CITY OF MADISON
ECONOMIC DEVELOPMENT COMMITTEE

DEVELOPMENT PROCESS IMPROVEMENT INITIATIVE

REPORT TO THE MAYOR & COMMON COUNCIL
JANUARY 31, 2011
AMENDED & APPROVED BY ECONOMIC DEVELOPMENT COMMITTEE ON FEBRUARY 16, 2011
FINAL AMENDED & APPROVED BY ECONOMIC DEVELOPMENT COMMITTEE ON MAY 11, 2011

City of Madison
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CITY OF MADISON ECONOMIC DEVELOPMENT COMMITTEE

MADISON MUNICIPAL BUILDING
215 MARTIN LUTHER KING, JR. BLVD., ROOM 312
MADISON, WI 53701

May 11, 2011

On June 16, 2010 Mayor Cieslewicz charged the City's Economic Development Committee (EDC) and staff with making recommendations regarding the review and approval of real estate development projects in the City.

As with any process, the one used in seeing a development through City land use approvals should be routinely reviewed and improved. The Mayor has established several goals for this initiative, calling for a process that is efficient, predictable & uniform, and maintains existing high standards.

In the time since the Mayor's charge to the Committee, staff has solicited and compiled inputs from stakeholders in the development process in Madison. Inputs have been both written and in-person. Previous reports related to the charge were also reviewed and assessed. These included:

- *Streamlining the Development Review & Building Permitting Process*, 2006
- *Evaluation & Analysis of Madison's Development Review & Permitting Process*, 2005
- *Opportunities to Make Madison City Government More Friendly*, 2004

We have taken all the inputs and have worked with City staff that is involved on the day-to-day frontlines in moving a real estate development from concept to completion. This information has been reviewed, discussed, consolidated, and compiled into the attached report. The overall goal is to make the development approval process more conducive to attracting investment, supporting the built environment, creating a modern urban center, and increasing the tax-base and fiscal sustainability of our city.

We are recommending that the Common Council formally accept this report and instruct the City Attorney and responsible department/division directors to begin immediate adoption of the recommendations and, where necessary, formulate detailed ordinance modifications, implementation and budget plans with a deadline of June 1, 2011 in time for inclusion in the City's 2012 budget deliberations.

On behalf of the EDC, we would like to thank all who have taken time to be part of this important initiative to make our city a better place to live, work, raise a family, and do business.

Sincerely,

Douglas Nelson, Chair   Joseph W. Boucher, Vice Chair

ACKNOWLEDGEMENTS

We would like to acknowledge the active participation of many who have given their time and thoughtful consideration to this initiative including:

Alderpersons
Neighborhood Associations
Neighborhood Planning Councils
Neighborhood Business Associations
Business & Trade Associations
City Landmarks Commission
City Urban Design Commission
City Plan Commission
City Department of Planning, Community & Economic Development
City Development Assistance Team
City Office of Organizational Development
Madison residents & businesses

Background and written comments received by the EDC in conjunction with this initiative can be found in the Appendices and on Legistar, File #18121 and File#21454

"FORWARD"

CITY OF MADISON
ECONOMIC DEVELOPMENT COMMITTEE
DEVELOPMENT PROCESS IMPROVEMENT INITIATIVE
May 11, 2011

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"*The starting point for improvement is to recognize the need.*"

Masaaki Imai
Father of Continuous Improvement

THE CASE FOR IMPROVEMENT

Madison is competing with everywhere.

As the nation emerges from the deepest recession since the Great Depression and Wisconsin grapples with budget deficits, sustainable economic growth is more important than ever. In a municipal context, cities are competing for families, workforce, businesses, and investment. Each is necessary to sustain a healthy, stable, and vibrant economy and critical to the fiscal sustainability of the city.

Madison has benefited from the presence of Wisconsin government, the University of Wisconsin – Madison, and Madison College. While hosting these institutions means Madison has a higher percentage of property off the property tax roll relative to other cities, these institutions have offered stability, spurred innovation, jobs, and entrepreneurship, and made countless cultural, intellectual, and social contributions to our community.

Today, though, state budget policy threatens to diminish the ability of these institutions to maintain their past levels of employment and economic activity. Facilitating business development and related investments on taxable property will be increasingly important to Madison's continuing success and sustainability.

Innovation in the way the City processes real estate development proposals is one way to improve competitiveness and fiscal sustainability.

This report focuses on the following strategy for encouraging investment and quality development in our city:

> *Increase Madison's competitiveness for investment and job creation by streamlining the development process, maintaining quality of the built environment, and ensuring efficient, fair, and responsive regulatory decision making.*

Research by professors at the University of Iowa and University of North Carolina, Chapel Hill, published in The Journal of Housing Research[1] states;

> *"In many jurisdictions, the number of months that it takes from application to approval can be quite short. In others, the time period from application to approval of entitlements can be quite long, in effect constraining the amount and timing of development through delays in the review and approval process. While there is no explicit restriction, in practice the delay lengthens the development period and increases the cost to the developer"*

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[1] Xifang Xing, David J. Hartzell and David R. Godschalk, *Land Use Regulations and Housing Markets in Large Metropolitan Areas*

It's not only the city of Madison.

Madison is the hub of an innovative region. It is the urban center and heart of the metropolitan area. It is positioned nationally and internationally as a recognized brand, and is the main driver of the regional economy.

Madison, the region, is compact. Unlike much larger urban centers, the major communities surrounding Madison are relatively close-by and therefore considered as a single economic market in which people choose to live and businesses, together with their related jobs, choose to locate.

Because of this proximity, the city of Madison is competing with surrounding communities while at the same time cooperating as an integral part of overall regional development.

Currently the city enjoys a symbiotic relationship with the communities surrounding Madison. We must be cognizant, however, that this relationship could potentially become detrimental to the city if investment, businesses and families increasingly choose to locate "near" Madison rather than within its municipal boundaries.[2]

Madison currently approves the vast majority of projects submitted. Despite this fact, we continue to be perceived as a "challenging place to do business" by the development community. We can reverse this perception and invite additional applicants and even more investment by improving our reputation and affirming a process that minimizes development costs while obtaining broad stakeholder input to facilitate attractive, productive development and redevelopment.

The development process involves not only commercial, industrial and institutional investment, but also encompasses residential and private infrastructure investments. For that reason, we must keep a simple truism in mind when developing land-use policies:

Innovation, talent, and investment don't care about municipal or state boundaries on a map. They live, work, and raise families wherever it makes the most sense. When it no longer makes sense, for any number of reasons, they move somewhere else.

Most people and their purchasing power do not care if they're shopping, going to a restaurant, or watching a movie in the city of Madison or a mile down the road outside the city limits.

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[2] City of Madison Economic Development Division, "*Economic Dashboard Report 2-26-2010*"

What is the benefit of improving the development approval process in Madison?

By far the most compelling benefits are encouraging investment in the city and maintaining fiscal sustainability and municipal services. With nearly three quarters of the City of Madison's total revenue derived from property taxes[3], maintaining services while keeping increases in the tax levy in check, and potentially reduced, is a significant benefit.

The equation is simple:

Level of Services = Tax Levy X Property Values

The more investment in development (residential and non-residential) and personal property to maintain facilities and operations, the higher the overall property values within the city. The higher the values the greater level of services that can be provided by the existing level of taxes and/or the potential to lower the tax levy needed to support the same level of services.

The proposed state budget contains strict levy limits that make exceptions only for Net New Construction. This report makes recommendations to attract investment and net new construction that is appropriate and enjoys broad community support.

The following table shows Madison's recent record for net new construction.

AVERAGE ANNUAL NET NEW CONSTRUCTION (2005-2010)

Government Unit	Average Net New Construction[4]
Wisconsin Statewide	1.9%
Stoughton	1.6%
Monona	1.9%
Madison	**2.2%**
Middleton	2.6%
Fitchburg	3.0%
Sun Prairie	3.6%
Verona	8.5%
Dane County (w/o Madison)	2.7%
All Dane Co. cities except Madison & Verona	2.8%
All Dane Co. cities except Madison	3.5%
Same plus DeForest and Waunakee	3.5%

Two points are immediately obvious. First, Madison has done well in attracting a reasonable amount of net new construction exceeding the state average and several of our neighbors.

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[3] Total City funding in 2010 comes from its share of property taxes (72%), intergovernmental payments (15%), and local revenues (fees, fines, licenses, permits, PILOT payments, etc.) (13%). The City's share of overall property taxes in 2010 is 35%. The remainder flows to MMSD (47%), the County (11%), MATC (6%), and State of WI (1%). Source: City of Madison 2010 Adopted Operating Budget
[4] Based on 5 year compound annual growth in net new construction 2005-2010; Department of Revenue statistics

Second, Madison has an opportunity to improve its revenue position by facilitating more new construction.

Some of the additional construction in Fitchburg, Sun Prairie, Verona, and elsewhere is driven by population growth and new residential construction. Between 2000 and 2009, Madison's population grew 9.4% while Dane County villages grew 16.4% and other cities grew 16.6%.[5] However, the budget implications make an effort to compete for more new construction worthwhile.

This table shows the potential incremental 2011 property tax revenue had Madison matched the net new construction growth of the government entities identified in the previous table over the preceding 5 years.

POTENTIAL REVENUE GAIN[6]

Benchmark	Incremental 2011 Revenue
Middleton	$3,396,610
Fitchburg	$6,998,160
Dane County (w/o Madison)	$4,267,653
Dane Cities (w/o Madison & Verona)	$5,048,698
Dane Cities (w/o Madison)	$10,931,216
Dane Cities (plus DeForest and Waunakee)	$11,304,209

Given the lower population growth and greater complexity in facilitating infill investment, it is neither fair nor realistic to expect Madison to fully capture this revenue. The chart demonstrates, however, that in an era of budget constraints and strict levy limits, attention to competing for construction can add millions to the city's coffers.

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[5] Regional Trends 2009, Capital Area Regional Planning Commission.
[6] Based on taxable construction

GUIDING PRINCIPLES

Proportionate Inputs

Each group of stakeholders/customers has their respective role to play in the development approval process. Key to streamlining the process is understanding their roles and their proportionate input into the overall approval process.

Ultimate municipal land-use authority by statute rests in the hands of elected officials on the Madison Common Council[7]. There is specific decision-making authority that State statutes or Madison ordinances give to various Board and Commission sub-units such as Plan, Urban Design and Landmarks Commissions. Decision-making authority established by City ordinance can be changed by subsequent actions of the Common Council but State statute cannot.

There are many stakeholders, with and without legislative authority, involved in the development approval process. These can be grouped into two categories; Advisory and Decision-making:

- **ADVISORY**
  - Associations
    - Residents
    - Businesses
    - Property owners
  - Individuals/general public
  - City Committees

- **DECISION-MAKING**
  - Elected Representatives
    - Common Council
  - Boards & Commissions
  - City Staff

Each stakeholder has various interests they represent and each has a unique focus on the balancing act necessary to govern responsibly: balancing short-term wants with long-term needs of the city.

Further impacting effective decision-making is the politics of development. While an elected representative must represent their constituency, it is also their and their fellow elected officials' responsibility to make decisions which benefit the entire city. It is important to note that development decisions are based on standards contained within the City's ordinances and that sometimes leads to friction within districts if a particular development faces opposition but may be good for the city overall. This manifests itself in dealing with proposals that vary from the comprehensive plan, adopted neighborhood plans, zoning map, or projects that some may simply not like based on personal preferences.

For these reasons, this report, in part, focuses on proportionate roles and inputs for each of the stakeholders and attempts to balance local concerns with city-wide concerns.

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[7] State of Wisconsin Statutes, Chapter 62.23(7)

Complete Information
There is no substitute for complete and transparent information except in rare cases involving confidential negotiations or other exceptions allowed by law. The more complete, accurate and timely the information flow between parties involved in the development approval process, the more unlikely it is that roadblocks to efficiency will surface.

Using existing Internet-based concepts to provide useable two-way communication, collaboration and access to information, the City should be able to significantly decrease time involved in the approval process without sacrificing quality or adequate deliberation.

Through advanced use of web-based tools, interested parties, Applicants, and City staff should all have access to complete information and be able to track exactly where a proposal is while going through the process. It is through this tracking that bottlenecks and delays can be identified and addressed.

Empowerment
This principal involves ensuring that the City has the right people, with authority, performing their respective roles in the development process. The City has talented staff in all of the agencies involved in the development review process. Decisions on development approvals should be delegated appropriately to front-line staff with Department and Division authority and support to insure that they are empowered to make decisions within their areas of expertise.

RELATIONSHIP OF COMPREHENSIVE, NEIGHBORHOOD, AND SPECIAL AREA PLANS

Comprehensive Plan/Neighborhood Plans

Plans exist to provide predictability and guidance to stakeholders. Certain development proposals such as zoning map amendments must be consistent with the Comprehensive Plan. Neighborhood plans are supplemental to the Comprehensive Plan. They are used as advisory guides in reviewing development proposals.

Neighborhood plans and the Comprehensive Plan should be regularly reviewed and inconsistencies should be reconciled where they exist by amending the neighborhood plans or the Comprehensive Plan.[8]

The practice has been to work with neighborhoods to develop Neighborhood Plans and Overlay Districts (i.e. Conservation, Historic, and Urban Design Districts.)

http://www.cityofmadison.com/planning/ComprehensivePlan/

CURRENT MISSION STATEMENTS OF PLAN, URBAN DESIGN, AND LANDMARKS COMMISSIONS[9]

State statutes gives land use authority within the city to the Madison Common Council, Plan Commission and Zoning Board of Appeals.[10] The Council may delegate certain additional powers to commissions or boards at its discretion.

The following mission statements are taken directly from the applicable sections of the Madison General Ordinances:

Plan Commission Mission

It is the function and duty of the Plan Commission to make and adopt a master plan for the physical development of the municipality. The commission makes reports and recommendations to the Common Council related to the plan and physical development of the city and on the location and architectural design of public buildings and other public projects. The commission also reviews and makes recommendations on any sale or lease of land, rezoning requests, annexations of land, subdivision plats and ordinance text amendments. The Plan Commission has final approval authority on land divisions (certified survey maps), Conditional Use requests and appeals of certain Urban Design Commission decisions.

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[8] This is routinely done as plans are proposed. This is the method used to resolve inconsistencies between the East Rail Corridor Plan, the Williamson Street Plans, the Tenny-Lapham Neighborhood Plan and the East Washington Capitol Gateway Plan.

[9] City of Madison, *"Boards, Commissions & Committees"* *"Neighborhood Associations"*

[10] State of Wisconsin Statutes, Chapter 62.23(7)

Urban Design Commission Mission
To assure the highest quality of design for all public and private projects in the city; protect and improve the general appearance of all buildings, structures, landscaping and open areas in the city; encourage the protection of economic values and proper use of properties; encourage and promote a high quality in the design of new buildings, developments, remodeling and additions so as to maintain and improve the established standards of property values within the city; foster civic pride in the beauty and nobler assets of the city and, in all other ways possible, assure a functionally efficient and visually attractive city in the future.

Landmarks Commission Mission
The commission shall have the power to recommend to the Common Council the designation of landmarks, landmark sites and historic districts within the city limits of Madison. Designations shall be made by the Common Council, and once designated, such landmarks, landmark sites and historic districts shall be subject to all provisions of Sec. 33.19, Madison General Ordinances.[11]

Development Review Bodies
The Common Council has final authority on rezoning; including Planned Unit Developments (PUDs), annexation, and subdivision requests. The Plan Commission has final authority on conditional use and demolition requests, and is advisory to the Common Council on rezoning, annexation, and subdivision requests. The Urban Design Commission has final authority on requests in Urban Design Districts and is advisory to the Plan Commission on PUDs, Projects in the C4 downtown zoning district, and Planned Commercial Districts (PCD). The Landmarks Commission has final authority on certificates of appropriateness for projects within local historic districts and on projects involving a property with landmark designation.

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[11] The full Landmarks Commission ordinance can be found here: MGO Section 33.19

DEVELOPMENT APPROVAL PROCESS

Development proposals can be grouped into two general categories:
- Simple, or those that are listed as existing permitted uses within the zoning ordinance
- Complex, for those that require board or commission review, Common Council approval, and/or require public investment (i.e. Tax Incremental Financing-TIF)

Simple

Projects that are consistent with the neighborhood and comprehensive plans, comply with all zoning requirements, and do not require public-sector investment (i.e. Tax Incremental Financing or TIF.)

Complex

The flowchart for complex projects that require board/commission review and/or Common Council action can vary considerably depending on the approvals required.

Variations of what is required, the staff personnel and board/commission/committees involved, and the political influences all must be coordinated, processed, staffed and tracked.

The internal, detailed flowchart for the existing complex processes looks like this:[12]
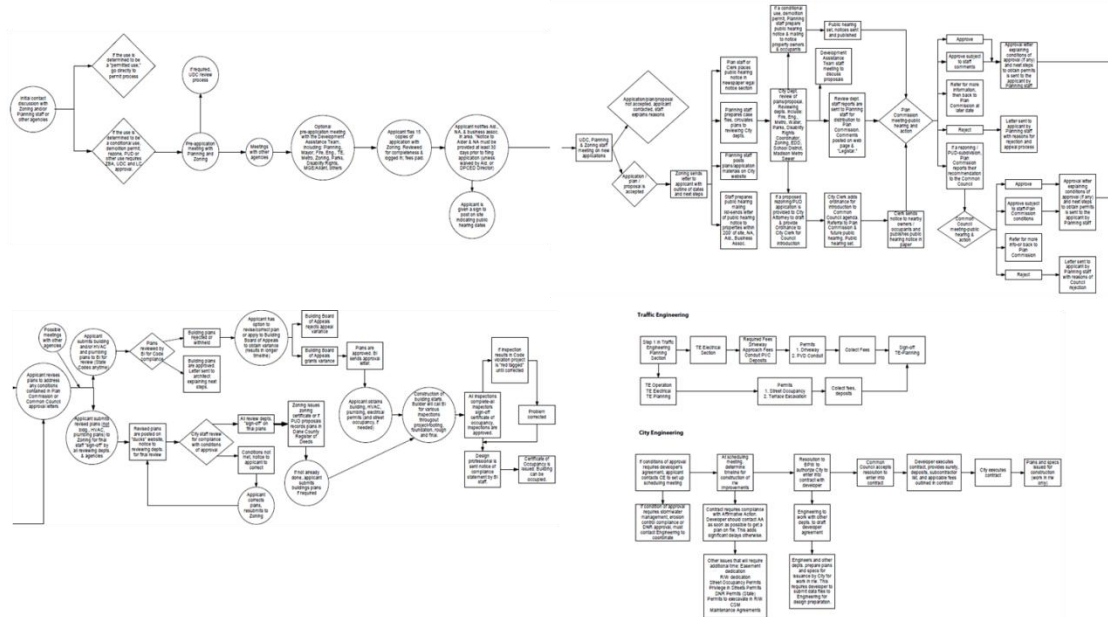
The current average time to move through the conditional use process is 47 days and for a zoning map amendment, 76 days following submission to the City's Department of Planning, Community & Economic Development. The averages do not take into consideration time spent prior to formal application to the City.

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[12] See http://legistar.cityofmadison.com/attachments/80431fc6-5d66-47f7-a7da-91ae476cbca1.pdf

There are, of course, projects that cannot be reviewed within the scheduled timeframes. These are usually associated with complex and public funding of projects but can also apply to what might, on the surface, appear to be a simple project.

Potential delays can occur at any phase of the process; from neighborhood review to the flow through various agencies and boards/commissions, to political deliberations, to legal challenges to a particular proposal or the approval process itself.

Implementation Goal
The one year goal in streamlining the approval process is to achieve acceptance, cooperation and implementation of these recommendations by investors/developers/business owners, property owners, neighborhood and business associations, boards and commissions. Further, to receive Mayoral and Common Council support, and budget allocations for changes to the development process.

The goal/timeline for Simple and Complex projects is diagramed below along with the time anticipated to get to completion of the permitting phase. It should be noted that the timeline can be longer even for permitted uses if the initial submittals do not meet ordinance requirements.

<u>**SIMPLE**</u>

Simplified Plan Review & Inspection Process

Permitted Uses

<u>**Timeline = 3 to 10 business days**</u>

Pre-Application	**Plan Signoff/Permitting**	**Construction/Inspection**
• Project Development • Discussions with Zoning & other agencies	• Site plan concurrent review & sign-off (multi-agency • Building plan review (Building Inspection Division • Fee payment • Permits issued	• Inspect work • Issue orders if necessary • Issue Certificate of Occupancy

COMPLEX

Generalized Zoning, Subdivision, Plan Review, Permitting & Inspection Process

For projects requiring Board or Commission review

(Zoning Map Amendments/PUD, Conditional Uses, Demolition Permits, Urban Design & Landmarks Commissions, Zoning Board of Appeals)

TIMELINE = 3 WEEKS* TO 4 MONTHS**

Pre-Application	Formal Application Submittal / Approval	Plan Signoff / Permitting	Construction / Inspection

• Project Development
• Discussions with Zoning & other stakeholders
	• Board, Commission, and/or Common Council approvals
	• Formal public hearings
	• Identify conditions for approval from multiple agencies
		• Site plan sign-off (multi-agency)
		• Building plan review (Building Inspection Division)
		• Fee payment
		• Permits issued
		
		If needed
		  • Draft Development Agreement for infrastructure (Eng. & Traffic Eng.)
		  • BPWCC approval plans & specs & development contract (Eng.)
			• Inspect Work
			• Issue orders if necessary
			• Issue Certificate of Occupancy

ORGANIZATION OF GOALS & IMPLEMENTATION OPTIONS

The report going forward is divided into four sections:

- **Pre-Application Phase**
  What happens with a development proposal before an application is officially submitted to the City?

- **Application, Review & Approval Phase**
  What happens once the development proposal starts through the City's Staff, commission, board, and Common Council process?

- **Post-Approval Phase**
  After the legislative review and approval, what happens during the City agencies' sign-off process?

- **Administration Improvements**
  What can be done from an administrative perspective to make the process more efficient?

Process goals were developed from careful consideration of all inputs, discussions, and problem solving sessions with external and internal customers of the development review process. These were logically grouped into goals with specific implementation recommendations.

Implementation options are just that, options. It is ultimately up to the Common Council (via ordinance and/or resolution) and the Mayor (via executive-branch policy) to adopt, prioritize and fund.

PRE-APPLICATION PHASE

The following goals focus on the pre-application phase of the project. Pre-application is the time before developers make formal application to the City of Madison. The overarching goal of the pre-application phase of a project is to provide all stakeholders (Alderpersons, developers, neighbors, homeowners, renters, business owners, adjacent commercial property owners, neighborhood and business associations) an opportunity to learn about both the proposed project and the vision of the surrounding neighborhood. Clear information and open communication are the hallmarks of a good pre-application phase.

The desired outcome of the Pre-Application Phase of a project is ultimately a decision by the potential Applicant on whether or not an application should be submitted to the City. If an Applicant decides to proceed with an application, this phase also provides information that will help the Applicant develop a proposal that captures both the positive attributes of the project desired by the surrounding neighborhood, as well as addressing concerns that have been raised to best of the Applicant's ability.

The Pre-Application Phase is not the point in the project when proposals are approved or rejected. The pros and cons of a project are weighed. If a formal application is submitted, it is reviewed, revised, approved, denied or approved with modifications, by the City (through the Landmarks Commission, Urban Design Commission, Plan Commission and/or Common Council.)

> *For the purpose of this report, "neighborhood stakeholders" collectively refers to Alderpersons, neighborhood associations, neighborhood business associations, residents, property owners, business owners, and other interested parties.*

A. GOAL: Establish predictable, consistent processes and expectations for neighborhood stakeholders & staff review of development proposals during the Pre-Application Phase of projects.

1. *Require first point of contact in the Pre-Application Phase of the project to be with the Department of Planning & Community & Economic Development (DPCED.)*

    a. *Require developer/property owner to register project via web-based system.*

    The Municipal Ordinance currently requires 30-day notification for many development projects requiring Commission/Council approval before an Applicant can formally submit an application to the City of Madison. This minimum 30-day notification period is part of the Pre-Application Phase of the project. It is recommended that the 30-day notification period be maintained with the start of the period triggered by registration of the project with DPCED.

    Through the City's website, a standardized registration form should be provided, which would include basic information about the proposed project

and Applicant[13]. Registration through this system would generate automatic notification to Alder(s), neighborhood stakeholders, other interested parties, and City staff within a specified proximity to the project. Included may also be list-serves of any interested individuals desiring notification of projects within certain geographic areas of the City, or city-wide.

Registration through this system would also populate a project-specific webpage that would serve as a depository of information regarding the project for the balance of the Pre-Application, Application, Review, and Post-Approval of the project. As noted later in this report, this webpage would be linked to the City's legislative website (Legistar) and the enterprise land and asset management system (ELAM). This would be a publically-available webpage that would, in effect, provide a virtual one-stop-shop for information about a specific project. Prior to or after this notification being provided, a meeting with Zoning and Planning Division staff is essential in order for the applicant to understand the ordinance standards that will apply to the project and how the project conforms to adopted City Plans.

Implementation: Near-term, 2011, 2012. Ordinance amendments would be required to change the notification process. Additional budget allocation may be required to develop the project-specific webpage system noted above, along with allocation of existing staff resources necessary to input information and maintain the system once it has been developed.

2. ***Standardize the process of notification and review of Projects during the Pre-Application Phase of the project.***

   a. ***Meet with Alder(s), Neighborhood Association President(s) or their designee, Neighborhood Business Association President(s) or their designee, and DPCED staff to determine the structure of the Pre-Application Phase of the project.***

   Planning Division should work with neighborhood associations and other neighborhood stakeholders to develop and agree to a standardized format for their review of development proposals to be adopted citywide.

   Once a project has been registered as noted above, require meeting(s) within the 30-day notice period with all of the following individuals invited to participate: the Applicant, Alder(s), Neighborhood Association President(s) or designee, Neighborhood Business Association President(s) or designee, condominium or homeowner association representatives (if appropriate) DPCED staff, and other appropriate stakeholders. The purpose of this meeting will be to discuss and determine how the project in question should proceed through the Pre-Application Phase of the process.

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[13] See Appendix G & H for examples of development project questionnaires from Capitol Neighborhoods, Inc. and Marquette Neighborhood Association. A standard registration form would include many of the attributes from these questionnaires.

When and where should meetings occur? Who should attend? How should information be distributed throughout the neighborhood and how will information be transmitted back to the Applicant and City? What level of project facilitation on the part of DPCED staff is desired? The purpose of this initial meeting is not to discuss the merits of the project in question, but rather, to come to an understanding on what is needed for an effective Pre-Application Phase of the project.

Pre-application expectations should also be set at this initial meeting. What type of detailed information do neighborhood stakeholders desire to see at this phase of the project; and, what level of detailed information can the Applicant provide?

Every effort should be made to strike a balance between neighborhood stakeholders' desire for detailed information and the Applicant's desire for flexibility and limited financial exposure during this Pre-Application Phase of the project.

Planning Division should work with neighborhood associations and other neighborhood stakeholders to develop and agree to a standardized format for their review of development proposals. Examples are available from some neighborhood associations and would ideally be standardized and adopted city-wide.[14]

Implementation: Near-term, 2011, no ordinance amendments would be required.

b. ***Enhance notification of projects to broadest possible group of neighborhood stakeholders as possible.***

Once the framework for the Pre-Application phase of the project has been finalized, every effort should be made to distribute information about the project and the review process to the broadest possible group of neighborhood stakeholders.

When the developer registers the development project, a public notification strategy should be developed by the developer with input from the alderperson, neighborhood association, and City staff. Coordinated efforts should be discussed by all of the parties to leverage resources.

The project webpage noted above will serve as a depository for project information, as well as information regarding the review process. It will be necessary; however, to alert all neighborhood stakeholders of this project webpage, which can be done through the following:

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[14] See Appendix G & H; CNI has a written and tested review process guide which could provide a basis for this goal

- Significantly increasing the printing and postage budget of the Common Council Office to enable Alders to send notices to residents, business owners and property owners within their districts alerting them to projects entering the Pre-Application phase and directing them to the project webpage for additional information.
- Additional signage at the project site alerting neighbors of the project, and more importantly, the project webpage where they can receive additional information about the project.
- Alder(s), Neighborhood Association(s), and Neighborhood Business Association(s) websites and newsletters.
- Use of the City's *My Madison* feature to enable interested stakeholders to voluntarily sign-up to receive emailed project updates and meeting notices.

As the neighborhood moves through its review of a project, neighborhood stakeholders are encouraged to post meeting information through the project webpage.

Neighborhood stakeholders are also encouraged to post meeting notices at other prominent places around the neighborhood, such as community message boards of retail establishments, public libraries, and digitally through neighborhood list serves.

Neighborhood stakeholders should also be encouraged to utilize the City's *My Madison* feature to broadcast meeting notices.

Implementation: Near-term, 2011, 2012, no ordinance amendments would be required. Budget allocations would be required for the project webpage system and to integrate it with the Enterprise Land and Asset Management System (as noted earlier), along with funds for Common Council postage and printing.

3. ***Provide Applicants with access to "Participating in the Development Process: A Best Practice Guide for Developers, Neighborhoods & Policymakers" and update this guide periodically.***

    The city maintains a helpful document outlining Madison's development process available at:

    http://www.cityofmadison.com/planning/bpg_final_for%20weba.pdf

    Applicants should be directed to this guide to help them prepare to participate in the development process. Being prepared and understanding Madison's development process can save time, money, and frustration. The guide should be periodically reviewed and updated to remain current.

    Implementation: Near-term, 2011, no ordinance amendments would be required.

PRE-APPLICATION PHASE

B. GOAL: Inclusive, fair, and uniform neighborhood input into development projects

1. *Encourage neighborhood review of a development proposal in such a manner that incorporates different perspectives through a variety of different means.*

    All neighborhoods within the City of Madison are unique and include a diverse mix of homeowners, renters, commercial property owners, and businesses that may have different and unique perspectives and ideas regarding proposed development projects. Every effort should be made to insure that broad arrays of neighborhood stakeholders are provided with an opportunity to provide feedback regarding projects.

    Implementation: Near-term, 2011, no ordinance amendments or budgetary allocations would be required.

2. *Enable City staff to better facilitate meetings between Applicants and neighborhood stakeholders when needed.*

    Neighborhood stakeholders depend on timely and accurate information to be able to provide valuable feedback regarding development proposals. City staff should be enabled to assist with the collection and dissemination of project information to neighborhood stakeholders. Likewise, City staff should help Alderperson(s) and neighborhood stakeholders facilitate neighborhood meetings, especially in the case of complex and controversial projects.

    Implementation: Near-term, 2011, no ordinance amendments; however, additional budgetary allocation may be required for project facilitation.

3. *Encourage stakeholders to provide comments on the project that reflect a range of viewpoints in lieu of a specific recommendation*

    Encourage Neighborhood Association(s) and Neighborhood Business Association(s) to provide the Applicant, Alder(s), and DPCED staff with written comments on the proposed project during the Pre-Application Phase of the project rather than providing a specific recommendation or position at this stage of the process. What does the neighborhood like about the project? What does the neighborhood have concerns about, and how might those concerns be addressed? What suggestions does the neighborhood have for improving the project? How strong is the sentiment regarding the Project? What contrarian viewpoints have been provided? Policymakers would also appreciate disclosure of stakeholders' interests.

    These comments should be provided to the Applicant, Alderperson(s), and DPCED staff so that they can be posted on the project webpage and become part of the official record of the project.

As noted earlier, the primary purpose of the Pre-Application Phase of the project is to provide the Applicant with information about how the neighborhood views the project in an effort to help the Applicant make a determination regarding whether and/or when to make a formal application to the City, and in what form. Specific recommendations, positions, and "votes" on a project do not need to occur prior to the project being formally submitted and can occur during the formal review process once an Applicant has applied.

Implementation: Near-term, 2011, no ordinance amendments or budgetary allocations required.

4. *Encourage stakeholders to utilize a variety of means to secure neighborhood stakeholders' feedback during the Pre-Application phase.*

Some individuals may not have the availability to attend scheduled meetings due to work schedules and other commitments. Every effort should be made provide alternative platforms for receiving community feedback. The use of the Internet, especially through email and social media, should be encouraged as a way for individuals to provide comments. The use of surveys may be another source of feedback.

Implementation: Near-term, 2011, no ordinance amendments or budgetary allocations required.

5. *Encourage developers to engage neighborhood stakeholders early in the process, even before plans are fully developed.*

Input into the program of a developer and early input on design can be productive, can save developers cost, and can result in a better final product.

Implementation: Near-term, 2011, no ordinance amendments or budgetary allocations required.

PRE-APPLICATION PHASE

C. GOAL: Increase property and development information available to residents, property owners, and investors/developers.

Even before a developer is ready to begin the Pre-Application Phase, he or she will need access to as much information as is reasonably possible regarding the property where development is desired. Neighborhood stakeholders will likewise be interested in as much project information as possible as a project moves through Pre-Application, Application, and Review Phases.

> 1. ***Increase and enhance the amount of property information that is available in a web-based, digital format.***
>
>> Work on the development review process identified the following changes to the way in which the City maintains and presents property information as being desirable:
>>
>>> i. Note within the City's current web-based *Property Lookup* feature whether or not a property falls within an Urban Design District or designated Historic District, and include a link to the requirements for said District.
>>> ii. Provide a link within *Property Lookup* to all neighborhood, comprehensive, and other planning documents that have a direct spatial relationship to the property in question.
>>> iii. Provide a link within *Property Lookup* to all neighborhood associations and neighborhood business associations that cover the area where the property is located.
>>> iv. Fully digitize and catalogue all property information maintained by the City, and provide links to this information through *Property Lookup*.
>>> v. Develop and maintain a catalogue of all plans and studies that have a spatial impact on the City, and provide an "order of control" that explains the relationship between documents, especially when conflicting recommendations exist.
>>
>> Implementation: Uncertain timeframe. Additional staff and budgetary allocation will be required, especially for the full digitization of property records. No ordinance amendments required.
>
> 2. ***Enhance the information that is available to guide residents, business owners, property owners, and prospective developers as they are preparing applications.***
>
>> Work on the development review process also identified the following changes to the type of information that is available to residents, property owners, and developers that would be desirable as individuals prepare applications to submit to the City:
>>
>>> i. Publish a single list of all development-related fees, and provide a web-based tool to assist applicants with calculating their likely permit fees.

ii. Expand utilization of the Development Services Center website to provide even more detailed directions on applying for projects. In other words, continue to replace statements that read "contact staff for information" with the information that the City wishes to provide.

iii. Continue to make owner/occupant mailing lists available to developers for purchase.

iv. A standardized form of pertinent site characteristics, and existing City policies and plan recommendations (such as existing zoning, Comprehensive Plan land use designation, overlay districts, and adopted neighborhood plan recommendations) should be completed by City staff as part of the Pre-Application phase.

Implementation: Near-term, 2011, no ordinance amendments or budgetary allocations required.

APPLICATION, REVIEW & APPROVAL PHASE

The following goals focus on the application, review and approval phase of the project. It begins when the applicant makes the formal submittal to the City and the application is added to the list of projects to be reviewed by the appropriate staff, commission or board and Council if needed. All boards and commissions and the Council allow public testimony on the application.

D. GOAL: Clarify and simplify the process for development proposals that require more than internal staff approvals.

1. ***Classify development proposals based on the approvals that are required using a two tiered system: one for simple projects (permitted uses) and another for more complex projects (those requiring approval by boards, commissions or the Common Council).***

    The Zoning Administrator is charged with the responsibility of determining whether a proposed use is a permitted use under the Zoning Code.

    The City currently has a process in place which differentiates between "permitted uses" as simple projects and those requiring review by a board or commission; "complex projects."

    The revised Zoning Code will make more types of development in the City of Madison permitted uses as of right rather than requiring approval by a board or commission, which should reduce the number of projects requiring extensive review by boards and commissions. The new Zoning Code will also include additional design standards which should provide more information to potential developers at the beginning of their due diligence process.

    The new code should result in the reduction of the use of Planned Unit Developments which are more cumbersome and time consuming for applicants and staff. A broader range of up-to-date districts should replace the use of Planned Unit Developments in most cases. Following the adoption of the new zoning ordinance, the City should undertake a review of the development process within 18 months.

    Implementation: Near-term, 2011, ordinance amendments required, no additional budget authorization needed.

2. ***Identify and propose changes to empower staff to grant administrative approvals where appropriate.***

    Give DPCED Director and each commission/committee the ability to identify and define when it is appropriate to have items approved through administrative review and when it is appropriate for the item to go before commission/committee for review and approval.

    Implementation: Near-term, 2011, Common Council ordinance change required, no budget authorization required.

APPLICATION, REVIEW & APPROVAL PHASE

E. GOAL: Improve effectiveness of Commissions/Committees/Boards.

1. *Review and revise at a minimum of once every ten years, commission and board mission statements with review and approval by Common Council.*

    The mission statements of the Plan Commission, Landmarks Commission, Urban Design Commission and Zoning Board of Appeals are found within City ordinance. Each should be reviewed and revised if necessary to clarify the duties and responsibilities and the purpose of each entity.

    The Common Council with guidance from staff of the aforementioned commissions and boards should work to ensure that mission statements of these bodies do not overlap with one another.

    Implementation: Near-term, 2011, potential ordinance amendments required, no budget authorization needed.

2. *Provide meaningful and effective orientation for all new commission, committee and Common Council members and neighborhood stakeholders.*

    a. **Staff for each commission/committee/board should develop a formal orientation and training program**.

    Staff should work with the Organizational Development and Training Office[15] to develop a formal training program for each commission/committee/board. This training should involve a review of the commission's mission, processes, standards for the review of projects and timelines. The inter-relationship between boards and commissions should be included. The training program should review the manner in which commission meetings are conducted and the interactions among members, applicants and the general public appearing before the commission. Ensure that meetings are conducted in a respectful manner, staying on task and checking with applicants to ensure that they understand the recommendations made by commission members. Invite neighborhood associations, business associations and neighborhood stakeholders to attend training sessions.

    Implementation: Near-term 2011, 2012, no budget authorization needed.

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[15] See Recommendation N

   b. ***Develop a Mentoring Program for new members****.*

   New members should be assigned a more senior member of the commission/committee/board to work with during their first year as a member of the commission. The Chair of the commission/committee/board should make these assignments.

   Implementation: Near-term, 2011.

   c. ***Provide an annual review of projects approved by the boards or commissions or committees****.*

   A self-critique and review should involve projects approved by just one commission and projects such as Planned Unit Developments reviewed by the Urban Design Commission, Plan Commission and Common Council. Tours can be focused on the work of each commission and could involve joint tours with more than one commission.

   Implementation: Near-term, 2011, no budget authorization required.

3. ***Encourage recruitment and retention of diverse membership on commissions, committees and boards.***

   Efforts should be made to recruit and then retain talented citizens that reflect our community's diversity to serve on city commissions, committees, and boards.

   Implementation: Near-term, 2011, no budget authorization required.

APPLICATION, REVIEW & APPROVAL PHASE

F. GOAL: Streamline and clarify Commission review of applications.

1. *Schedule joint presentations/meetings for large projects where there is significant overlap of information required (e.g. Plan Commission and Urban Design Commission).*

   Implementation: Near-term, 2011.

2. *In Commission meetings, establish a procedure to allow presentations for up to 10 to 15 minutes for the development team and to recognize that for controversial cases, the same amount of time may be appropriate for the "opposition."*

   For most projects, the commission's current standards related to speaking can be maintained (e.g. the Plan Commission's policy of limiting speakers to three (3) minutes which can be extended by one (1) minute if there is no objection from a member of the body, which generally works quite well).

   Implementation: Near-term, 2011.

3. *For those commissions which do not currently use a consent agenda, institute the consent agenda process where appropriate.*

   Implementation: Near-term, 2011.

4. *For any item referred by a board or commission, the commission should specify the reason for the referral and the specific items which need to be addressed prior to the project returning to the board or commission.*

   At the start of the subsequent meeting the Chair should review the reason for referral with the commission.

   Implementation: Near-term, 2011.

5. *Commissions should differentiate between "conditions of approval" that are based in city ordinance requirements and those which are recommendations from the board or commission.*

   Implementation: Near-term, 2011.

6. *Supply the applicant with all staff reports and recommended conditions of approval one (1) week in advance of the public hearing/commission meeting.*

   Implementation: Near-term, 2011.

7. *Maintain Landmarks Commission in its current form*.

    a. Continue to allow staff approval of small projects

    Implementation: Near-term, 2011.

    b. Continue meeting two times per month to facilitate prompt review of projects.

    Implementation: Near-term, 2011.

    c. For projects requiring review by both the Urban Design Commission and the Landmarks Commission, encourage the Landmarks Commission review to precede the review by the Urban Design Commission. Structure Landmarks Commission approval to allow staff review and sign-off on changes required by other commissions.

    Implementation: Near-term, 2011.

    d. Amend the Landmarks Ordinance to make it easier to interpret while not diminishing its effectiveness.

    Implementation: Near-term, 2011, ordinance amendment needed.

    e. Work with the Landmarks Commission to evaluate the potential to institute a simple recommendation process for projects which require approval by the Plan Commission or Common Council with the following options:

        i. Approval of development plan as presented.
        ii. Approval with recommended conditions.
        iii. Rejection of development plan with written reasons and provision of conditions whereby the project would be acceptable
        iv. Single referral with written reasons

    Implementation: Near-term, 2011.

8. *Maintain Urban Design Commission in its current form.*

    a. Maintain the ordinance requirements whereby the Urban Design Commission is advisory to the Plan Commission on certain types of Conditional Use permits and Planned Developments.

    Implementation: Near-term, 2011.

    b. Update Urban Design District ordinance requirements to provide for more specific, objective standards. These Urban Design Districts function as overlay districts to the existing base zoning for a property.

    Implementation: Urban Design District ordinances should be reviewed and updated at a minimum of once every ten years.

c. Amend Urban Design Ordinance to allow staff to approve small projects within Urban Design Districts and alterations to projects.

Implementation: Near-term, 2011, ordinance amendment required.

d. Integrate the Urban Design Commission application process into the Plan Commission/Common Council application and scheduling process. Currently a separate application is required for Urban Design Commission review. Consider requiring one application for Urban Design Commission, Plan Commission and Common Council review. Consider amending the schedule and timeline for Urban Design Commission projects to allow time for a written staff report to be provided to both the Urban Design Commission and the Plan Commission prior to action by either commission.

Implementation: Near-term, 2011, no ordinance amendments would be required.

e. Require the Urban Design Commission to evaluate the potential to institute a simple recommendation process for projects which require approval by the Plan Commission or Common Council with the following options:

    i. Approval of development plan as presented.
    ii. Approval with recommended conditions.
    iii. Rejection of development plan with written reasons and provision of conditions whereby the project would be acceptable
    iv. Single referral with written reasons

Currently for projects requiring approval by the Plan Commission or Common Council, the Urban Design Commission uses a practice of granting "initial approval" or "final approval" of a project when in actuality, the Commission is making a recommendation to the Plan Commission and Common Council and it is the Plan Commission or Common Council which is actually approving the project. In some cases projects need to return to the Urban Design Commission for "final approval" of the project after the Plan Commission and Common Council have approved the project. (See matrix)

Implementation: Near-term, 2011.

f. Work to identify the type of signage projects which can be approved by staff which may deviate from the strict ordinance requirements. The Commission and staff would need to identify those signage projects that can be administratively approved and the criteria that staff would use to approve projects that do not comply with the standards of the ordinance, similar to the method used by staff to approve parking reductions.

Implementation: Near to mid-term, 2011-2015, ordinance amendments required.

g. Remove the requirement that Façade Improvement Grant projects be referred to the Urban Design Commission for approval unless the project is

located within an Urban Design District or would otherwise require Urban Design Commission approval.

Implementation: Near-term, 2011, Common Council resolution required.

9. **Maintain the Plan Commission in its current form**.

    a. Consider appointing a member of the City's Urban Design Commission to the Plan Commission (or vice versa) as a way to improve the communication between the commissions and avoid misunderstandings related to recommendations and comments. Clarify and formalize the role of the Plan Commission and Alcohol License Review Committee for projects which require review by both entities (i.e. outdoor eating areas and beer gardens).

    Implementation: Near-term, 2011, ordinance amendments may be required.

    b. Require the Plan Commission to evaluate the potential to institute a simple recommendation process for projects which require approval by the Common Council with the following options:

        i. Approval of development plan as presented.
        ii. Approval with recommended conditions.
        iii. Rejection of development plan with written reasons and provision of conditions whereby the project would be acceptable
        iv. Single referral with written reasons

    Implementation: Near-term, 2011.

APPLICATION, REVIEW & APPROVAL PHASE

G. GOAL: Develop Clear Standards for Application Materials and Review Criteria for Applicants, Staff and Public Use.

1. *Review all application forms used for the review and approval of development plans to ensure that all required information is presented in a clear/uniform fashion. Develop checklists to be used by staff to determine whether an application is complete.*

   Implementation: Near-term, 2011.

2. *Integrate the Enterprise Land and Asset Management (ELAM) system with the City's Legislative Information Center and the Development Services Center website.*

   Currently there are several places on the City's website where development information can be obtained. Ensuring that development related information on current projects, past projects, application materials, schedules, and development standards can be found in a centralized location continues to be an unmet objective. All documents posted online should have a date and label which clearly identifies the document.

   Implementation: Mid-term, additional budget allocation may be necessary.

3. *As identified in the 3-5 year Strategic Economic Development Implementation Plan, develop and utilize a benefit-cost model to measure the economic impact of key development projects and to align TIF and other City Economic Development Tools with the benefits received.*

   The intent is to gauge the community benefits being derived from a proposed project compared with potential public investments. The development of a benefit-cost or fiscal impact model will require a capital outlay to develop the model and the identification of appropriate staff resources to maintain the model and to run the model for "key development projects."

   Implementation: Near to mid-term, the scope of work will need to be identified, and budget allocation will need to be provided.

APPLICATION, REVIEW & APPROVAL PHASE

H. GOAL: Designate project staff/liaison as a means for efficient application review.

1. *Assign a staff project liaison to all complex projects.*

   For projects requiring board and commission approval assign a staff person within the department to be the point person or liaison for the project. The Planning Division currently assigns a Planner as the point person for all development projects requiring Plan Commission and Common Council approval.

   The role of the point person should be reviewed with a view toward assigning project managers to the largest, most complex projects. These project managers would be assigned to shepherd the most complex projects through the review and approval process. The work of the project manager would continue the work currently being done to help educate applicants, help to resolve inter-agency/inter-commission conflicts, help applicants obtain timely feedback from all stakeholder groups, and schedule meetings with affected parties to resolve issues. This is a very similar role that Planning Division staff currently plays with all projects. However, the expectation is that more frequent meetings, a potentially longer pre-application process, and a potential need to resolve significant issues would be greater and the need to involve senior level staff and division directors in these most complex projects would be likely. This project liaison will also be responsible for coordinating with the expanded use of the Development Assistance Team (DAT) noted below.

   Implementation: Near-term, 2011, no additional budget authorization required, Training for project managers to be provided by the Organizational Development and Training Office with help from division managers.

2. *Require relevant staff from the "Development Review agencies" to attend those commission meetings at which a project is under consideration and where their presence is needed. Empower staff to speak on behalf of their agency at these meetings.*

   Implementation: Near-term, 2011.

3. *Expand the use of the Development Assistance Team (DAT).*

   The Development Assistance Team meets every Thursday morning to review development projects which come before the Plan Commission, Urban Design Commission, Landmarks Commission, and Common Council to review conditions of approval and reconcile potential conflicts. The team also meets with potential applicants prior to the submittal of formal applications to review and provide early comments on development concepts. The role of the team could be expanded. Comments on development concepts and the identification of remaining issues to be addressed could be formalized and put in writing for potential applicants, Alders and neighborhood stakeholders. An additional opportunity for applicants to meet with the team could be provided after

applications are submitted and formal recommended conditions of approval are available.

Implementation: Near-term, 2011, no budget authorization is required.

POST-APPROVAL PHASE

The goal in this phase focuses on the follow-through after a project is approved. This phase deals with completing the details called for in the approval. Actual construction permits cannot be issued until these items and sign-offs are completed by the applicant and City staff.

I. GOAL: Better coordinate/expedite City agency sign-off on approved development plans.

1. *Expand the role of the Development Assistance Team in the post-approval process by offering meetings with the team or appropriate staff to discuss and clarify conditions of approval.*

    Implementation: Near-term, 2011, 2012, no budget authorization is required.

2. *Establish clear timelines for staff review of projects submitted for staff sign-off. Provide periodic reports on the time it takes for agencies to check out plans and review plans to division heads, the Mayor, and relevant boards and commissions.*

    Implementation: Near-term, 2011, 2012, no budget authorization is required.

3. *Gather applicant feedback from stakeholders through the use of surveys, interviews and post-approval project meetings. Incorporate the feedback into the updates of the "Participating in the Development Process, A Best Practices Guide".*

    Implementation: Near-term, 2011, 2012, no budget authorization is required.

ADMINISTRATION IMPROVEMENT

These goals focus on how the City reviews applications, informs and educates all stakeholders in the development review process. Maximizing the use of technology to create a transparent review process for all stakeholders is a major theme of the goals in this section.

J. GOAL: Neighborhood plans, training and feedback.

1. **Keep the City's Comprehensive Plan and neighborhood plans up to date**.

   Neighborhood plans are supplements to the Comprehensive Plan but are not adopted as part of the Comprehensive Plan. The plans are used as guides in reviewing development proposals. State law requires that certain development proposals such as zoning map amendments must be consistent with the Comprehensive Plan. The City's Comprehensive Plan should be reviewed periodically to ensure that inconsistencies between the Comprehensive Plan and neighborhood plans are reconciled. Neighborhood plans should be reviewed and updated ideally every five years. Neighborhood plans should be presented in a standardized format which makes it easy for customers to refer to and find relevant recommendations in any neighborhood plan they pick up.

   Implementation: Near to mid-term, budget authorization will be required as resources are not currently available to keep neighborhood plans up to date on this schedule.

2. **Neighborhood plans should consider economic feasibility and market realities.**

   Neighborhood associations have a role in developing economic criteria by which the EDC and other boards/commissions/committees can consider in reviewing neighborhood plans. Staff should work with neighborhood associations to develop a guide for staff and neighborhoods to use in crafting neighborhood plans sensitive to economic and market factors.

   Neighborhood plans should be referred to the Plan Commission, Long-Range Transportation Planning Committee, Economic Development Committee, and other relevant boards and commissions for recommendation prior to adoption by the Common Council.

   Implementation: Near to mid-term, budget authorization will be required as resources are not currently available to complete economic feasibility studies for neighborhood plans.

3. **Develop enhanced training**.

   a. **Customer service training for City staff involved in the development review process**.

      Work with the Organizational Development and Training Office to develop a customer service training program for all staff involved in the development review process from all agencies. Reinforce the Department of Planning and Community & Economic Development's

Customer Service Mission with all staff involved in the process. In summary, this philosophy states that "we will act as if our agency's existence is directly tied to the quality of service we provide." This means: putting our customers as the focus of everything we do, educating first, enforcing when necessary, supporting and inspiring each other and continuously working to improve our services.

Implementation: Near-term, 2011, 2012, no budget authorization is required.

b. **Staff for the Plan Commission, Landmarks Commission, Urban Design Commission and Zoning Board of Appeals should work with the Organizational Training and Development Office to prepare training materials for each development review entity.**

These materials should also be used to provide training opportunities for the Common Council and neighborhood stakeholders. Develop these training modules so that they can be accessed more frequently, via the web or city channel.

Implementation: Near-term, 2011, 2012, no budget authorization is required.

c. **Provide a small annual stipend to members of the Plan Commission, Landmarks Commission, Urban Design Commission and Zoning Board of Appeals to off-set the cost of attending conferences or training related to their respective roles.**

A policy, similar to that used for City staff, should be adopted regarding how commission and board members receive authorization and reimbursement for conference and training expenses.

Implementation: 2012, budget authorization is required.

d. **Increase funding for and encourage all staff involved in the development review process to regularly attend conferences and training opportunities for their respective fields.**

Implementation: 2012 and beyond, budget authorization is required.

4. **Develop feedback protocols.**

Provide a variety of mechanisms for applicants, neighborhood stakeholders and others to provide feedback on the development review process. The use of online surveys, comment cards at the front desk, and post-approval interviews are all tools which should be used.

Implementation: Near-term, 2011, no budget authorization required.

5. *Host an annual meeting for architects, developers, engineers and project managers to discuss City policies to identify concerns, problems, or changes which should be addressed and to suggest changes to the development review process.*

Implementation: Near-term, 2011, no budget authorization required.

ADMINISTRATION IMPROVEMENT

K. GOAL: Development guidelines, website and Development Assistance Team.

1. *Update development guidelines.*

   Review all brochures, information pamphlets, application forms, flowcharts and checklists to ensure that the application materials which are available to customers are up-to-date and comprehensive. Provide this information through the City's website and in printed form.

   Implementation: Near-term, 2011, some budget authorization may be required.

2. *Prioritize the restructuring of the Department of Planning and Community & Economic Development website to provide a direct link from the City's homepage, and to incorporate web modules from Best Practice cities.*

   Direct links should be provided to the Development Services website, the Enterprise Land and Asset Management System and the Legislative Information Center. Customers should be able to track all projects involved in all stages of the development review, approval, and construction process.

   Implementation: Near-term, 2011, some budget authorization may be required.

3. *Review and expand the use of the Development Services Center website first implemented in 2009.*

   The website brings together the requirements of the City agencies involved in the development review process, application forms, schedules, checklists and access to other relevant information needed by customers of the process.

   Implementation: This review should be undertaken with the update of the Department website.

4. *Clearly establish and publicize on the Development Services Center website the process to hear appeals of administrative rulings by City staff.*

   For example, if Planning staff is not willing to support the approval of an alteration to an existing Conditional Use, the applicant can apply to the Plan Commission to have the request considered. Any decision which involves an interpretation of the Zoning Code can be appealed to the Zoning Board of Appeals. Interpretations of the Building Code are appealed to the Building Board of Appeals.

   Implementation: Near-term, 2011, 2012.

ADMINISTRATION IMPROVEMENT

L. GOAL: Physical facilities to facilitate development review process.

1. *Implement the Development Review and Permitting Center (the physical one-stop-shop).*

    The City has budgeted for the remodeling of the Madison Municipal Building to create the one-stop-shop. The area should contain a single greeting area where a receptionist can direct customers to appropriate areas and to set appointments for customers with Plan Reviewers, Zoning staff and staff from other agencies. The area should also contain small conference room spaces within the Department for inter-agency meetings with developers. All conference rooms should be directly linked to the City's Geographic Information System layers including zoning, utilities, roads, and other infrastructure and property information. The space should also include a suitable lobby space for customers to wait and to discuss projects informally, space to display informational brochures, the creation of a development resources center with relevant ordinances, brochures and special area plans, neighborhood plans, etc. and a business center for applicants to present and discuss plans. The current space is woefully inadequate and conveys a poor first impression on our customers.

    Implementation: 2012/2013, implementation will need to be coordinated with the planning for the redevelopment of the Madison Municipal Building and Government East Block so budget authorization will be required.

2. *Renovate the Common Council chambers so everyone can see presentation materials including the direct linkage of presentation materials through the web and City Channel.*

    Implementation: 2012, budget authorization is required.

3. *Install permanent computers and projectors within all meeting rooms used for development review meetings.*

    Currently, Room LL-110 in the Madison Municipal Building and Room 108 in the City-County Building are outfitted with projectors and computers which provide access to the internet, City file servers and GIS layers. The City Council chambers, 260 in the Municipal Building and LL-130 in the Municipal Building should also be provided with the same equipment.

    Implementation: 2012, budget authorization will be required.

ADMINISTRATION IMPROVEMENT

M. GOAL: Revisit and review the development process on a regular basis to identify improvement opportunities.

As stated in the introduction of this report, any process can and should be reviewed and improved on a regular basis. Require DPCED to review the development process on an on-going basis looking for inefficiencies and opportunities to improve. At a minimum of once every three years, require the staff to review the development process with particular attention to the web initiatives and issue a report to the Common Council.

Implementation: Ongoing, with possible future ordinance changes and budget amendments as needed.

ADMINISTRATION IMPROVEMENT

N. GOAL: Invest in organization development, orientation, and training for staff to facilitate the development process

> The Economic Development Committee thought it important to emphasize organizational development, orientation, and training. This section initially appeared as an appendix, and the EDC decided to make it a recommendation to highlight the importance of these issues.

> **Process Improvement**
> Participate or facilitate team meetings of various groups involved in Development Process improvement initiative.

> Work with staff teams on issues, identify roadblocks and create strategies for improving team dynamics and information flow.

> Help create organizational structure and position description that supports project management role in Planning, Community and Economic Development

> Gather input from neighborhood groups and alders on issues and concerns and help craft recommendations on neighborhood input

> Help develop process for neighborhood input

> Provide staff with just-in-time training on process improvement techniques

> **Training and Orientation**
> Help create and deliver programs around the Development Process to various audiences.

> **Specific Board, Commission and Committee (BCC) Training programs (**Bi-annually or as needed basis.)
> > Role of BCC in process
> > Overview of process
> > > Simple projects
> > > Complex projects
> > > Timing
> > > Neighborhood roles
> > > Alder roles
> > Impacts on Process

> **Orientation to Development Process for Neighborhood (NH) groups** (NH meetings, as needed with various groups, NH Roundtable and Summit sessions)
> > Overview of Development Process
> > > Simple projects
> > > Complex projects

Roles of BCC
Roles of alders
Plans (Comprehensive, Neighborhood, district) and how they impact process
Role of Neighborhood in process
How to be heard and/or raise issues constructively

Facilitation Training for City staff and neighborhood leaders
City Staff can participate in facilitation training offered as part of regular training schedules. Project management training can also be provided for staff for larger and complex projects

Neighborhood leaders can take part in facilitator training at the GMCC's Leadership Greater Madison program, Neighborhood Roundtables and Summits. Training could also be provided to neighborhood groups (and alders) on complex projects on an as needed basis, as well.

On-going facilitation:
In the past the City had a corps of staff trained to be facilitators. They were provided with training and usually facilitated internal or external sessions related directly to their own departments. Over time, this group has dwindled because of retirements, job change and lack of interest. The narrow focus of this corps of facilitators on their individual departments was good at the departmental level, but did not always provide support for broader needs within the entire organization and community. This group could be developed again.

Alternatively, the City could create the responsibility within specific position descriptions with the requirement that facilitation support address a broad range of needs. Specific planner, economic development, community development, police and fire positions could be targeted.

Another option could be to dedicate a specific group of individuals to this role, regardless of position. Interested employees (or new hires) could be assessed for overall skills in facilitation, communication and influence and also receive additional training in facilitation and key process improvement techniques.

The City could also hire outside facilitators as needed. These facilitators would work directly with staff on various development projects or neighborhood initiatives to ensure internal coordination and overall effectiveness of the efforts.

Implementation: Ongoing, with possible future ordinance changes and budget amendments as needed.

APPENDICIES

Page

Appendix A – Recommendation Matrix for Implementation

Goal	Near Term (2011/12) Implementation	Ordinance/ Resolution Change Required	Budget Authorization Required	Other
A.1.a.	x	x	x	2011/12
A.2.a.	x			
A.2.b.	x		x	2011/12
A.3	x			
B.1	x			
B.2	x		x	
B.3	x			
B.4	x			
B.5	x			
C.1			x	Uncertain timeframe
C.2	x			
D.1	x	x		
D.2	x	x		
E.1	x	x		
E.2. a	x			2011/12
E.2. b	x			
E.2. c	x			
E.3.	x			
F.1	x			
F.2	x			
F.3	x			
F.4	x			
F.5	x			
F.6	x			
F.7. a,b,c, e	x			
F.7. d	x	x		
F.8. a	x			
F.8.b	x	x		
F.8.c	x	x		Next five years
F.8.d	x			
F.8.e	x			
F.8.f	x	x		
F.8.g		x		2011/12
F.9.a	x	x		

Goal	Near Term (2011/12) Implementation	Ordinance/ Resolution Change Required	Budget Authorization Required	Other
F.9.b	x			
G.1	x			
G.2			x	Mid-term
G.3			x	Near to mid-term
H.1	x			
H.2	x			
H.3	x			
I.1	x			2011/12
I.2	x			2011/12
I.3	x			2011/12
J.1	x		x	Near to mid-term
J.2	x		x	2011/12
J.3.a	x			2011/12
J.3.b	x			2011/12
J.3.c	x		x	2012
J.3.d	x		x	2012
J.4	x			
J.5	x			
K.1	x		x	
K.2	x		x	
K.3	x		x	Undertake with Dept website update.(L.2)
K.4	x			2011-2012
L.1			x	2012/13 coordinate with MMB redevelopment and Gov. East Block
L.2			x	2012
L.3			x	2012
M.		x	x	Ongoing, with possible future ordinance changes and budget amendments. See Prior Reports Recommendations Matrix in Appendix B.
N.		x	x	Ongoing, with possible future ordinance changes and budget amendments.

Appendix B – Prior Reports Recommendations Matrix

Recommendation	Source	Completed	In Process	Not Adopted or Begun	Included in 12/2010 Report
Create cabinet-level office of Economic Development to increase the capacity to grow.	*2004 EDC Report*	▉			
Customer service training for City staff, especially those in direct contact with businesses.	*2004 EDC Report, 2006 Planning Dept. Staff*		Natural Step		Expanded
Quality review of processes.	*2004 EDC Report*				Expanded
Establishing timeline for review and communication.	*2004 EDC Report*	▉			Expanded
Development of a customer-satisfaction feedback mechanism for businesses to provide input.	*2004 EDC Report*		Survey has been drafted.		Expanded
Commit technology and staff resources to designing and implementing a comprehensive project management and development, review, approval and implementation system.	*2004 EDC Report*		ELAM software, Development Services (DSC) Website, digitizing property files		Expanded
Creation of an ombudsman/project manager and a first point contact for businesses seeking City approvals and permits.	*2004 EDC Report, 2005 Lafollette Report, 2006 Planning Dept. Report*		Planning has been using for major complex development projects		Expanded
Undertake a total evaluation and redesign of current system of development review and approvals.	*2004 EDC Report, 2006 Planning Dept. Staff Report*		ELAM, Zoning Code Rewrite & One-Stop Shop		Expanded
Customer focus	*2004 EDC Report*				Expanded
A project management system	*2004 EDC Report, 2005 Lafollette Report*				Expanded
Single location "One-Stop-Shop" for development projects	*2004 EDC Report, 2005 Lafollette Report, 2006 Planning Dept. Report*				Expanded

Recommendation	Source	Completed	In Process	Not Adopted or Begun	Included in 12/2010 Report
Clearly defined project timelines	*2004 EDC Report*				Expanded
Universal use of Web technology	*2004 EDC Report*				Expanded
Adopt presumptive approval as a basic operating principle of the development review process. Under this standard, a project that is not approved or denied within 180 days is deemed approved unless there is a mutually agreed cause for extension.	*2004 EDC Report*				
Institute a review and restructuring of Commission's role in the development review process and of the City regulatory environment affecting business location and expansion.	*2004 EDC Report*		Zoning Code Rewrite		Expanded
Consolidate existing Commissions, such as the Urban Design and the Plan Commission, to eliminate the fragmented approach to projects, encourage whole project review, and reduce the number of reviews.	*2004 EDC Report*				
Limit public body review of routine items, e.g., conditional uses that are usually approved.	*2004 EDC Report*		Zoning Code rewrite completed for some reviews		Expanded
Clearly define the role and limits of Boards and Commissions and develop clear criteria for referral.	*2004 EDC Report*		New Urban Design Districts, more can be done		Expanded
Through the Common Council Organizational Committee or a separate rules committee, instituting a regular review of ordinances and regulations to clean out the obsolete, eliminate conflicts and inconsistencies, and revise to meet current project's approval.	*2004 EDC Report*		Zoning Code Rewrite		
Curtail or eliminate entirely the Plan Commission's and the Common Council's practice of holding project approvals "hostage" for issues unrelated to the project's approval.	*2004 EDC Report*	Improved / completed			

Recommendation	Source	Completed	In Process	Not Adopted or Begun	Included in 12/2010 Report
Do not permit new ordinances, amendments or other significant regulatory and policy changes to be introduced into the Common Council agenda by title only.	*2004 EDC Report*	Improved / completed			
Require a routine use of economic or business impact assessment for major new legislation affecting businesses.	*2004 EDC Report*			See Mayor's response memo Aug. 4, 2005	For development projects
Building on the Dept. of Planning & Community & Economic Development's "Best Practices Guide," develop a clear statement of the rights and responsibilities of all parties involved in the development review process.	*2004 EDC Report, 2006 Planning Dept. Staff Report*		DAT Meetings, Development Services Center Website, Best Practices Guide		Expanded
Use "carrots" – the methods of encouragement and rewards – rather than the sticks of legislative mandates to promote a culture supportive of business and to encourage private sector investment that exceeds basic requirements and standards.	*2004 EDC Report*				
Earlier Public Notice	*2005 Lafollette Report*		Zoning Code rewrite		
Simplified Approach for certain projects	*2006 Planning Dept. Staff Report*		Zoning Code rewrite		Expanded
Dedicated staff for ordinance update	*2005 Lafollette Report*				
Education Programs and tools	*2005 Lafollette Report*		DSC Website		Expanded
Team Involvement by reviewing agencies	*2005 Lafollette Report*		DAT Meetings		Expanded
Zoning Code Update	*2006 Planning Dept. Staff Report*		Zoning Code rewrite		

Appendix C – Previous Reports Index with hyperlinks

Document Name & Date	Description
Development Process Report 2006	Streamlining the Development review and building permit process , including a proposal to create a development review and permitting center
Mayor Memo Oct. 5, 2006	Department of Planning and Development Reorganization Report
Mayor's EDC Report Memo 8-4-2005	Memo to EDC on updates and implementation of recommendations from Opportunities to Make Madison City Government More Friendly to Business: 2004 report
La Follette Evaluation of Permitting Process	Evaluation and Analysis of Madison's Development review and Permitting Process
La Follette Appendices	Research protocols, case studies from other cities, position descriptions from other cities
Opportunities to Make Madison City Government More Friendly to Business: 2004	Also known as the "Bugher Report", recommendations; includes testimony from two business forums

Appendix D – Public Comments Index with hyperlinks

Document Name & link	Description
BOE Recommendations	May 9, 2011
Alternate Introduction	
CNI Letter to EDC	April 13, 2011
Brad Murphy Additional Comments Memo	April 8, 2011
Matrix	
Brad Murphy Zoning Code Memo	April 5, 2011
CNI Letter to PC	March 4, 2011
UDC Comments	March 16, 2011
LMC Comments	March 14, 2011
Harrington (UDC) Comments	March 16, 2011
MTHP Letter	March 11, 2011
UDC Comments	July 21, 2010
CNI Letter to Landmarks Commission	March 4, 2011
Landmarks Commission Report	March 7, 2011
CNI Letter to BOE	March 4, 2011
Ed Clarke Comments	Comments on 11/29/10 Report Draft
Economic Development Committee Minutes	See Item 5 of minutes for Development Review Report discussion
PCDevReview Comments Nov. 17, 2010	Memo to Plan Commission from Brad Murphy
Nov. 16, 2010 Neighborhood Roundtable Input	Summary of Mayor's Neighborhood Roundtable event
CNI review of EDC draft report Nov. 16, 2010	Letter from Capitol Neighborhoods, Inc. Development Review Oversight Committee

Document Name & link	Description
Neighborhood Summit: Round Two Notes	October 23, 2010 notes
Neighborhood Summit: Round Two Agenda	October 23, 2010 agenda
Ken Golden Critique	10/20/10 Handout at EDC Meeting
Fred Mohs Remarks	10/20/10 Handout at EDC Meeting
Paul Soglin Email	Sept. 23, 201 email on Landmarks Ordinance
Implementation Steps	Sept. 16 handout from Bill White Et Al
DAT Meeting #2	Notes from Sept 10, 2010 DAT Meeting
Smart Growth Greater Madison Comments	September 8, 2010 comments
City Engineering Comments	August 27, 2010 memo from Rob Phillips, City Engineer
Bert Stitt Comments	Aug. 28, 2010 email and Citizen Participation Plan from Glendale Arizona
DAT Meeting Comments	August 19, 2010 comments from DAT staff
Al Zimmerman Presentation	August 18, 2010 email and presentation to EDC
Alder Compton Comments	August 18, 2010 comments
Madison Trust for Historic Preservation	August 13, 2010 comments
RASCW Recommendations	Realtors Association of South Central Wisconsin Aug. 17, 2010
July Neighborhood Summit Summary	Official top priorities from the July 31, 2010 neighborhood summit meeting
Plan Commission Member Comments	Aug. 17, 2010
Don Severson Comments	Aug. 15, 2010
Neighborhood Summit	Invitation, pictures and flipcharts after polling from July 31, 2010 meeting
Erik Paulson Comments	Aug. 15, 2010
Marshall Swift Comments	Aug. 15, 2010
Regent Neighborhood Association Comments	Aug. 13, 2010
Alder Judy Compton Comments	Aug. 13, 2010 comments from District 16 Alder Judy Compton

Document Name & link	Description
Madison Landmarks Commission Recommendations	August 12, 2010
Sherman(School) Neighborhood Assoc. July 31 Neighborhood Summit Concerns	Aug. 10, 2010
Sherman(School) Neighborhood Assoc. Comments	Aug. 10, 2010
Greater Madison Chamber of Commerce Recommendations	Aug. 9, 2010
Madison's Central Business Improvement District's Recommendations	Aug. 9, 2010
Capitol Neighborhoods, Inc. Comments	Aug. 6, 2010
10-8-6 Memo to Alders-Input Request	Aug. 6, 2010 memo to all Alders, EDC, M. Olinger, B. Murphy, Mayor's Office asking for comments
Anita Weier comments	Aug. 6, 2010
Harrington to UDC comments	John Harrington is a member of the UDC
Fey comments for EDC	Comments from the Chairperson of the Plan Commission
Marquette Neighborhood Comments	Aug. 5, 2010
Marshall Smith Steve King comments	Aug. 3, 2010 economic development emails
Zoning Board of Appeals Area Exceptions	Chart of number of zoning variances approved, denied and no returns from 2005-2009
Dawn O'Kroley comments	Aug. 3, 2010
Greenbush Neighborhood Association Statement	July 30, 2010
Bethel Lutheran Church Statement	July 30, 2010 email
Dudgeon Monroe Neighborhood Association Statement	July 30, 2010
Northside Planning Council Recommendations	July 15, 2010
Adams Outdoor Recommendation 72210	Letter from Adams Outdoor Advertising recommending billboard policy review as part of development process review
DMI Development Approval Recommendations	Downtown Madison, Inc.'s

Document Name & link	Description
6-25-10 Final	recommendations
Bill White: Madison Development Process 6-11-10	Recommendations from ad hoc group of Madison practioneers
Cooley Memo re Input 10-6-30	City Development Review & Approval Initiative including project timeline and opportunities for public input from Tim Cooley, EDD Director

Appendix E – City Commission/Committee Comments Index with hyperlinks

Document Name & Date	Description
UDC Activity Log	Urban Design Commission Activity Log 2003-2009
Urban Design Commission Procedural Comments	Email from Rick Roll regarding UDC procedural comments
Murphy Memo to UDC Development Review Process 7-21-10	Request for Comments on City Development Review and Approval Process from Urban Design Commission
Murphy PC Memo Development ReviewProcess7-8-10	Request for Comments on City Development Review and Approval Process from Plan Commission
PC Review Standards March 2010	Standards for use in reviewing certain types of development proposals
2009 Landmarks Commission Approvals Information	Development approval information including number of cases by commission for 2009
Murphy Memo to Plan Commission, 7/22/10	Summary of Development Review Data
Completed Projects: July 2006-June 2010 Chart	Number of projects approved by Plan Commission, Urban Design Commission, staff and/or Common Council
Murphy Memo to Landmarks Commission 7-12-10	Request for Comments on City Development Review and Approval Process from Landmarks Commission

Appendix F – Existing City Materials Index with hyperlinks

Document Name & Date	Description
Participating in the Development Process	A best practices guide for developers, neighborhoods and policymakers, June 2005
Dev Review Process 07-10	Pre-application and formal application chart including timelines and informal neighborhood review process chart
Generalized Top Down Flow Chart 0001	Generalized zoning, subdivision, plan review, permitting and inspection process
Process Flow Chart 7-19-10	Detailed flow chart with pre-application, board/commission and plan sign-off/inspection stages noted
Madison Measures App. Review	Excerpt from Madison Measures 2009 Report, Planning Division mission, objectives, strategies, benchmarks and data

Appendix G – Marquette Neighborhood Project Questionnaire

Marquette Neighborhood Development Proposal

Project Questionnaire

Please supply as much information as is currently available about your development plans for the Marquette Neighborhood. We appreciate any information you have – it's not required that you fill out the survey completely before submitting it. Please submit the information as early in the development process as possible, and in advance of your meeting with the Marquette Neighborhood Association. If available, please provide any plans or drawings you may have. Feel free to attach additional information to make your current stage of thinking as clear as possible.

You may complete this form either electronically or on paper. To use the electronic form, scroll to each field using the 'Tab' key. Once you've completed the form, save it as a Word document. Submit the form via email to Johanna Coenen: elfnut@tds.net or via mail to: 1340 Spaight Street, Apt. D, Madison, WI 53703. Thank you.

I. General Information

Date of initial questionnaire: _____

Revision date(s): _____

Project name: _____

Number of parcels: _____

Number of structures: _____

General location: _____

Developer name and desired contact (email): _____

Project architect/designer: _____

Brief project description:

Desired date for submitting plans to City: _____

Desired start date: _____

Expected completion date:

Ownership type (check one): Rental   Outright Sale

                              Condominium Sale   Lease-to-own

                              Developer-Owned

II. Housing Components

Unit Mix – Market Price	No. of Units	Average SF	Average Rent/Purchase Price	Owner Occupied	Rental
Efficiency					
One Bedroom					
Two Bedroom					
Three Bedroom					
Penthouse					
Unit Mix – Inclusionary Zoning/Other Deed Restricted	No. of Units	Average SF	Average Rent/Purchase Price	Owner Occupied	Rental
Efficiency					
One Bedroom					
Two Bedroom					
Three Bedroom					
Penthouse					

Further Description of Affordability Compliance (as needed):

III. Commercial Components

Commercial square footage: _____

Type and number of commercial units:

Type:	Number:

Rental rates: _____ $/sf
Commercial condo rates: _____ $/sf
Outright sale price: _____ $/sf

IV. Other Components (Industrial or Other)

Brief description:

V. Zoning Issues

Current zoning classification: _____

Will the proposed project meet current zoning requirements? _____

Will the proposed project require a Zoning Variance? _____

Will the proposed project be a PUD? _____

Parcel Number	Parcel Depth (feet)	Parcel Width (feet)	Parcel Square Footage
1			
2			
3			
4			
5			

Setbacks: (zoning requirements / proposed)

Structure	Front Setback		Rear Setback		Side 1 Setback		Side 2 Setback	
	Req'd	Prop	Req'd	Prop	Req'd	Prop	Req'd	Prop
1								
2								
3								
4								
5								

Bulk Standards

Structure	Height	Step-back, if any
1		
2		
3		
4		
5		

Describe signage: _____

VI. Parking Issues

Street(s) from which parking Is accessed: _____

Total number of required parking stalls: _____

Number of proposed surface stalls: _____

Number of proposed underground stalls: _____

Number of proposed ramp stalls: _____

Number and location of bicycle/moped stalls: _____

Number and location of loading zones: _____

VII. Landscaping, Green Space

Landscaped area square footage: _____ Percent of lot(s): _____

Landscaped area location: _____

Describe landscaped features and general location(s):

Describe open/recreational space:

VIII. Esthetics/Historical Preservation

Describe general appearance of building(s):

Will demolition be required?

Describe demolition and reasons for it:

Describe existing structures to be preserved or reused:

Exterior materials utilized: _____

Types of doors utilized: _____

Types of windows utilized: _____

Identify exterior features: _____

Describe compliance with Third Lake Ridge Historical District requirements:

IX. Sustainability Issues

Describe recycling of material:

Describe energy efficiency of project:

Describe storm water management plan:

Describe any other "green" building practices:

X. Financing and Costs

Describe any TIF or CDBG/CDA funding you are seeking:

Will this proposal qualify for Historical Tax Credits?

XI. Alcohol Licensing

	Establishment Location	Alcohol License Required at Establishment?	What Percentage of Sales do you Anticipate Will Be Alcohol?	Hours of Operation when Alcohol will be Served
1				
2				
3				
4				

XII. Miscellaneous

Please Describe Any Other Relevant Issues:

Appendix H – Capitol Neighborhoods Inc. Project Questionnaire

Revised 3/12/06

Capitol Neighborhoods Development Proposal
Proposal Information Form

I. General Information

Initial date of questionnaire information	
Revision dates	

Proposal Name

Proposal
Address(es):

Owner's Name:

Proposal
Architect/Designer:

Number of floors &
maximum height above the
sidewalk

Brief Proposal Description:

Desired date for City submittals

Desired Start Date:

Anticipated Completion Date:

Ownership Type (check one):   Rental ☐   Outright Sale ☐   Condominium Sale ☐

What reviews or approvals
will be required? (Plan
Commission, Urban Design
Commission, Landmarks,
Council)

II. Development Team
(Please note if there is a key contact person)

Name/Role (e.g. Project Manager, Architect, etc.) and Business Address	e-mail Address		Phone #		Fax #

III. Housing Components

Unit Mix – Market Price	Number		Average SF		Average Rent/Purchase Price
Efficiency					
One Bedroom					
Two Bedroom					
Three Bedroom					
Four or More Bedroom					
Penthouse					
Unit Mix – Inclusionary Zoning/Other Deed Restricted	Number		Average SF		Average Rent/Purchase Price
Efficiency					
One Bedroom					
Two Bedroom					
Three Bedroom					
Four or More Bedroom					
Penthouse					

Rental Units

Percent of Total – Affordable (AU)	
Percent of Total Market Rate (MR)	
Number of Affordable Units	

Average monthly rent not including utilities AU	
Number of Market Rate Units	
Average monthly rent not including utilities MR	
Square Foot Size of AU as % of MR	
Annual Overall rent per square foot	

Further Description of Proposed Pricing Levels (as needed):

Further Description of Affordability Compliance (as needed):

IV. Commercial Components

Commercial Square Footage _____

Type and Number of Commercial Units:

Type:	Number:

Rental Rates: _____ $/sf

V. Other Components (Industrial or Other)
Brief Description:

VI. Zoning Issues

Current Zoning Classification:
Is the site currently a PUD?
Is the site in a Historic District?
Will the proposal meet current
zoning requirements?

Depth of Site _____ ft

Width of Site _____ ft

Lot Size: _____ total sf

Lot Size: _____ acres

Units/Acre _____

Bedrooms/Acre _____

Setbacks: (zoning requirements / proposed)

Zoning	Required	Proposed		Required	Proposed
Front Yard:		ft.	Side Yard 2:		ft.
Side Yard 1:		ft.	Rear Yard:		ft.

Signage: _____

Height of Structure:
(above sidewalk) _____

Will This Project Require a Zoning Variance?   Yes ☐   No ☐

Will This Project Be a PUD?   Yes ☐   No ☐

VII. Parking Issues

Street from Which Parking Is Accessed: _____

Number of Surface Stalls: _____

Number of Underground or Ramp Stalls: _____
Number and location of
Bicycle Stalls: _____
Number and location of
Loading Zones: _____

Please provide a site plan indicating these items

VIII. Landscaping, Green Space

Landscaped Area Square
Footage:
Area of site with a pervious surface

_____
Sf and % of site

Area of site with impervious surface

_____
Sf and % of site

Does the proposal incorporate a green roof?

Landscaped Area Location: _____

please provide a site plan

Describe Landscaped Features:

Describe Open/Recreational Space:

IX. Aesthetics/Historical Preservation
Describe General Appearance of Building(s):

Yes ☐   No ☐

Will Demolition Be Required?   Describe

Describe any proposed demolition and reasons for proposed demolition.

Will existing materials be reused?

Describe Existing Structures to Be Preserved or Reused:

Describe Exterior Features:

Exterior Materials Utilized: _____

Types of Doors Utilized: _____

Types of Windows
Utilized: _____

Identify Exterior Features: _____

Is the proposal located within a Historic District? Local _____ National Register _____

Describe Compliance with Historic District Requirements:

X. Sustainability Issues

Describe Recycling of Material:

Describe Energy Efficiency of Project:

Describe Storm Water Management Plan:

Describe Any Other "Green" Building Practices:

XI. Financing and Costs
Describe Any TIF, CDBG, CDA or other City or Public Funding Being Sought:

Will This Qualify for Historical Tax Credits?   Yes ☐   No ☐

Cost per square foot   Value per square foot

XII. Alcohol Licensing

Will An Alcohol License be Requested?   Yes ☐   No ☐

If more than one establishment in the proposal will require an
Alcohol License please indicate how many.   ☐

What Percent of Sales at the First Establishment Are
Anticipated to be Alcohol?   Percent

What Percent of Sales at the Second Establishment Are
Anticipated to be Alcohol?   Percent

XIII. Miscellaneous
Describe how this proposal addresses the Neighborhood Plan

Describe how this proposal addresses the City Comprehensive Plan for Downtown.

Please Describe Any Other Relevant Issues: