency is due to multiple review processes, ensure that these are corralled and that there are appropriate levels of staff.

The number of staff puts a significant strain on the permitting process and timeframes. Several ideas were addressed:

- o Review staff should be funded by application and permit fees. In times of lower development, a reserve should be established to keep staff employed.

- o Establish review timelines which are considered acceptable. When timelines derail consider using blended staff and use consultants to meet peak demands.

- o Developers should be best advocates to ensure that funding reserves do not get pulled into the general fund during shortfalls.

Attendees vocalized need for staff empowerment; decisions should be made at lowest level on the totem pole and be able to make decisions and modifications to regulations based on context.

A new code needs to be reviewed for its effect on development and application.

Zucker recommended to measure consistency and adherence to review turnaround/timelines. Performance measures for outcomes of development (e.g. quality of life) are more subjective. Some ordinances are easier to measure the outcomes than others (e.g. success of Capitol view corridor). When writing the new code, document what type of development the community wants, but, enable flexibility in the code to allow for context sensitive application.

A crowd gathers for Paul Zucker, gleaning insight on how other cities have adopted management strategies.

In many cases Zucker has worked with "trouble cities"; for cities which are successful like Austin, a 5-year follow-up performance review can be successful to accomplishing goals. San Jose, CA, has attempted to use the follow-up review technique by administering a survey.

Best Practice Reports

Panelists of the *Best Practices in Development Review: Smoother! Faster! Smarter!* were asked to share their lessons learned with the Land Development Code Consultant Team. The following reflect the ideas of the panelists and are not expressive of the City of Austin's view.

City of Austin – Streamlining Development Review

Based upon my experiences with planning and building departments at Texas municipalities, the following is a list of best practices that could benefit the City of Austin as it explores streamlining the development review process.

- *LaShondra Holmes Stringfellow, AICP*
  Planning Manager, City of Dallas

10 – Invest in technology
Invest in a digital plan review system where applicants can submit applications and plans, pay fees and check permit status all online. The system can be funded with a technology fee even prior to use of the system. Digital plan review will eliminate lost plans, enable concurrent multi-departmental review, and reduce physical space needed to store plans.

9 – Provide premium services
Due to the high volume of applications in large cities, it's difficult to simultaneously gather multiple departments responsible for review in the same meeting. Create an Expedite Team that consists of staffing from all these departments whose job responsibilities are only to this team. The City of Dallas charges $1,000 per hour for this service. It was so popular that a second team had to be added with a third team pending the addition of more office space.

8 – Offer in-house consultants
Assemble a team of experienced City Staff whose primary function is to assist customers through the permit process from application to certificate of occupancy. This service should be an additional charge on top of regular permit fees. The City of Dallas charges after 20 minutes. It will be beneficial in relieving the plan review staff and their supervisors from conflict resolution and unexpected project management duties.

7 – Establish predictable timelines
Establish maximum time from application submittal to the time the applicant receives staff feedback. Use stakeholder committee to establish acceptable levels based upon current staffing levels and future staffing levels. Be prepared to require overtime and compensatory time to employees when applications exceed anticipated numbers.

6 – Maximize personnel and existing technology
Ensure clerical duties are being performed by clerical staff as opposed to professional staff. Any duties that can be performed by a machine should be. Utilize a call center that can answer basic questions via phone and e-mail. All staff should have a prompt on their phones and e-mails where customers can conveniently defer to this center for immediate assistance.

5 – Regulate as opposed to recreate
Place more accountability on the licensed professionals and tradesmen by relying more heavily on their sealed plans. City Staff should not spend copious amounts of time recreating the work of the hired professionals. City Staff should review for basic protection of health, safety and welfare. This will reduce City Staff's review time and potential liability. Additionally, it will enable less complicated plans to be reviewed over-the-counter while applicants wait.

4 – Frequent flyers are not just for the airlines
Incentivize frequent customers with benefits such as shorter review times. These customers should know the requirements and therefore have the ability to get through the process more quickly. It may buy the department time while implementing time-consuming and expensive measures. The City of Dallas has a "Gold Card Program" for residential builders.

3 – Form Stakeholder Committee
Establish a group of frequent customers, City Staff and other stakeholders to strategize on solutions. It is important that this committee consists of individuals who are innovative problem-solvers as opposed to disgruntled complainants.

2 – Train early and often
Regulations and interpretations often change. Require at least monthly training sessions for staff on codes and processes. Sessions may be rotated by experienced staff.

1 – Rally Staff
A process may be sound in theory, but ineffective in practice if the personnel is not properly trained or is apathetic about new procedures. To counter this, assign leadership roles to key staff throughout all levels of the organization in the decision making and implementation process. They will have a vested interest in its success and will garner buy-in with the rest of the City Staff.

High

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Low

Top Ten Practices for Improving the Development Review Process
By Peter Park

1. Prioritize "By-right review" and organize the Land Development Code (LDC) around this discipline.

2. Standardize procedures that link plan preparation processes (citywide and small area) with LDC language and map amendments so that the planning visions are clearly and effectively implemented.

3. Avoid reliance on plan-specific standards. Prepare area specific standards only where warranted owing to truly unique form and character. The LDC should be sufficiently broad (vs "one-size-fits-all") to capture the variety of desired contexts and character of Austin's neighborhoods built in different eras.

4. Involve plan review/permitting, inspection, and legal staff in the creation of all code amendments so that staff who use the Code on a daily basis (and/or need to defend in court) fully understand it; can confidently, accurately, and consistently interpret it; and have a strong sense of ownership and commitment to its implementation.

5. Institute a multi-department working group that meets regularly (weekly) to oversee creation of new Code and continue to meet regularly especially in the first year of the Code implementation.

6. Consolidate procedures and develop as much consistency (notification channels, timeframes, etc.) across similar types of reviews/issues. Eliminate redundant procedures.

7. Operate with the expectation that all permits are issued as expeditiously as possible and avoid creating a special "expedited permit process." However, if one is created, ensure the following:

   a. Call it "Expedited Permits" and not "Expedited Review."

   b. Expedited permits do not cause other projects to be skipped over, "go to the back of the line," or delayed in any way.

   c. Charge additional fees for the privilege of expedited permits and use the revenue to support additional staff capacity to deliver but don't become dependent on the revenue stream for basic service delivery.

   d. Do not create an "elite class" of reviewers. All plan review staff should be part of the "expedited permit" system to learn and be part of evolving improved practices. Deploy

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Building Compact & Connected Speaker Series 2013-2014
October 15-16, 2013 Session - *Best Practices in Development Review: Faster! Smoother! Smarter!*

lessons learned/improved practices developed in the expedited system to regular reviews.

    e.   Consider offering the expedited permit process for a limited time with the intent to phase it out as improvements in standard practice eventually make a separate "expedited" process obsolete.

8.   Evaluate planning, development permitting, and inspection processes concurrent with the LDC re-write. Maximize opportunities to consolidate and streamline reviews and the organizational structure as a function of a simpler and more coordinated LDC.

9.   Evaluate the physical organization, functional relationships and proximities, and spatial adequacy for the permitting functions. Create a centralized place and work environment that conveys a sense of transparency, access, efficiency, and coordination to both customers and staff.

10. Maximize opportunities for customers to obtain and pay for simple permits online.

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Things to Consider

To aid in evaluation and help identify streamlining opportunities, the following assessment criteria should be considered in measuring the effectiveness permit reform:

- **Plan Implementation –** do your procedures encourage development patterns and practices that implement your planning policies? Or, do they invite negotiations, exceptions, or other vehicles that compromise your planning policies?

- **Predictability in the Process –** does the development review process have standards or guidelines to enable agency reviewers and decision-makers to evaluate the application? Are the review steps in a logical sequence that leads to an informed decision?

- **Scalability in the Process –** does the development review process allow for varying levels of review which are proportionate to the decision's effect on the public? Depending on the type and magnitude of the development project, not every standard or review step has the same level of importance. The regulations should recognize there are differences between development applications for a small addition to an existing building and that of a large new building on an undisturbed piece of ground. A scalable process also allows the application of standards to vary by their purpose or over time, where needed. With some issues such as life/safety there can be little to no compromise and every project needs to meet the expected standards. However, in other cases, best practices may change over time. For example, renovations or additions to previously constructed buildings may not be able to physically or financially meet today's standards. Variable standards that are well documented, logically justified and publicly vetted can provide significant time savings, especially to individual homeowners and small businesses.

- **Equitable Treatment to the Applicant and the Public –** does the development review process allow the applicant and the public an opportunity to learn about the application, and the agency's evaluation of a proposal? Does the public, understand the potential implications of the proposal and the review, and have a sufficient, yet defined, amount of time to express an opinion? Typically, if the development review process is not open and easily reviewable by the public, opponents to development will rally to have the local government slow down and delay the development review process to ensure an opportunity for public scrutiny. There is a critical balance between streamlining the development process and providing the public an adequate opportunity to review and comment on a development that will affect their quality of life. Therefore, one streamlining strategy is increasing public participation early in the development review process when the changes are easier to make and cost less.

- **Certainty in Decision-Making –** does the development review approval process have a clearly defined approval authority, and efficient appeal process? When the process has more than one potential approving authority, the applicant and the public become uncertain as to whom their comments should be directed toward. Not only does it add to the cost by potentially rehearing

a developer's application twice, but, the possibility of inconsistent and conflicting testimony presented at the two different hearings clouds the understanding of what the final development will achieve. It also undermines the authority and confidence of the subordinate approving authority, not knowing if their decision will be reconsidered.

- **Flexibility** – balancing flexibility and certainty is a major challenge. Are exceptions left to the variance process (which requires hardship, as opposed to improved quality) or discretionary review? Is there a process for minor exceptions? Alternative standards?

- **Consistency** – do the regulations have multiple interpretations or exceptions in how to they are applied? Is there a streamlined set of standards that apply the same process for everyone, and does not include unnecessary exceptions? It should be noted that scalable requirements provide variable ways to satisfy a specific requirement, but do not exempt select groups from the process. Streamlining techniques can minimize exemptions and establish uniform evaluation procedures for a particular issue. These standards may differ, however, depending upon community concerns and interests.

- **Efficiently Implements the Plan** – does the development review process distinguish between different parts of the City? Is the approval process for subdivisions on greenfield sites shorter or more predictable than the new development in infill locations, or redevelopment?

Application Steps

Does your process include –

- Pre-application?
- Neighborhood outreach?
- Completeness review?
- A common workflow?
- A clear decision making process?
- Clear lines of authority?
- Written determinations?
- Best practices in technology?
- Clear criteria?

Texas Issues

Beware of the following issues in Texas –

- Spot zoning (v. mixed use development)
- Legislative v. administrative decisions
- Subdivision "deemed approval"
- **Vesting!**
- Variances v. modifications

Development Review

Best Practices

By

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A. INTRODUCTION

Background

Zucker Systems specializes in the governmental development and permitting process and has completed work for some 170 cities and counties in 31 States, two Canadian Providences, Barbados, the Cayman Islands and Washington D.C.

Approach

Zucker Systems has developed what it considers "Best Practices" for governmental development and permitting processes. This list continues to grow and change but currently includes the 51 items shown in Appendix A. This is an overview list and specific functions include additional best practices. While conducting our studies we use the summary list as a starting point, each item may not be appropriate for a specific city or may need to be modified to fit a local situation.

Development process organizational studies often focus on the planning function. However, this is too narrow a focus, which does not take into consideration the full scope of the development, permitting and community building process. Further, this type of narrow focus generally does not satisfy the customer's desire to understand all of the related development processes. Normally at least 10 or more city functions are involved in providing development and permitting services. As such, solutions for the development process must address all of them.

B. FOCUS, HISTORY AND IMPLEMENTATION

Organizational improvement is a continuous process. Progressive organizations revisit these types of review every five years.

In order to be successful in its development improvement process endeavor, City leaders need to make **an absolute and long-term commitment on a few key Best Practices;** this is my first, and perhaps most important, suggestion. The entire process needs to be periodically reviewed.

We experienced this first hand in a recent study for Columbus, Ohio. The Mayor had become so frustrated with the development and permitting processes that he decided to create a new department and hired Zucker Systems to complete that task. As we got underway we discovered numerous Columbus documents designed to improve the development process. What we considered to be key success priority issues suggested in these studies had not been implemented. We temporarily stopped work and took these issues to the Mayor. We suggested that unless he was willing to proceed with these key issues, it was useless to continue the work. He agreed to implement these

issues and the new department was created and is operating today. While Columbus isn't perfect, implementing the key priority issue items has set the stage for continuous improvement.

C. THE INFORMATION AGE

It is likely that some new employees that are hired by government have already used technology that may be more advanced than the government's technology. Not only are employees demanding contemporary technology, but so are citizens, developers and applicants.

Social Media

Social Media technology, such as Face Book, Twitter, LinkedIn, i-Phones, i-Pads and other Personal Digital Assistants (PDA's) is one aspect of this new contemporary technology that most employees, citizens and developers have experience using. Moreover, new social media technologies are being developed and introduced every day. **Government needs to be ahead of the curve with social media technology.** Although, this is not my field of expertise, there are numerous national efforts and experiments underway by varies agencies that are using social media as a cornerstone for their technological systems. Government can learn from these agencies.

Permitting and Development

Virtually all architectural, engineering, and survey drawings and documents are already in electronic format. Yet most communities continue to see trees cut down to create the tons of paper that is required to be circulated and stored in the development and permitting process. Technology has now progressed to a point where all of these types of drawings can be handled electronically and at an affordable price. This is the so called "paperless office."

We have recently conducted national research to see how efforts towards the "paperless office" are progressing in the United States. Our research indicates that while the progress is not as great as we had assumed, it is accelerating on a daily basis. As recently as last month, the first software application was released to process building permit inspections using the i-Phone technology. National developers are starting to say they do not want to work in a community unless it has electronic plan submittal and plan check. These systems not only assist the applicants in various ways, they also provide the framework for integrating the numerous governmental review specialists and can also provide one more means of access by the broader community. In order to advance national and local sustainability objectives, improve coordination and efficiency, and position itself competitively for future economic development growth, **governments should move aggressively toward the**

"paperless office" for development review and permitting. I predict the electronic permitting process will become the norm in most communities over the next five years.

Moving into this paperless environment requires hard work, time, money, and lots and lots of training. We recently worked with Calgary, Alberta which is underway on a three year, twelve million dollar program to go paperless for the development and permitting processes. Recognizing the scale of the change, they have several full time staff that dedicated to manage this change. They are not technology experts. They are change agents.

This electronic age, as related to development and permitting, includes these features:

1. **Central Permitting System**

   These systems were originally just tracking systems and often started in the building permit function. The problem with tracking type systems is that it requires information to be continually input and up-dated. What is needed instead is a more contemporary processing system, which actually requires you to use the system to conduct business. Then the tracking and reports are simply by-products. It is important that the system be used by **all** departments and divisions that are involved in the development and permitting functions. Otherwise it can't achieve its full potential.

   The system must have easy ties to the GIS system, field computers, automated noticing and letters, weekly monitoring reports, and ties to electronic files. The ability for the system to interface with Internet permits and electronic plan check software is also critical.

2. **Field Equipment**

   All field inspectors, (building, engineers, code enforcement, and planners) should have **wireless field computers tied to the Central Processing System**. These are often Tough Books but new applications are also coming out for the i-Phone and i-Pad. **The system should include GPS and access to electronic files. For some of the inspectors, particularly building, small field printers should also be used.**

   All inspectors should be equipped with cell phones so that they can communicate with the central office and the customers to alert them to inspection times. Some agencies and staff resist this but we are in the information age and communication expectations are increasing.

3. **Internet Plan Submission**

Electronic plans and applications should be received over the Internet and fees should be paid by credit card. It is counter-productive to receive plans over the Internet if the community is not equipped to undertake electronic plan check.

4. **Electronic Plan Check**

   Electronic plan check is essential. This not only facilitates communication with applicants but also allows simultaneous review by a variety of reviewing functions. In addition to the appropriate software, **it is necessary to have large viewing screens.** Some agencies use 40 inch viewing screens, while others use a combination of 20 and 30 inch viewing screens. The transition from paper to electronic plan review **will require substantial staff training and will need to be phased in over several years.**

D. MONEY AND STAFF

Developers are concerned with two major issues: 1) the time it takes to process an application; and 2) consistency and clarity of the reviews. Time is of such great importance that they are willing to pay extra fees in order to reduce timelines.

A few years ago, during the development boom, virtually all of our clients had the same problem. They had poor service levels because they did not have an adequate number of staff to process the workload and elected officials would not authorize enough dollars to keep up with the demand. Today, service levels of our clients are often still poor, but for a different reason. The overall city revenues and budgets are down, so the solution is to reduce staff through layoffs. These layoffs tend to take place across all functions including the planning and development office and staff is cut to a level where good service is no longer possible. The layoffs may occur even if the planning and development functions have revenues that exceed costs. These excess revenues simply are transferred to the General Fund. In some States this transfer is not legal, but it is done anyway. **The progressive development and permitting programs operate as full cost recovery systems and fees are established high enough to make this possible.** While this normally works well in times of high development activity, it can be a problem during times of low activity. There are two good ways to handle this issue. The first is to have a substantial reserve account which can be used in times of low activity. **We recommend that a reserve for development activities be equivalent to 9 or 12 months of the normal budget**. **The second approach is to use what we call a blended staff. A base staff is supplemented by stand-by, or on-call consultants.** As development activity picks up, additional consultants are used. As development decreases, consultants are no longer needed. This avoids the layoffs traditionally used to solve the problem.

This system works well for the permitting and development functions, however, many of the planning activities must still be funded by the General Fund. A few California communities have begun to address this issue through the use of an override fee on

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building permits. A certain percentage of each permit is allocated to an account for the city-wide plan. Another percentage of each permit may be used by sub-areas to fund community plans.

A good example of this system is in Calgary, Alberta. Most of the development and permitting functions are in one department with a staff of 600. The program is a full cost recovery system. The annual budget was $64 million with a reserve account of $30 million. We recommended that the reserve be increased to $60 million which has now been adopted as city policy.

Another example was the City of Los Angeles subdivision process. Timelines were becoming increasingly long. An expedited program was developed where the applicant not only paid the normal subdivision fee, but 100% of all the staff's time that worked on the subdivision. In exchange, the City substantially reduced the timelines. As revenues increased, the departments were authorized to add staff as necessary. Under this system, most subdivisions became expedited.

E. PERFORMANCE STANDARDS AND MEASUREMENT

Developers and applicants throughout North America are concerned about how long it takes to obtain approval for a project. Reviews have generally become more and more complicated resulting in longer and longer timelines. Some States as well as cities have attempted to solve this problem by setting performance standards or timelines from the time an application is accepted to the time it is either approved or denied. The problem is that the overall timeline is not under the control of the city. The city cannot control the amount of time the applicant may need to make changes that the city requires for the development.

The way to solve this is to set and monitor performance standards for the sub-processes that are under control of the city. Many projects go through more than one cycle of review. A timeline should be set and measured for the first cycle. A second timeline should be set and measured for the second cycle, etc. The timeline performance standard should be cut in half for each cycle. For example, if the first cycle is 20 working days, the second cycle is 10 working days, and the third cycle is set at 5 working days. The Central Permitting System discussed in Section C automatically keeps track of all of these times and can provide weekly reports to the managers to manage the projects.

Many systems report on the average time it takes to complete a process. For example, if the target is 20 working days, the average time might be reported as 18.5 days. However, this is not a useful measurement and **averages should not be used. The better way is to calculate what percent of the projects met the 20 working day Target. Further a good approach is to meet the target 90% of the time.**

F. ORGANIZATION AND DECISIONS

Collocation

Applicants and citizens generally complain that they must go from office to office to process applications or obtain information. The first step in solving this problem is to collocate all the related functions in one building or at least as many functions as feasible. While the functions may need to be located on multiple floors of the same building, the ideal solution is to have all of the functions located on one floor to better facilitate communication and integration. Some suggest that with electronics and the paperless office, collocation will no longer be needed or useful. We differ with this position. Face to face communication between staff as well as staff to customers is an essential feature. **Collocation is simply the first step.**

Integration of Functions and Decision Making

After collocation, the second step is how to integrate the multiple functions, solve conflicts between functions, communicate and work with both applicants and citizens, and make decisions. Most projects follow one or more reviews in sequence including:

1. Planning and Zoning Reviews

These applications are either approved by staff or processed for action by a Planning Commission, Board of Adjustment, Historic Review Board or elected officials. Each application is generally assigned to a planner who in theory becomes the case planner and single point of contact. While this works in theory, it often fails in practice. In Appendix B, we list **tasks that should be accomplished by the case planner.** Finally, if ordinances and policies are properly written, many of the decisions generally made by a commission or board should be **delegated to staff or a hearings officer.**

2. Site Plans

Most communities require a site plan to be approved either as part of the building permit or as a separate process that precedes the building permit application. These reviews vary substantially from community to community, however, in virtually all cases, they involve many specialists, including planners, engineers, fire, parks and environmental personnel. In some communities they also include architectural and design reviews as well as the police department. If each reviewer feels that their position or requirements need to be satisfied 100% of the time they can, so to speak, trump everyone else's requirements, and the process bogs down and creates major problems for the applicant. **A clear decision process for site plans is required.**

3. Engineering Construction Drawings and Inspections

Often overlooked in developing a clear and efficient development process is the role that engineering construction drawings and inspections play. It is not unusual for engineering considerations to remain "subject to the approval of the city engineer," at the planning and zoning approval stage. Even with site plan approval, the approval of the site plan may be considered sufficient to issue the building permit, but with engineer still requiring additional permits related to roads and utilities. **Key engineering decisions should be made earlier in the process. Where detailed engineering calculations and reviews are needed, they should also follow and meet clear performance standards.**

4. Building Permits and Inspections

The building permit and inspection process in most communities is a straightforward process, at least if it does not include site plan review. Plan checkers are generally required to be certified and competent. Ideally, one or more of the plan reviewers should be a structural engineer. Lengthy timelines for review can be solved with the performance standard approaches outlined in Section E.

In addition to plan review there are several best practice features for inspection including:

- **All inspections should be complete the day following the request**. Inspection delays can be very costly for the applicant.

- For single-family houses and small tenant improvements, **combination inspectors should be used.** It is not only costly to have multiple specialty inspectors but can create considerable confusion for the applicants.

- **Inspectors should call ahead within 30 minutes of arrival to a job site and contractors should also be able to reach the inspector by cell phone and the inspector should also be able to contract the contractor by cell phone.**

Alternatives

A variety of techniques are being used or have been tried to address the organization and decision making issues as related to the development process. There are pros and cons to each technique and the technique must be tailored for each community.

One person should be in charge of each of the four reviews outlined above and in some cases the same person might be responsible for all four reviews. For a major

project (shopping center, hospital, high rise office or residential, major factory, etc.) **one staff person should be assigned as a project manager.** This is often a planner but need not be. It could be an engineer or someone with project management skills from another function. This person is seen as a single point of contact for both the applicant and citizens. He or she keeps the project on track and solves issues between departments, between the applicant and departments, and between the applicant and citizens.

Cities and counties have tried a variety of alternative processes and methods to manage the development process. There is no one model that has proven to work in all communities and each approach needs to reflect local conditions. Seven of the models are described below.

1. Informal - Multiple Departments

This alternative is used by many cities and counties and tends not to work very well. A variety of independent departments are involved in the development process. Although planning, building and engineering are key functions, it is not unusual that there are four to six additional functions and sometimes even more. These often include Public Works, Fire, Health, Parks, and Police. Although planning tends to coordinate the entitlement process (zoning and subdivisions), building coordinates the building permit process, and engineers coordinate the engineering process, there is little control and timelines are generally too long. None of the specific functions actually take responsibility for any of the related reviews.

2. Development Review Committees

As an adjunct to #1, many communities have formed a development review committee that includes all the related functions. The Committee meets weekly or as needed to review major projects. Often this process has a number of problems including:

- Members come to the meeting unprepared
- Some functions come late or simply miss the meeting
- Those in attendance don't have decision authority. The common phrase is, "I will have to get back to you on that," particularly the engineers.
- The applicant is not allowed to attend so there is little direct feedback or problem solving taking place, however some communities do allow the applicant to attend.

The development review committee generally focuses on major items that will likely be sent on to a planning commission. The planner generally handles the staff report and then simply includes the suggestions or

conditions from the other reviewers. Sometimes there is an attempt to reach agreement on the recommendations and conditions; however, often the suggestions and/or conditions are simply collated by the planner. If the planner differs with one of the reviewers, they may simply ignore the suggestion or condition or comment on the difference in the staff report. If a reviewer feels strongly enough about the difference, they sometimes go to the planning commission meeting to represent their point of view. However, rather than resolving the concerns, they are sometimes simply delayed with a condition that says, "subject to approval by..."

3. Collocation With Some Integration

As an evolution of Collocation, some communities develop a joint counter and application intake function. They also set more rigid timeline performance standards and often have a system for the intake function or some other staff to monitor the timelines. While this can help with the timelines, the system still lacks a decision feature, which can be problematic.

4. Partial Merger With Collocation

Under this alternative the norm is to have planning and building in the same department, with the development portions of engineering collocated with the planning and building functions. Of the 50 largest U.S. Cities, only 38% have building and planning in the same department. Occasionally fire plan check and inspection is also collocated, as they should be, but this is often difficult to accomplish. This option would include the features of #3. It should be noted that just because functions are in the same department, it does not necessarily mean they are any better coordinated than when they are in separate departments.

5. Partial Merger With Collocation and Management and Decision Integration

This option is similar to #4 but takes it one step further. An example is the new Department of Building and Zoning Services we recently created for Columbus, Ohio. Planning and building are merged in this department. Relevant staff from engineering, transportation and utilities are collocated in this new department. Most importantly, for site plan reviews and engineering reviews, the collocated staff is under the daily supervision of a manager from the Department of Building and Zoning Services. This manager has the responsibility and authority to make decisions and move projects along. If any of the collocated staff have strong objections, there is an internal appeal process that goes back to their parent department. This has all been worked out through formal Memorandums of Understanding

between the Department of Building and Zoning Services and the collocated functions of engineering, transportation and utilities.

6. Almost Full Merger

This option includes all the planning, building and engineering functions in one department. Normally fire plan review and inspection is not included but they should be. The merger often includes the engineering functions but not the Public Works operational functions. Transportation planning is sometimes included but also often remains an independent function. The other issue is how to handle the engineering CIP function. Sometimes this is merged, sometimes it is not. Having CIP merged may be particularly important for a high growth community. Having all the functions in one department should help in coordination but that is not always the case. One method used is to have a Developer Coordinator position whose function is to resolve internal function conflicts, monitor timelines, and serve as a single point of contact for the larger projects. This function can also be given the task of the "care and feeding" of the development and permitting processes

7. Team Decisions

This is a unique system that is currently in use by Calgary. The planning, site planning, and design reviews are handled by four person teams consisting of Planning, Engineering, Transportation and Parks. These teams are only used for issues that cut across multiple departments. The team conducts the review and is authorized to make the decision. The Planner is the team coordinator. If specialists are needed beyond the four person team, they are coordinated by the specialist that relates to one of the team members. The specialist's reviews come back to the team, but the team has decision-making authority. There is an internal appeal structure should upper management or one of the specialist feel they cannot live with the team decision. Additionally, applicants may appeal to an external appointed group called the Subdivision Development Appeals Board.

Project Managers/Case Managers

Any major project such as a shopping center, school, hospital, or major industrial plant should assign a single-point of contact, such as a Project Manager or Case Manager, who works with the project from the beginning, all the way through to the Certificate of Occupancy. These Project Managers or Case Managers are often planners but can be selected from any of the functions. The key is to have high-level positions that have considerable experience and a personality or style that can work across systems. If the local community lacks such expertise or does not have someone who could devote adequate time, a private consultant can be hired for this task.

We have worked with many organizations that use a Project/Case Manager system and they virtually all experience problems. One problem is the case managers simply do not have the experience to integrate other functions. Often too low a level is appointed. The best system we have seen was in Scottsdale, Arizona. They selected five staff to be case managers. They were very experienced and a high level in the organization and the system worked well for a number of years. However, as staff turned over, newly appointed staff did not have the experience as those originally selected and the system began to experience similar issues seen in other case management situations.

Summary

Alternatives 5, 6, and 7 are all potentially workable alternatives since they include a heavy decision or coordination feature. They should all include the Project Manager/Case Managers system.

Appendix A

Best Practices List

1. Good plans, policies, handouts, checklists, design guidelines, construction standards, all up to date
2. Collocation of all development related functions
3. Manager or coordinator of collocated functions
4. Clear agreement as to who has decision authority
5. Adequate parking and public transportation
6. Attractive and functional waiting area and counter area
7. Counter wait times are set and monitored, 10, or 15 minutes depending on community
8. Highly qualified front counter staff with a problem solving perspective
9. Plans are checked for completeness at intake or in first few days
10. Only complete plans are accepted for processing
11. Electronic permitting system with good ties to GIS
12. Electronic applications and plan submittal via Internet
13. Credit cards are accepted both in the office and over the Internet
14. Easy to understand fees based on actual costs
15. Full cost recover and enterprise type fund
16. Reserve account equal to 9 or 12 months of normal department budget
17. Electronic plan check and electronic files
18. Through, fast and fair process
19. Use of stand-by consultants when performance standards can't be met
20. Issue small permits over the Internet and accept all plans over the Internet
21. Pre-application alternatives
22. Early notice to Stakeholders
23. Inter-department review committee with decision power
24. Project managers who handle "cradle to grave" process with decision power – from pre-application to C of O – Problem solvers
25. Performance standards for processing and plan check with weekly reports
26. Expedited review alternatives
27. Cut performance standards in half for each subsequent cycle of review
28. Meet performance standards 90% of the time
29. Track both government and applicant times
30. Comprehensive checks for the first review cycle
31. New requirements are not added in subsequent reviews, get it right the first time.
32. All reviewers to participate under a "if you snooze you lose" policy
33. Consultants for overflow plans when performance standards cannot be met
34. Three strikes and you are out or increased fees after three cycles of review
35. Comprehensive Email lists of all Stakeholders in the community

36. Good web site, handouts, forms, staff listings, phone numbers, email addresses, organization charts, all plans, policies and ordinances
37. On-line permit tracking
38. Electronic files at close out – records management
39. Interactive Voice Response and Internet inspection request systems
40. Next day inspections
41. Consultants when next day inspections cannot be met
42. Combination inspectors for residential and small TI's
43. Field computers, printers, and cell phones for inspectors
44. Developers advisory committee
45. Customer feedback and evaluation systems
46. Certified planners, engineers, plan checkers and inspectors
47. Stakeholder education sessions
48. Post construction field review of projects re quality issues
49. Work towards a paperless office
50. Use social media to communicate with the public
51. Periodically conduct a review of the process including customer input and support by the elected officials.

Appendix B

Case Manager Functions

A successful Planning Project Manager Development Review system entails having a Project Manager perform the following functions:

- Conducting pre-development meetings
- Reviewing applications at intake to confirm applications are complete
- Coordinating routing of plans to other reviewing agencies
- Collecting and integrating comments from other departments
- Challenging other department conditions when they appear inappropriate
- Resolving interdepartmental problems
- Solving problems not only for the applicant but also the broader public, building the city as a team
- Analyzing the project for compliance with regulations, policies and long-range plans
- Being an advocate for the process, i.e., maintains timelines and ensures they are met
- Coordinating with key decision-makers
- Coordinating input from regional, state or federal agencies
- Writing and signing staff reports
- Presenting formal presentation of the project at public meetings
- Signing off prior to issuing building permit and Certificate of Occupancy
- Field reviewing the project six months or a year after construction to determine if approvals were satisfactory or if unintended impacts have occurred.