

<b>EDC Meeting 10/20/10 Excerpts</b>
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**ORGANIZATION OF GOALS & IMPLEMENTATION OPTIONS**

The report going forward is divided into four sections:

- **Pre-Application Phase**  
What happens to 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 top-level goals with specific implementation options.

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.

The overriding questions to answer when selecting and prioritizing implementation options are:

- What difference will this make?
- What will it accomplish?
- How does it address goal(s)?

The Economic Development Committee requested that staff and Committee make clear their recommended options. These have been identified in the report:

- **Bold– Recommendations of the Economic Development Committee**
- *Italics – Recommendations by Staff*
- ***Bold Italics Highlighted – Recommendations of the Economic Development Committee and Staff***

[F -2,3,4 / J-2]

## PRE-APPLICATION PHASE

### A. GOAL: Establish predictable expectations for neighborhood & staff review of development proposals

#### Implementation options

1. *Encourage first point of contact to be with DPCED staff*
  - a. Require developer/property owner to register project via web-based system
    - i. Standardized fact sheet on proposed development
    - ii. Generates notification to Alder(s), Neighborhood/Business Associations, and City staff
    - iii. Starts 30-day notification period (*only ordinance requirement*)
2. *Standardize applicant notification & neighborhood review guidelines*
  - a. Meet with Alder & Neighborhood Association president and/or design designee
  - b. Meet with Neighborhood Association (Business Association)
    - i. Allow alders to use City facilities at no cost for neighborhood meetings if a facility is not otherwise booked
    - ii. Set minimum meeting requirements for Applicant & Neighborhood Associations
      1. Provide City facilitation if needed and if Neighborhood Association agrees to guidelines
  - c. Neighborhood Association transmits official comments and/or recommendation to Planning Department to be included in City Development Transmittal package
3. *Enhance notification of projects to broader neighborhood*
  - a. Web/physical signs
  - b. Significantly increase the printing and postage budget of the Common Council Office to enable Alders to send notices to residents, business owners and property owners of their districts alerting them to projects that may be of interest.

## PRE-APPLICATION PHASE

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

#### **Implementation options**

1. *Encourage neighborhoods to have inclusive membership, governance, and development review policies and procedures*
  - a. Encourage membership to include:
    - i. Homeowners & renters
    - ii. Business owners
    - iii. Commercial & non-residential property owners
  - b. Within neighborhood association recommendation, request disclosure of voting composition and provide information regarding degree of support behind recommendation(s)
    - i. i.e. inclusion of contrary viewpoints
  - c. Work with Neighborhood Associations to post/publish meeting agendas where development projects would be considered
2. *Planning staff & Applicant work with neighborhood association*
  - a. To disseminate accurate project information
  - b. Collect feedback
  - c. Provide support at neighborhood meetings for complex project
3. *Clarify that neighborhood associations may provide advice with range of viewpoints in lieu of specific recommendation*
4. *Provide option on MyMadison to connect to all "project web pages".*
  - a. Individuals interested in a project could voluntarily sign-up to receive updates. Every time an item is added to a webpage an updated email would be sent to the subscribers.

## PRE-APPLICATION PHASE

### C. GOAL: Increase information available to property owners/investors/developers

#### Implementation Options

1. *Add within City "Property Lookup" feature*
  - a. Designations
    - i. Urban Design district
    - ii. Landmarks district
    - iii. Neighborhood/Business association (link)
    - iv. Neighborhood plans (link)
    - v. Comprehensive Plan (link)
2. *Publish development fee information*
3. *Expand utilization of Development Services Center website*
4. *Fully digitize and catalogue all property information*
5. *Continue to make owner/occupant mailing lists available for purchase*
6. *DPCED develop/maintain catalogue of all plans and studies that have a spatial impact on the City.*
  - a. The "order of control" and relationship between documents should be explained and publicized.

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## APPLICATION, REVIEW & APPROVAL PHASE

**D. GOAL:** Differentiate between development proposals that require more than internal Staff approvals

### Implementation options

1. *Within municipal ordinance, provide staff with greater discretion to make determination*
  - a. Permitted Uses vs. uses requiring Board or Commission review and approvals
2. *Complex developments to be matched with DPCED liaison*
  - a. Responsible for City staff & review facilitation with Applicant
  - b. Provides staff support in working with neighborhood associations
  - c. Follows project through to final agency sign-offs

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## APPLICATION, REVIEW & APPROVAL PHASE

### E. GOAL: Compliance with Commission/Committee conditions/recommendations

#### Implementation options

1. *Review and revise (if necessary) commission/committee mission statements*
2. *Empower professional staff to make decisions not requiring external review*
  - a. *Example: Design of Façade Grant projects should be reviewed/approved by staff*
3. *Provide significant orientation to all new Council/commission/committee/ members.*
  - a. *Develop a mentoring system whereby new members are assigned a more senior member of the commission/committee/board for guidance and mentoring during their first year.*
4. *Provide semi-annual or annual self-critique/tour of projects for Council and development review commissions/committees to jointly attend.*

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## APPLICATION, REVIEW & APPROVAL PHASE

### F. GOAL: Reduce number of development approval entities

#### Implementation options

1. *Identify & eliminate overlapping jurisdictions of Boards & Commissions*
  - a. For projects involving landmarks or projects in Historic Districts, consider review only by Landmarks Commission rather than by both Landmarks and Urban Design Commissions
    - i. Each Commission should have criteria and standards that are clear, easy to apply, and objective
2. Make Urban Design Commission an advisory committee to Plan Commission
3. Make Landmarks Commission and Urban Design Commission subcommittees of Plan Commission
4. Eliminate super majority requirement from Council action to reverse Commission decisions

#### Alternative implementation options

5. Landmark Commission maintained in current form
  - a. Continue to allow staff to approve small projects
    - i. Allows 80% of projects to be approved by staff
  - b. Require Landmark Commission to review projects before presentation to UDC
    - i. Structure Landmarks Commission Certificate of Appropriateness to allow staff review and sign-off of changes required
  - c. Amend Landmarks Ordinance
    - i. Make easier to interpret w/o diminishing effectiveness
    - ii. Provide training to staff, neighborhood associations, developers, and commission members on new ordinance
6. Urban Design Commission maintained in current form
  - a. Create sub-committee of UDC to review certain projects
    - i. i.e. variances to Sign Ordinance
  - b. Integrate UDC into Plan Commission/Common Council application & scheduling process
    - i. Provide single written staff report to UDC and Plan Commission
  - c. Update older UDC district plans to provide more specific, objective standards
  - d. Amend UDC ordinance
    - i. Formalize practice to allow staff to approve small projects and alterations to projects previously approved
  - e. Institute an expectation and practice that results in projects obtaining one "approval" or recommendation from UDC

- i. In lieu of granting "initial approval" and requiring projects to come back for "final approval".
  - 1. Add additional options
    - a. Approve development plan
    - b. Approve with recommendations
    - c. Reject development plan
- f. Consider staff administrative review/approval of all signage (both within and outside of UDC Districts).
- g. Remove requirement that Façade Improvement Grant Projects be referred to UDC unless the project is located within an Urban Design District

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## APPLICATION, REVIEW & APPROVAL PHASE

### G. GOAL: Streamline and clarify Commissions' Review of Applications

#### Implementation Options

1. *Schedule joint presentations/meetings of commissions for large projects where there is significant overlap of information required (i .e. Plan Commission and Urban Design Commission)*
  - a. Move away from the three minute speaking limit for each member of the development team before a commission to a total “not to exceed” requirement.
2. *Institute consent agendas at Commissions/Committees*
  - a. Compile and adopt “best practices” among commissions/committees
    - i. Encourage items to be put on consent agenda well in advance
3. *On referral, require specific rationale and specific items needed to satisfy the Commission.*
  - a. At the start of subsequent meeting, the Chair should review the reason for the referral.
4. *Commissions must distinguish and agree upon in writing suggestions and recommended conditions versus regulatory requirements for approval.*
5. *Provide applicants with Conditions of Approval and Plan Commission staff report one week in advance of meeting where item will be considered.*
6. *Provide an option for “Administrative Sign Approval” within older commercial areas of the City*
  - a. The applicant would have the option of complying with the underlying sign ordinance or applying for administrative sign approval if ordinance does not appropriately fit within historic or physical nature of existing building
    - i. i.e. State Street, Monroe Street, Williamson Street, etc.

## APPLICATION, REVIEW & APPROVAL PHASE

**H. GOAL: Develop clear standards of application materials and review criteria for applicant, staff and public use**

### Implementation Options

1. *Specify what type of information is required and have it presented in a clear/uniform fashion through the use of checklists, etc.*
2. *Integrate the new Electronic Land and Asset Management (ELAM) system and the Legistar system*
  - a. *Single "web presence" for individual projects.*
3. *Date and label all materials to be posted online in an understandable and easy-to-read fashion.*
4. *As identified in the 3-5 Year Strategic Economic Development Implementation Plan, develop and utilize a benefit/cost model to measure the fiscal impact of key development projects and to align TIF and other City economic development tools with the benefits received.*

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## APPLICATION, REVIEW & APPROVAL PHASE

### I. GOAL: Designate Project Staff & Project Liaison as means for efficient application review

#### Implementation Options

1. *Expand Development Assistance Team (DAT) concept to include “staff group review” of applications prior to submission to determine what remaining issues need to be addressed.*
2. *Assign staff project coordinator to all complex projects*
  - a. Guide and facilitate a project through development review.
    - i. This staff person should attend all commission meetings and fully track/interface with other City agencies, work with Alder/neighborhood associations to insure proper information sharing, and assist with reporting to various commissions and the Council.
3. *Require relevant staff from “development review departments” to attend all commission meetings where a project is under consideration*
  - a. Empower staff person to speak on behalf of his/her department

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## POST-APPROVAL PHASE

### J. GOAL: Better coordinate and expedite City agency sign-offs on approved development plans

#### Implementation Options

1. *Offer applicant a DAT–style post–approval meeting(s) with staff to discuss and clarify conditions of approval*
  - a. Distinguish between conditions of approval and City standards for all projects
    - i. Example: mapping required for City Engineering
2. Presumptive approvals for agency signoffs
  - a. Set maximum time for sign-offs
  - b. Clock resets for changes
3. *Gather applicant feedback through customer surveys, exit interviews and/or post project review meeting.*
  - a. Data , both positive and negative, to be used in updates of the “Participating in the Development Review Process” handbook
  - b. Input for continuous process improvement

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## ADMINISTRATION IMPROVEMENT

### K. Neighborhood Plans, Training & Feedback

#### Implementation options

1. *Neighborhood Plans*
  - a. Keep plans up-to-date
    - i. Revisions at minimum of every 10 years
    - ii. Standardized
    - iii. Include economic feasibility
    - iv. Reviewed by EDC/PC/LRTPC/etc.
2. *Training & continuing education*
  - a. Customer service training for City development staff
  - b. Development process/issue mandatory training for review committees/commissions, Common Council, Neighborhood/Business Associations
  - c. Provide small annual stipend to Plan, Landmarks, Urban Design and Zoning Board of Appeals commission members to off-set the cost of attending conferences or training related to their respective roles.
  - d. Increase funding for and encourage all staff involved with development review to regularly attend conferences, trade shows, training opportunities for their respective fields
3. *Feedback*
  - a. Online evaluation and feedback form
  - b. Create incentives for performance
4. *Host annual summit for architects, developers, engineers and contractors to discuss changes to City ordinances and policies and to discuss concerns/problems within the development review system*

## ADMINISTRATION IMPROVEMENT

### L. Development Guidelines, Website & Development Assistance Team

#### Implementation options

1. *Development Guidelines*
  - a. Revise customer focused print and web-based guides, manuals, and checklists
2. *Prioritize restructuring of DPCED website*
  - a. Direct link from City homepage
  - b. Identify and adopt web modules from best practice cities
  - c. Develop online development tracking and approvals
3. *Expand use and decision-making power of DAT*
  - a. Empower professional staff to make more routine decisions
4. *Review/expand use of Development Services Center website*
  - a. First implemented in 2009
5. *Formalize process to hear complaints and appeals regarding internal "administrative ruling" by City staff.*
  - a. Clearly outline and post appeal process

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## ADMINISTRATION IMPROVEMENT

### M. Physical facilities to facilitate development review process

#### Implementation options

1. *Install a permanent computer in all meeting rooms used by development review*
  - a. *MMB LL-110, 201, 260, 130*
    - i. *Computers connected to projector /LCD screen(s) within room*
    - ii. *Access to Internet, City file servers and GT Viewer.*
2. *Renovate the Council Chambers so that everyone can see presentation materials; this would likely include computers and monitors.*
3. *Develop a true one-stop permitting shop with a representative presence of all agencies involved in the development review process*

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## ADMINISTRATION IMPROVEMENT

### N. Review, Set Deadlines, & Adopt Remaining Recommendations from Previous Reports

Appendix X is a matrix of recommendations made in a number of previous reports focused on the development process and the city's competitiveness. These include:

- **2006 – Streamlining the Development Review & Building Permitting Process**
  - City of Madison Interagency Team
- **2005 – Evaluation & Analysis of Madison's Development Review & Permitting Process**
  - Robert M. LaFollette School of Public Affairs
- **2004 - Opportunities to Make Madison City Government More Friendly**
  - City of Madison Economic Development Commission

The matrix delineates specific recommendations and what stage of implementation has been accomplished to-date. Some of these previous recommendations have been integrated with this report's implementation options. *Others are part of other segments of the City's organization and development efforts and should be reaffirmed, modified, or dismissed.*