

DRAFT

Initial Draft 10-18-10



**CITY OF MADISON
ECONOMIC DEVELOPMENT COMMITTEE**

**DEVELOPMENT PROCESS IMPROVEMENT
INITIATIVE - 2010**

**FINAL REPORT
DECEMBER XX, 2010**

*"Metropolitan areas with stringent
development regulations generate less
employment growth than expected given
their industrial bases."*

Federal Reserve Board

***City of Madison
Economic Development Committee***

Douglas Nelson, Chair - M&I Bank
Joseph Boucher, Vice Chair - Neider & Boucher

Mark Clear – Council President & Alder (District 19), Madison Common Council
Chris Schmidt – Alder (District 17), Madison Common Council
Joseph Clausius – Alder (District 11), Madison Common Council

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CITY OF MADISON ECONOMIC DEVELOPMENT COMMITTEE

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MADISON, WI 53701

December XX, 2010

On June 16th, 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
- Maintains existing high standards

For the past four months, staff has solicited and compiled inputs from stakeholders in the development process in Madison. Inputs have been both written and in-person.

Additionally, previous reports related to the charge were reviewed and assessed. These included:

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

We have taken all the inputs, reviewed prior reports, and have worked with City staff that is involved on the day-to-day frontlines in moving a development from concept to completion. All has been reviewed, discussed, and compiled into the attached report outlining recommendations 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 of our city.

On behalf of the EDC, I 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 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:

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 Dev.
City Development Assistance Team
City Office of Organizational Development
Madison residents & business owners
Alderspersons

Background and written inputs received by the EDC in conjunction with this initiative can be found in the initiative's Briefing Book which is included by inference in this report. All documentation can be found on Legistar, [File #18121](#)



"FORWARD"

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“The starting point for improvement is to recognize the need.”

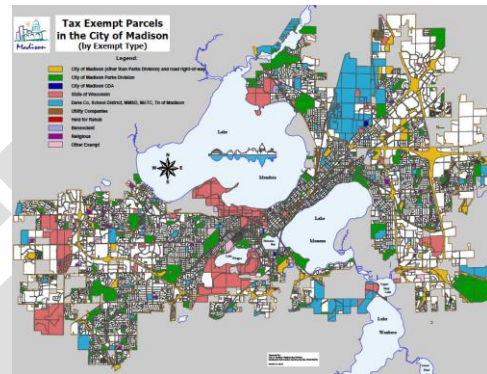
Masaaki Imai
Father of Continuous Improvement

THE CASE FOR IMPROVEMENT

Madison is competing with everywhere.

Competition for families, workforce, business and investment. Each component necessary to sustain a healthy, stable and vibrant economy and critical to fiscal sustainability.

With over 55% of its total area exempt from property taxes¹, the city of Madison must be concerned with its competitiveness and attractiveness to a wide-range of interests in order to sustain levels of service, quality of living, and standard of life for its residents.



Some rank the State of Wisconsin relatively low as an environment for business² making it all the more important to create a desirable place in Madison to invest, work and live.

Innovation in the way the City processes real estate proposals is one way to be more competitive.

Research by professors at the University of Iowa and University of North Carolina, Chapel Hill, published in The Journal of Housing Research³ states;

“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 (and end-user.)”

From an economic development perspective, a report by the Federal Reserve’s Raven Saks, a member of the FRB’s Board of Governors⁴, states;

“Metropolitan areas with stringent development regulations generate less employment growth than expected given their industrial bases.”

¹ City of Madison Economic Development Division, [Tax Exempt Parcels in the City of Madison](#)

² Refocus Wisconsin 2010, [Wisconsin: We’ve Got a Problem](#)

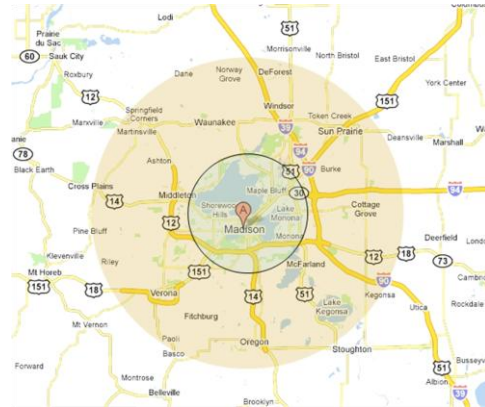
³ Xifang Xing, David J. Hartzell and David R. Godschalk, [Land Use Regulations and Housing Markets in Large Metropolitan Areas](#)

⁴ Raven E. Saks, [Job Creation and Construction: Constraints on Metropolitan Area Employment Growth](#)

It is not only the city of Madison.

Madison is the hub of an innovation region. It is the urban center, the heart of the metropolis. It is the positioning, the nationally and internationally recognized brand, and the main driver of the regional economy.

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



Because of this proximity, the city of Madison is competing with surrounding communities while at the same time cooperating in and 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 parasitic if investment, business and families choose to locate “near” Madison rather than within its municipal boundaries.⁵ Or, for those businesses or property owners that can’t relocate, experiencing difficulty competing on price, amenities, availability or suitability.

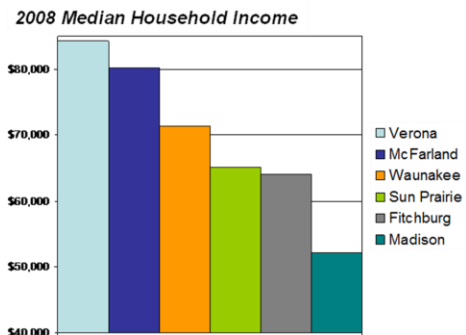
The development process involves not only commercial and institutional investment, but also encompasses residential and private infrastructure investments. For that reason, we must keep a simple truism in mind when developing land-use policy:

Innovation, talent, and investment don’t care about city limits. 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 don’t 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.

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

By far the most compelling benefit is encouraging investment in the city. With nearly 75% of the City of Madison’s total revenue coming from



⁵ City of Madison Economic Development Division, [“Economic Dashboard Report 2-26-2010”](#)

property taxes⁶, maintaining services while keeping increases in the tax levy in check, and potentially reduced, is a significant benefit.

The equation is quite simple:

$$\text{Level of services} = \text{Tax levy} \times \text{Property values}$$

The more investment in development (residential & commercial) and personal property to maintain facilities, the higher the overall property values within the city. The higher the values the greater level of services and/or the lower the taxes needed to support those services.

Public policy, in the broadest terms, can add expense to development in two ways:

- Financial – through taxes and fees
- Regulatory – through time and land use policies

Public policy can also reduce costs by eliminating barriers and streamlining process.

For the purpose of this report, the strategy for encouraging investment and development in our city is:

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 decision making.

⁶ The City's share of property taxes in 2009 was 35.5%. The remainder flows to MMSD (47.2%), the County (10.9%), MATC (6.1%), and State of WI (0.8%)

GUIDING PRINCIPALS

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 those 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. 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 determined by City ordinance can be changed by subsequent action by the Common Council⁷.

There is currently a hierarchy of 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 varying 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 is opposed by a small special-interest group of voters but may be good for the city overall. This manifests itself in dealing with proposals that vary from adopted neighborhood plans, zoning map amendments, or projects that some may simply not like based on personal preferences.

⁷ Vote of simple majority needed to change ordinances

For these reasons, this report, in part, focuses on proportionate roles and inputs for each of the stakeholders.

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 roadblocks to efficiency will surface.

Using Web 2.0 concepts⁸ of providing 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.

There are some restrictions on how the City can use tools readily available to the private-sector for project management. These have to do with record-keeping and public records statutes but other municipalities have found ways to utilize the tools available and, at the same time, comply with applicable laws.

If legal roadblocks exist, Madison should take the lead in proposing legislation that will make these tools available for its citizens and staff.

Empowerment

The right people, with authority, performing their respective roles in the development process

Representation of Interests

Who is the customer?

- **City of Madison** - Tax base / Comprehensive plan / Future residents & businesses
- **Adjacent neighborhood(s)/Residents** – Appropriateness / Compatibility
- **Property owner** - Best use / Marketability / ROI
- **End user** - Suitability

⁸ Wikipedia, "[Web 2.0](#)"

RELATIONSHIP OF NEIGHBORHOOD, COMPREHENSIVE, AND SPECIAL AREA PLANS

State statute gives land use authority within the city to the Madison Common Council, Plan Commission and Zoning Board of Appeals.⁹ The Council may also delegate certain additional powers to Commissions or Boards at its discretion.

Comprehensive Plan/Neighborhood Plans

Certain development proposals such as zoning map amendments must be consistent with the Comprehensive Plan. Neighborhood plans are supplements to the Comprehensive Plan but are not adopted as part of 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.¹⁰

Practice has been to work with neighborhoods to develop Neighborhood Plans which are then integrated into the Comprehensive Plan along with Overlay Districts (i.e. Conservation, Historic, and Urban Design Districts.)

Plans accepted and/or adopted by the City Council are advisory and subject to change and modification.

CURRENT MISSION STATEMENTS OF PLAN, URBAN DESIGN, LANDMARK COMMISSIONS AND NEIGHBORHOOD ASSOCIATIONS¹¹

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.

⁹ (Citation from MM)

¹⁰ 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.

¹¹ City of Madison, [“Boards, Commissions & Committees”](#) [“Neighborhood Associations”](#)

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. 33.01, Madison General Ordinances.

Neighborhood Associations

A Neighborhood Association is a group of residents, business representatives, and other interested citizens that devote their time and energy to improve and enhance a well-defined, geographic area that they and others live. The neighborhood association meeting, like the earlier town meetings, is a place to meet neighbors, exchange ideas, prioritize projects, propose solutions, and implement plans for the neighborhood.

DEVELOPMENT APPROVAL PROCESS FLOWCHARTS

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

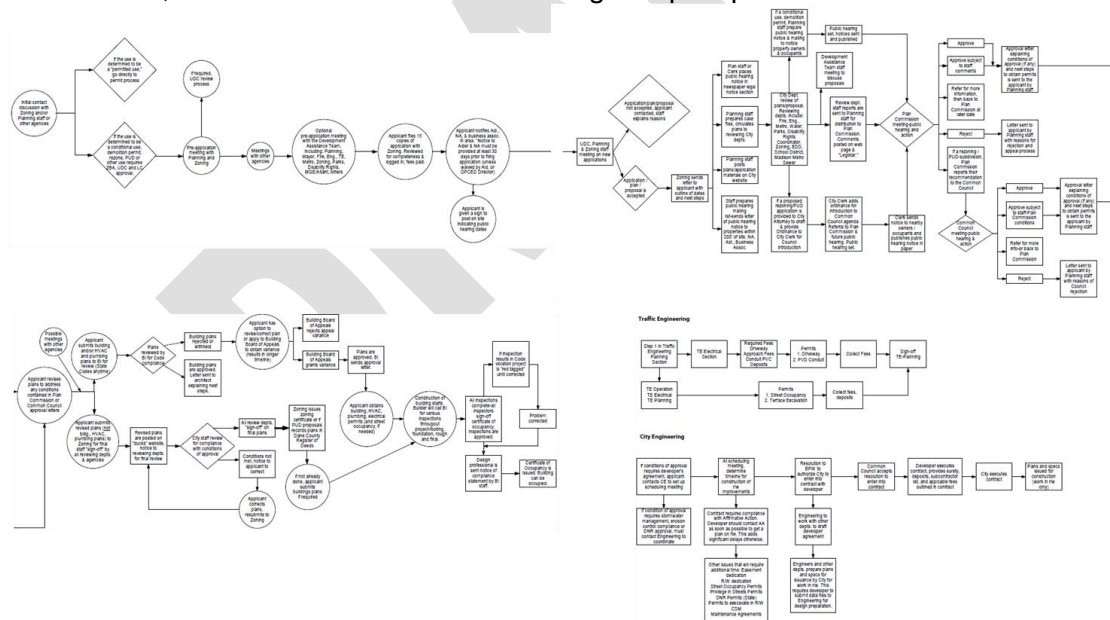
Projects that are consistent with the neighborhood and comprehensive plans, comply with all zoning requirements and do not require public-sector investment.

Complex

The flowchart for complex projects that require Board/Commission review and/or 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



For example, the current average time to move through the conditional use process is 47 days. For a zoning map amendment, it is 76 days.

¹² See Appendix for larger version

There are, of course, outliers to the average 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 routine project.

Potential delays can occur at all phases 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.

Goal

The one year goal in streamlining the approval process requires buy-in and cooperation by investor/developers/business owners, neighborhood associations, Boards & Commissions, Mayoral and Common Council support, and budget allocations.

The goal/timeline for Simple and Complex projects is diagramed below along with the average time necessary to get to completion of the permitting phase.

SIMPLE

Simplified Plan Review, Permitting & Inspection Process
Permitted Uses

Timeline = 3 to 10 business days

Pre-Application

- Project Development
- Discussion with Zoning and other agencies

Plan Signoff/Permitting

- Site plan concurrent review and sign off (multi agency)
- Building plan review (Inspection Unit)
- Fee payment
- Permits issued

Construction, Inspection

- 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

- Project Development
- Discussion with multiple agency staff and other stakeholders

Formal Application Submittal/Approval

- Board, Commission, and/or Common Council approvals
- Notices to neighbors
- Formal public hearings
- Identify conditions for approval from multiple agencies

Plan Signoff/Permitting

- Site plan sign off (multi agency)
- Building plan review (Inspection Unit)
- Fee payment
- Permits issued
- If needed
 - Draft Development Agreement for infrastructure (Engineering, Traffic Engineering)
 - BPW/CC approval plans & specs and development contract (Engineering)

Construction, Inspection

- Inspect work
- Issue orders if necessary
- Issue Certificate of Occupancy

* Variances, Landmarks COA, sign variances

** Zoning map amendments, subdivision preliminary/final plats, public improvements

ORGANIZATION OF GOALS & IMPLEMENTATION OPTIONS

The report going forward is divided into four sections:

- **Pre-Application Phase**
What happens to a proposal before an application is officially submitted to the City?
- **Application, Review & Approval Phase**
What happens once the proposal starts through the City's Staff, Commission, Board, and 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 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
- **Blue** – Recommendations by Staff
- **Bold Blue** – Recommendations by EDC and Staff

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)?

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 standard 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 digitalize 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. Permitted Uses vs. uses requiring Board or Commission review and approvals
 - a. Within municipal ordinance, provide staff with greater discretion to make determination
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 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 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

1. 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
2. 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 (State Street, Monroe Street, Williamson Street, etc).
 - 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

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

DRAFT

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
 - 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

DRAFT

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 either reaffirmed, modified, or dismissed.

APPENDICIES

- **Recommendations for immediate implementation**
- **Recommendations for implementation needing Council action**
- **Reassess & implement following completion of Zoning Code rewrite**
- **Source of recommendations**
- **Matrix of prior recommendations**
- **Matrix of impact of specific recommendations**
- **Organizational Development & Training Support**
- **Capitol Neighborhoods Inc. Development Review Questionnaire**

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APPENDIX

Organizational Development & Training Support for the Development Process Improvement Initiative.¹³

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

¹³ Provided by City of Madison Office of Organizational Development

- 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 training schedule
As needed training can also be provided for staff on big projects

Neighborhood leaders can take part in facilitator training at Greater Leadership Madison, 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.