Department of Planning & Community & Economic Development

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**IMPLEMENTATION PLAN for the
DEVELOPMENT PROCESS IMPROVEMENT INITIATIVE REPORT
Amended and Approved by the Common Council, June 21, 2011**

<u>OVERVIEW OF THIS REPORT</u>
This plan recommends a prioritization and general timeline for implementing the recommendations in Madison's recently approved Development Process Improvement Initiative report (the Report). It is grouped into four categories:
1. Ongoing Workstreams – these are items that require ongoing attention and management,
2. Initiatives Underway – these are items that have already been started to some degree,
3. Short-term Initiatives – these are items of a higher priority that should be undertaken in the balance of 2011 and 2012,
4. Long-term Initiatives – these are lower priority items or items that make more sense to defer until after implementation of other items.

Under each category, the items are listed largely in the order they appear in the report and do not reflect timing or prioritization. Some items are grouped in new ways. For example, there are three important workstreams involving the Landmarks Commission, the Plan Commission, and the Urban Design Commission. Each involves a number of items that need to be addressed. Staff have already begun to meet with the Landmarks Commission about items in the Report. We recommend that staff next tackle the Plan Commission and the Urban Design Commission.

There is an appendix at the end of this document listing each item appearing in the Report, assigning a specific agency and lead staff, and offering a cross-reference to explain where it appears in this plan.

1. **<u>ONGOING WORKSTREAMS</u>**

Ongoing Practices for Working with Applicants
Staff (and Alders where applicable) should take note of a number of practices identified in the report for interacting with applicants and continue to be in the habit of using practices including:
- Provide applicants with the Participating in the Development Process: A Best Practice Guide (A.3) and update the guide (see below);
- Encouraging applicants to engage with neighborhood stakeholders early (B.5).

Ongoing Practices for Working with Neighborhood Stakeholders
Staff (and Alders where applicable) should take note of the practices identified in the report for working with neighborhood stakeholders (as identified by the report) and continue to be in the habit of using practices including:
- Working with neighborhood stakeholders to notify stakeholders of projects (A.2.b)

- Encouraging representation of and input from the diverse range of neighborhood stakeholders (B.1);
- Encouraging a range of viewpoints from neighborhood stakeholders during the pre-application phase (B.3);
- Encouraging neighborhood stakeholders to utilize a variety of methods for collecting input (B.4).

Classify Projects as Simple and Complex
The City currently has a process that differentiates between "permitted uses" and those requiring review by a board or commission ("complex"). The Development Process Report calls for a review of the development process 18 months after the final adoption of the new zoning code. (D.1)

Encourage Staff and Alders to Attend Facilitation Training
Meeting facilitation training is typically offered by the Organizational Development and Program Office in two sessions in Spring and Summer. The 2012 Calendar will be available in December 2011. (B.2)

Recruit and Retain Diverse Members for Boards, Committees, and Commissions
Balance fresh perspectives with experience and strive to reflect the diversity of our community. (E.3)

Require Staff to Attend Commission Meetings when Required
The Mayor should remind managers and department heads that they must assign staff and empower them to represent their respective departments (or else attend personally) board and commission meetings where their expertise or input is required on specific development processes. (H.2)

Keep Plans Up-to-Date
Staff and Commissions should continue to update the Comprehensive Plan and Neighborhood Plans, eliminate inconsistencies where possible, and review plans for both aspirations and economic feasibility. As budget resources become available, staff should consider advancing initiatives to facilitate updating neighborhood plans more regularly. (J.1 & J.2)

Invest in Organizational Development, Orientation, and Training
The Economic Development Committee originally included this item as an appendix describing the general types of items that should be the subject of organizational development, orientation, and training. The EDC felt that it was important enough to move this item from the appendix to the body of the report to reflect the significance and encourage staff and stakeholders to look for ways to continually improve and enhance the organization's capacity through developing greater expertise and human capital. (N.)

2. **INITIATIVES UNDERWAY**

Working with the Landmarks Commission to Address Various Recommendations (Underway/Short-term)

Staff are working with the Landmarks Commission to review certain recommendations, review the Commission's adopted policies, and develop new policies, procedures, and recommendations back to staff or the Common Council as necessary. Topics to be covered include:

- Identifying areas where staff can be empowered to make administrative decisions (D.2);
- Reviewing and revising mission statement as necessary (E.1);
- Developing a mentoring program for new members (E.2.b);
- Annually reviewing projects approved by the commission (E.2.c);
- Establishing procedures for controversial cases to allow presentations by the organized opposition (F.2);
- Reviewing use of consent agenda (F.3);
- Providing specific reasons for referral and differentiating between "conditions of approval" and recommendations to the Common Council and/or applicant (F.4 & F.5);
- Maintaining Landmarks Commission and implementing the simple recommendation process (includes F.7. a through e) (F.7);
- Staff should work with Organizational Development and Training to develop training materials for Board/Commission processes (J.3.b).

3. **SHORT-TERM WORKPLAN (Initiatives for 2011-2012)**

Focus on Overhauling the Planning & Community & Economic Development Website
Many of the initiatives depend on a revised DPCED website. Staff should focus first on meeting with IT to plan and overhaul the website anticipating future desired functionality (K.2). Future functionality that should be considered in the website redesign includes:

- 30 Day web registration and notification functionality (see A.1.a);
- Linking the registration system to a notification system and/or *My Madison* (see A.2.b);
- Building a system to pilot project web pages (see below);
- Enhancing information available to guide applicants (see C.2);
- Focus on rebuilding website elements (K.2);
- Reviewing and expanding the use of the Development Services Center website (K.3);
- Clearly articulating the appeals process on the website (K.4).

Pilot Project Web Pages
As the webpage is redesigned, DPCED staff and IT should develop a method for piloting project web sites for a handful of selected projects. Pilot project sites should experiment with functionality to:

- Encourage a range of neighborhood stakeholder input in the pre-application process (B.3 & B.4)
- Review and expand the use of the Development Services Center website in conjunction with this item (K.3)

Meet with DPCED, IT, and Assessor's Office to Review Web-Based Information
DPCED Staff should convene a meeting with the Assessor's Office and IT staff to discuss implementation of the recommendation to enhance available property information. A mini-workplan for this item can then be developed. (C.1)

Convene Work Session(s) to Update the Best Practice Guide
After completion of the zoning code rewrite (and perhaps the downtown plan), staff should convene a session to update the Participating in the Development Process Best Practice Guide. This work session should include practices identified above in the Ongoing work streams section. (A.3)

Convene Work Session(s) to Review Applications and Development Guidelines
Staff should conduct a general review of all application forms and development guidelines to make updates and improvements as necessary. This effort should include a review the project transmittal cover sheet and review of timeframes for staff sign-off and related reporting. (B.3, G.1, I.2, and K.1)

Convene Work Session(s) to Develop an Intermediate Term Process for Project Liaisons & use of DAT
Staff should meet to develop protocols for the formal assignment of project liaisons and procedures for those liaisons and other staff to employ for selected priority projects to pilot the concept in the short-term. In the short-term, this process could also include scheduling a pre-application meeting for selected projects. This work session should also address enhancing or using liaisons in conjunction with the Development Assistance Team meeting and using the DAT to clarify issues in the post-approval phase. (A.2.a, H.1, H.3, & I.1)

Conduct Work Session(s) with Plan Commission to Address Various Recommendations
Staff should schedule a session with the Plan Commission to review certain recommendations, review the Commission's adopted policies, and develop new policies, procedures, and recommendations back to staff or the Common Council as necessary. Topics to cover include:
- Identifying areas where staff can be empowered to make administrative decisions (D.2);
- Reviewing and revising mission statement as necessary (E.1);
- Developing a mentoring program for new members (E.2.b);
- Annually reviewing projects approved by the commission (E.2.c);
- Discussing joint informational presentations with UDC (F.1);
- Establishing procedures for controversial cases to allow presentations by the organized opposition (F.2);
- Providing specific reasons for referral and differentiating between "conditions of approval" and recommendations to the Common Council and/or applicant (F.4 & F.5);
- Maintaining Plan Commission and implementing the simple recommendation process (F.9.a);
- Staff should work with Organizational Development and Training to develop training materials for Board/Commission processes (J.3.b).

Conduct Work Session(s) with Urban Design Commission to Address Various Recommendations
Staff should schedule a session with the Urban Design Commission to review certain recommendations, review the Commission's adopted policies, and develop new policies, procedures, and recommendations back to staff or the Common Council as necessary. Topics to cover include:
- Identifying areas where staff can be empowered to make administrative decisions (D.2);
- Reviewing and revising mission statement as necessary (E.1);
- Developing a mentoring program for new members (E.2.b);

- Annually reviewing projects approved by the commission (E.2.c);
- Discussing joint informational presentations with UDC (F.1);
- Establishing procedures for controversial cases to allow presentations by the organized opposition (F.2);
- Providing specific reasons for referral and differentiating between "conditions of approval" and recommendations to the Common Council and/or applicant (F.4 & F.5);
- Maintaining Urban Design Commission and implementing the simple recommendation process. Includes F.8. a through f, though some are long-term initiatives (F.8);
- Staff should work with Organizational Development and Training to develop training materials for Board/Commission processes (J.3.b).

Develop a Training and Orientation Program for Commissions/Committees/Boards
Staff should work together to develop a common development oriented training program on the development process as well as building specific modules for each individual board or commission. (E.2.a & J.3.b)

Meet to Develop 2012 Calendar to Facilitate Timely Provision of Staff Reports
Staff should meet to work on the 2012 Calendar to explore requirements for implementation of the recommendation to provide applicants with staff reports one week in advance of public hearings/commission meetings. Application deadlines for 2012 meetings will likely have to be moved up unless applicant does not require one week advance copy of staff reports. (F.6)

Conduct Annual Stakeholder Meetings
The Department of Planning and Community and Economic Development should take the lead in hosting annual meetings for architects, developers, engineers and a separate meeting for neighborhood stakeholders to discuss the development process. These meetings should include the Mayor and Alders as available. The annual Neighborhood Summit could potentially serve as a vehicle for one of these meetings. (J.5 & J.6);

4. **LONG-TERM WORKPLAN (Initiatives beyond 2012)**

Long-term IT functionality
Once the website is redesigned and relaunched, staff should work with IT to begin implementing:
- 30 Day web registration and notification functionality (A.1.a);
- Linking the registration system to a notification system and/or *My Madison* (A.2.b);
- Enhancing information available to guide applicants (C.2).

Integrate UDC and Plan Commission Applications
Following the adoption of the new zoning code, staff should meet to review the UDC and Plan Commission applications, identify areas of overlap and distinctiveness and develop a plan to either integrate the applications and process timelines or make a new recommendation to the DPCED Director and/or Common Council. (F.8.d)

Future Registration Ordinance

Once the web functionality for 30 day registration (A.1.a) exists, staff should advance an ordinance that requires developers to register with the city using that system and requiring them to schedule the pre-application process planning meeting unless the meeting is waived by the DPCED Director (A.2.a).

Consider Budget Allocations

As the budget allows, the Mayor and the Common Council should consider funding certain initiatives identified in the report including:

- Increasing to the Common Council postage budget to facilitate notification and project communication (A.2.b);
- A preliminary review suggests integrating ELAM and Legistar may not be feasible. This item should be considered in future budgets and as systems evolve (G.2);
- We recommend delaying investing in cost-benefit modeling tools and reconsider this item in future budgets (G.3.);
- Providing stipends for board and commission members to attend training sessions (J.3.c);
- Protect and increase staff training budgets (J.3.d);
- Implementing the Development Review and Permitting Center (as budget allows and new space is potentially occupied) (L.1);
- Renovate Common Council Chambers (L.2);
- Install computers and projectors in meeting rooms (L.3).

Review, Report On, and Revise Development Process

After implementing the priority items identified above and developing experience with a revised development process, the new zoning code, the downtown plan, and other changes, staff should review the process and develop reports to the DPCED Director, Mayor, and Common Council with additional suggestions. This review should include:

- Soliciting feedback on the revised development process through a variety of means and continue to collect feedback on an on-going basis (J.4 and I.3);
- Work with Organizational Development and Training to develop customer service training for staff across agencies and conduct on an ongoing basis (J.3.a);
- Adopting a general schedule or process for ongoing review (M.);
- Report back to Mayor and Common Council in July 2012 on status of implementation.

APPENDIX

INITIATIVE	DESCRIPTION	TIMING	LEAD AGENCY	LEAD STAFF
A.1.a	Web-based notification	Long-Term	DPCED/IT	Cover/Kronberger
A.2.a	Pre-application meeting			
	• Meet with priority projects in short-term	Short-term	DPCED	Murphy/Olver
	• Require meeting in long-term after web functionality is built	Long-Term	Common Council	
A.2.b	Enhance notification			
	• Increase Council postage budget	Long-Term	Common Council	
	• Build notification functionality into registration system	Long-Term	DPCED	Cover
	• Work with Neighborhood Associations on notification	Ongoing	Planning/Common Council	Murphy/Alders
A.3	Promote use of Best-Practice Guide	Ongoing	DPCED	Cover, Olver, Murphy
	• Update the Best-Practice Guide (after adopting zoning code & downtown plan)	Short-term	Planning/EDD	Murphy/Olver
B.1	Encourage diverse neighborhood input	Ongoing	DPCED, Common Council	DPCED managers
B.2	Staff and Alders should attend facilitation training	Ongoing	DPCED, Common Council	DPCED managers
B.3	Encourage a range of neighborhood stakeholder viewpoints			

	in Pre-Ap phase			
	• Staff should make this a practice	Ongoing	DPCED staff	Cover
	• Website should anticipate functionality	Short-term	DPCED	Cover
	• Review project transmittal cover sheet	Short-term	Planning	Firchow
B.4	Encourage neighborhood stakeholders to use a variety of means to collect input			
	• Staff should make this a practice	Ongoing	DPCED staff	DPCED managers
	• Website should anticipate functionality	Short-term	DPCED	Cover
B.5	Encourage developers to engage neighborhood stakeholders early	Ongoing	DPCED	DPCED managers
C.1.	Meet w/ Assessor/IT to discuss Property Information online	Short-term	IT/Assessor/Planning/EDD	Kronberger/Hanson/Murphy/Olver
C.2	Enhance information available online to guide applicants			
	• Website should anticipate functionality	Short-term	IT/DPCED	Kronberger/DPCED managers
	• Staff should review information after completing zoning code & downtown plan	Long-term	DPCED/IT	Cover/Murphy/Olver
D.1	Classify projects as simple and complex	Ongoing	Zoning	Tucker
	• Review 18	Long-term	Zoning	Cover/Tucker

	months following implementation of new zoning			
D.2	Identify areas to empower staff			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design Commission	Short-term	DPCED	Martin/Fruhling
	• Review w/ commissions following adoption of new zoning code	Long-term	DPCED	Cover/Murphy/Parks/ Scanlon/Fruhling/ Martin
E.1	Review and revise commission mission statements			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design Commission	Short-term	DPCED	Martin/Fruhling
E.2.a	Formal Orientation/Training Program			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design Commission	Short-term	DPCED	Martin/Fruhling
E.2.b (see J.3.b)	Develop a mentoring program for Boards/Commissions			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design	Short-term	DPCED	Martin/Fruhling

	Commission			
E.2.c	Annual review of projects by Boards/Commissions			
	• Landmarks Commission	Short-term	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design Commission	Short-term	DPCED	Martin/Fruhling
E.3	Encourage recruitment and retention of diverse committee members	Ongoing	Mayor/DPCED	All
F.1	Conduct Joint Informational briefings with Plan Commission and UDC	Short-term	Planning	Parks/Murphy
F.2	Establish procedures for even presentation time			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Short-term	DPCED	Parks
	• Urban Design Commission	Short-term	DPCED	Martin/Fruhling
F.3	Review use of consent agenda			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Completed	DPCED	Parks
	• Urban Design Commission	Completed	DPCED	Martin/Fruhling
F.4 & F.5	Provide specific reasons for referral and differentiate "conditions of approval" from recommendations			
	• Landmarks Commission	Underway	DPCED	Scanlon/Fruhling
	• Plan Commission	Underway	DPCED	Parks

	• Urban Design Commission	Underway	DPCED	Martin/Fruhling
F.6	Provide applicants with staff reports one week in advance	Short-term	DPCED	Parks/Murphy
F.7	Maintain Landmarks Commission			
F.7.a	Continue staff approval on small projects	Completed	Planning	Scanlon/Fruhling
F.7.b	Meet twice/month	Completed	Planning	Scanlon/Fruhling
F.7.c	Landmarks to proceed UDC	Short-term	Planning	Scanlon/Fruhling
F.7.d	Amend Landmarks ordinance	Short-term	Planning	Scanlon/Fruhling
F.7.e.	Review recommendation process with Landmarks	Short-term	Planning	Scanlon/Fruhling
F.8	Maintain Urban Design Commission			
F.8.a	Maintain relationship to Plan Commission	Completed	Planning	Martin/Fruhling
F.8.b	Update UDC ordinance	Long-term	Planning	Martin/Fruhling
F.8.c	Amend ordinance to allow staff approvals	Short-term	Planning	Martin/Fruhling
F.8.d	Integrate UDC and Plan Commission application	Long-term	DPCED	Cover/Murphy/Olver
F.8.e	Review recommendation process with UDC	Short-term	Planning	Martin/Fruhling
F.8.f	Identify signage projects to allow staff approvals	Long-term	Planning	Martin/Fruhling
F.9.a	Review recommendation process with Plan Commission	Short-term	Planning	Parks
G.1/K.1	Review/update all applications forms	Short-term	DPCED	Cover/Murphy/Olver/ Tucker
G.2	Integrate ELAM with Legistar	Long-term	DPCED	Cover
G.3	Invest in cost-benefit tools	Long-term	DPCED	Olver
H.1	Assign project liaisons	Short-term	DPCED	Cover/Murphy

	to complex projects			
H.2	Require staff to attend commission meetings	Ongoing	Mayor	Soglin
H.3	Expand use of DAT	Short-term	DPCED	Cover/Parks
I.1	Use DAT in post-approval process	Short-term	DPCED	Cover/Parks
I.2	Establish timelines for staff reviews	Short-term	DPCED	Cover
I.3/J.4	Gather feedback from stakeholders	Long-term (ongoing)	DPCED	Cover
J.1	Keep Plans Up-to-Date	Ongoing	DPCED	Cover/Murphy
J.2	Neighborhood plans should reflect neighborhood input and economic feasibility	Ongoing	DPCED	Murphy/Olver
J.3	Neighborhood plans, training, and feedback			
J.3.a	Customer service training for staff	Long-term	OTD	Van Lith/Cover/Soglin
J.3.b (see E.2.a)	Develop training materials	Short-term	DPCED	Cover/Murphy/Parks/ Scanlon/Fruhling/ Martin/Olver
J.3.c	Stipend for training for commission members	Long-Term	DPCED	Cover
J.3.d	Protect and increase staff training budget	Long-Term	DPCED	Cover
J.4 (see I.3)	Gather feedback and protocols	Long-term (ongoing)	DPCED	Cover
J.5	Applicant/Developer annual meeting	Short-term	DPCED	Cover w/ Soglin
J.6	Neighborhood Stakeholder annual meeting	Short-term	DPCED	Cover w/ Soglin
K.1 (see G.1)	Update development guidelines	Short-term	DPCED	Cover/Murphy/Olver/ Tucker
K.2	Prioritize restructuring of DPCED website	Short-term	DPCED	Cover
K.3	Review and expand use of Development Services Center website	Short-term	DPCED	Cover
K.4	Establish and articulate appeal process	Short-term	DPCED	Cover
L.1	Implementing the	Underway	DPCED	Cover

	Development Review and Permitting Center			
L.2	Renovate Common Council Chambers	Long-term	Facilities	Hoffman/Satterfield
L.3	Install computers and projectors in meeting rooms	Long-Term	Facilities	Hoffman/Kronberger
M.	Review development process on regular basis	Ongoing	DPCED	Murphy/Olver
N.	Invest in organizational development, orientation, and training	Ongoing	DPCED/ODT	Cover/Van Lith