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EDC Meeting 10/20/10 Excerpts

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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**
- *IItalics – 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.

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

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.*

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

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.*

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

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

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

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*

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.*

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
Overlay District Descriptions

APPENDIX

Organizational Development & Training Support for the Development Process Improvement Initiative.[14]

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

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[14] 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.

GRAPHICS

2008 Median Household Income

Simplified Plan Review & Inspection Process

Permitted Uses

Timeline = 3 to 10 business days

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

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 multiple agency staff and 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 (Inspection Unit) •Fee payment •Permits issued •If needed 　•Draft Development Agreement for infrastructure (Engineering & Traffic Engineering) 　•BPWCC approval plans & specs and development contract (Engineering)	•Inspect Work •Issue orders if necessary •Issue Certificate of Occupancy

*   Variances, Landmarks Certificate of Appropriateness, sign variances

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

The worse consequences are in the projects that never choose to come to Madison. There are a number of well-known, highly visible, and high-value development projects that have chosen to invest "near" Madison. A CEO of a Madison top-25 private-sector employer stated, "Madison is a great place to locate a business near."

STRENGTHS	WEAKNESSES
Innovation	Core perceived as inhospitable to business
Existing clusters	Lack of risk capital
Workforce	State business environment
Culture/Character	Lack of awareness
Quality of Life	
OPPORTUNITIES	**THREATS**
Outperform region/state/nation	Lingering recession / paralysis
Emerging clusters	Anti-growth contingent
Build awareness	Core asset values
	Status quo attitude
	Competition

50 Reasons Not To Change