

WS
4-23-02

**CITY COUNCIL WORK SESSION
ON THE CITY'S
DEVELOPMENT REVIEW PROCESS**

**TUESDAY, APRIL 23, 2002
6:00 P.M.
COUNCIL WORKROOM**

AGENDA

- I. OVERVIEW
 - Purpose of Development Process Study
 - Interviews
- II. ISSUES
 - Issues identified by the development community
 - Issues identified by citizens
- III. PROPOSED CHANGES TO THE PROCESS
- IV. NEXT STEPS
- V. CITY COUNCIL DISCUSSION

Individuals with disabilities who require assistance or special arrangements to participate in the City Council Work Session may call the City Clerk and Clerk of Council's Office at (703) 838-4500 (TTY/TDD (703) 838-5056). We request that you provide a 48-hour notice so that the proper arrangements may be made.

City of Alexandria, Virginia

MEMORANDUM

WS
4-23-02

DATE: APRIL 18, 2002
TO: THE HONORABLE MAYOR AND MEMBERS OF CITY COUNCIL
THROUGH: PHILIP SUNDERLAND, CITY MANAGER *PS*
FROM: EILEEN FOGARTY, DIRECTOR, PLANNING AND ZONING *Eileen Fogarty*
SUBJECT: DEVELOPMENT PROCESS REPORT

On April 23, we will have a work session on the changes that are being made to the City's development review process. The attached report describes these changes. It also provides a comprehensive review of the City's existing development review process and policies and points out why changes are needed to that process. It is the result of a almost a year's effort, with outside consultants, to evaluate the development process and make recommendations to improve it. The development of this report and the implementation of an improved development review process were priority recommendations of the *Plan for Planning*.

This purpose of the study was to identify improvements to the process that would facilitate high-quality development consistent with the goals and standards of the City and community, while responding to the development community's desire for a more efficient, streamlined process and citizens' desire for greater participation early on in the process. The study's recommendations are based on the recognition of the mutual interdependence of the City's residential and commercial communities in ensuring a healthy and expanding local economy which enhances the local quality of life. Thus, the study seeks to design a process which provides for consensus, clarity and certainty. It also addresses the issue of staff resources, interdepartmental coordination, and citizen participation.

In order to ensure that all perspectives were incorporated, a wide-ranging outreach process was carried out at the beginning of this study. Background information was gathered through a series of interviews with individuals involved in every aspect of the development process, including City staff, City officials, engineers, builders, developers, attorneys, and representatives from the Alexandria Chamber of Commerce and from citizen groups.

Since the initial meetings, we have met again with these same groups to discuss and obtain their feedback on the draft study and its recommendations. We have also discussed the study recommendations with the Planning Commission. The response has been positive.

The following are among the principle study recommendations:

- Implement a greater team-oriented approach to development review, with a staff team leader and formalized interagency meetings to discuss issues at each stage of the development review process;
- Reduce the length of the development review process, especially the back end of the process, through early staff review, concurrent processing, clear procedures, and pre-release of certain plan elements;
- Provide additional opportunities for citizen participation throughout the development review process, including more formalized citizen participation prior to submission of formal applications and later when applications are under review by City staff;
- Prepare a manual of development standards incorporating the requirements of all City agencies;
- Provide easier access to information about the development process and the status of specific development proposals.

The Planning and Zoning Department has already begun to implement the procedural changes recommended by the report. We are pleased with the early results of such changes and look forward to further improvements in the development process in the coming months.

Attachment

City of Alexandria, Virginia
Development Review Process and
Policies

Analysis and Recommendations

Final Draft
January 22, 2002

The Phipps Group

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EXECUTIVE SUMMARY

Overview:

The City of Alexandria has undertaken a more active role in defining and shaping its future. In doing so, it has identified a series of steps designed to ensure that future development and redevelopment reflect community goals and values and advance a vision of the City for the future. As a first step in this process, in June, 2001, the City endorsed a comprehensive planning and development approach embodied in the *Plan for Planning*. The major recommendations of this document highlighted the need to develop a set of shared expectations as a vision for the future; the importance of involving the residential and development communities in a constructive dialogue leading to consensus; and the requirement to provide certainty and clarity in the development process.

To implement these goals, and responding to extraordinary development pressure, the City is moving forward on several levels. While initiating several specific geographic planning efforts with extensive community outreach, the Department of Planning and Zoning has also carried out a detailed review of the current development review process. This report incorporates the findings and recommendations of that review. Because of the urgency of this issue, the Department has begun implementing some of the report's major recommendations, modifying some of its internal review procedures in order to ensure that new development proposals respond to the policy directives of the *Plan for Planning*.

In essence, the sum of the recommendations in this report is expressed in five major objectives;

- to develop an efficient, clear and timely process in which written policy direction is provided at an early stage,
- to provide guidelines and standards upfront thus reducing the need for later revisions and/or unintended consequences for the public,
- to establish an internal coordination procedure which requires principal agency reviewers to meet and provide written comment within a time certain, thus reducing uncertainty and eliminating sequential redundancy,
- to provide for public input at the point where the development application both meets the basic development criteria and provides enough information for public assessment, and
- to streamline the process, once the applicant has received approval, so applicants have greater flexibility at the back end.

Purpose:

The purpose of this study is to provide a comprehensive evaluation of the City's existing development review process and policies. Its goal is to identify improvements to the process that will allow the City to pro-actively promote high-quality development and economic development consistent with the goals and standards of the City and community, while responding to the development community's desire for a streamlined process.

The need for this study arose from the requests of the residential, development and business communities for a process which was efficient, open, and guided by standards. It's recommendations are based on the recognition of the mutual interdependence of the City's residential and commercial communities in ensuring a healthy and expanding local economy which enhances the local quality of life. Thus, the study seeks to design a process which provides for compromise and consensus, clarity and certainty. It also addresses the issue of staff resources and interdepartmental coordination, citizen participation and involvement.

Methodology:

The study evaluated the primary development processes--the development site plan (DSP) and development special use permit (DSUP)--through every stage of approval including pre-application, completeness review, preliminary review, final review and building permits.

In order to ensure that all perspectives were incorporated, a wide-ranging outreach process was carried out at the beginning of this analysis. Background information was gathered through a series of interviews with individuals involved in every aspect of the development process, including: City staff; City officials; engineers, builders, developers, attorneys, and representatives from the Alexandria Chamber of Commerce and citizen groups and their representatives.

These numerous interviews identified a number of issues with the process, but also made apparent that the basic framework of the existing development review provides a solid foundation for the new recommendations included in this report. The interviews also made clear that recent changes to these procedures already implemented by the Department of Planning and Zoning to the development process were viewed as the beginning of major improvements to come by both the residential and development communities. Specifically identified as initial improvements were: the increased and early emphasis on conceptual review; the expanded community outreach to citizen groups during the process; and, the initiatives to enhance interagency coordination. All agree that additional progress is required in each of these areas. Thus, while several of the recommendations in the following pages have already been introduced into the development review process, it is clear that for any of these recommendations to make a significant difference, the entire package of recommendations must be implemented. The following pages provide the integrated and interrelated components of a comprehensively revised development review process.

In the interviews, the concerns identified by the various stakeholders in the development process were based on the historical problems and presented from a variety of perspectives. For example, the development community insisted that the entire development process--from initial site plan application to building permit--takes too long. Their principal request was for a more streamlined procedure as well as assistance for small businesses trying to navigate the process. Development applicants also indicated the need for more certainty about the City's processes and standards. They also identified a need for a distinction between large-scale and smaller development applications. Citizens say that the process is too rushed, and are concerned that adequate notice is not given of development proposals. They were particularly concerned that adequate opportunities do not exist within the process for them to influence the type, scale and character of development. City Council and Planning Commission find themselves faced at public hearings by citizens saying that they have not had a chance for their voices to be heard.

The City staff involved in development review expressed a wide range of concerns. Most critically, staff expressed a need for additional review time at the beginning of the process so they could respond more effectively to development requests, coordinate issues with the community, and reduce processing time later in the review process. Staff identified a number of cumbersome provisions within the City's regulations that they felt provided little benefit to the City and community or to the applicant. Staff also acknowledged the need for improved coordination of development review and for more clearly defined and documented procedures and standards.

Priority Recommendations:

To address these issues, accommodate the volume of development applications, and reinforce recent improvements to the process by the Planning and Zoning Department, this study is recommending the following changes and refinements to the current development review process. The following is an overview of the principal recommendations of the study:

Structural Changes to Review Procedures.

- Provide adequate time for City staff review earlier in the process through conceptual review/pre-application meetings,
- Increase concurrent processing,
- Formalize pre-release of plan elements such as grading plans, infrastructure plans and utility plans

Improvements to Internal Coordination.

- Implement a more team-oriented approach to development review, with formalized interagency meetings to discuss issues at each stage of the development review process,
 - Institute a committee composed of senior representatives of the various Departments, called the *Development Overview Committee*, to ensure interdepartmental cooperation in the development process,

- For development projects, designate members of a project-specific *Development Review Team* from the various Departments, under the direction of the *Development Project Leader*, to monitor and coordinate progress of a specific development application as it goes through the process.
- Planning and Zoning to identify a specific planner as the *Development Project Leader* for each development project to lead the *Development Review Team* and act as the point of contact for the applicant and the public on each development application.

Improvements to Citizen Participation.

- Provide additional opportunities for citizen participation throughout the development review process, including more formalized citizen participation prior to submission of formal applications and later when the application is under review by City staff,
- Provide easier access to information about development proposals through the *Development Project Leader* and through development guides to the process.

Document Standards, Guidelines and Development Procedures.

- Provide a manual of development standards incorporating requirements from all City agencies, including public facilities, private streets, zoning criteria, fire code, archeology and tree preservation,
- Provide documentation for the development review process which clearly lays out the steps in the process, the procedural requirements for each step, and the specific responsibilities of each agency involved in development review.
- Provide a point of contact for small business assistance as they work through the process.

The more specific recommendations of the study are based upon these principal recommendations.

The issue of timing is a central factor for each constituent group - staff, applicant, and citizen. The recommendations which follow attempt to balance the needs of the development community for certainty and clarity at the front end with citizen concerns for opportunity to comment early-on, and staff requirements for review time. In attempting to achieve this balance, this report recommends that the expanded time spent in concept review/pre-application and citizen comment on the front end of the application process be offset with expedited procedures at the back-end. It is anticipated that this trade-off should result not only in more easily approvable, quality applications but should also eliminate delays that now typically occur in later stages of the current process. To this end, recommendations are also included to increase concurrent processing and pre-release of plan elements to further expedite the final stages of the development review process.

Of critical importance to a successful development review process is improved staff coordination. The goal of these recommendations is for the process to appear seamless to the applicant. To accomplish this goal, this report recommends that the Department of Planning and Zoning lead a team-oriented approach to development review, with formalized interagency meetings to discuss issues at each stage of the development review process, and follow a clearly established schedule of review. This team approach paired with clearly defined development standards will serve to reduce both the applicant's current confusion over development requirements and the time necessary to reconcile conflicting agency interpretations.

The cumulative effect of all of this report's recommendations will be to reduce the overall time for processing of development applications.

The recommendations of the study address specific policy, procedural and legal land-use and development issues. As with many complex problems, it will take time for the stakeholders in the review process to become familiar with the new policies and standards and establish a working relationship within the process. To accomplish this, it is essential that the Planning & Zoning Department provide an outreach plan and guide on the revised development review process and standards for the development community and the general public.

I. INTRODUCTION

A. Purpose of the Study

The purpose of the study is to provide a comprehensive evaluation of the City's existing development review process and policies in order to identify improvements that will provide a more clearly defined collaborative review process among City staff, developers and the general public. The revised process will enable the City to promote high quality development and economic development consistent with the overall goals for the City, while ensuring compatibility with the diverse character of existing neighborhoods.

B. Methodology and Scope of the Study

The study evaluated the primary development processes that include development site plan (DSP), development special use permit (DSUP), subdivisions and building permits. While the study does not specifically evaluate other planning processes (Special Use Permit, Vacations, Encroachments, Board of Zoning Appeals and Board of Architectural Review) the overall framework and policies proposed discussed below will accommodate these applications. However, a more detailed analysis of the other processes will be required before more specific recommendations can be provided. In addition, a separate evaluation of the fee schedule for planning applications is currently is being conducted.

Planning and Zoning, Transportation and Environmental Services, and Code Enforcement Directors and staff were interviewed and provided background information for this study. Additionally, interviews about the development process were held with elected and appointed officials: Mayor Kerry Donley; Planning Commission Chair Eric Wagner; City Manager Phil Sunderland; Fire Chief Tom Hawkins; and City Attorney Ignacio Pessoa. Specific interviews were conducted with citizen representatives, private engineers, builders and developers, attorneys, and the Alexandria Chamber of Commerce. All those interviewed provided valuable background information that forms the basis for the principal findings and recommendations of the study.

C. Background

Many of those interviewed agree that the development review process has been improved during the past several months by addressing and - in many instances resolving - issues earlier in the review process. However, all the stakeholders interviewed also agree that additional improvements are necessary. The development community is requesting a shortened review process, better coordination between City departments and more clearly defined development standards. The citizens and citizen organizations are requesting additional time for review and opportunities for review earlier in the process. The City staff stressed the need for more review earlier in the process, and acknowledged the need for improved outreach to the community, better staff coordination and more formalized standards and procedures.

The sum of the current process is the unanticipated consequence of a variety of historical factors that have occurred over the years. This study was designed to address this challenge. It undertakes a review of current development procedures with the goal of changing the City's manner of dealing with land use development from an essentially reactive mode to one which is considerably more "proactive" and consistent with an established community vision.

D. Organization of the Report

The body of this report is divided into three principal sections:

- The Development Review Process
- Citizen Participation, and
- Staff Coordination.

Each section includes a description of current practices, lists the issues identified by the various stakeholders interviewed for this report and presents recommendations to address these issues.

II. THE DEVELOPMENT REVIEW PROCESS

A. The Pre-Application Process: Well Defined, Systematic Process Recommended

In 1992, a pre-application process was introduced into the City's development review process with the adoption of the Zoning Ordinance. This site plan pre-application review process is defined in Section 11-407(A) of the Zoning Ordinance. The existing ordinance requires that certain applicants meet with the city 45 to 90 days before filing an application, depending on the type and size of the proposed development. According to the ordinance a pre-application conference is to be held in the "conceptual phase of project planning" before the site plan application is prepared. The purpose of the concept meeting is to discuss fundamental development concepts and resolve significant issues prior to an applicant preparing detailed site plans for a project.

It is the recommendation of this report that the Department of Planning and Zoning implement the requirements for pre-application in a well-defined systematic process. Both the City and the applicants should benefit from a well designed and properly implemented two-tier, sequential pre-application stage, consisting of:

- "conceptual phase project review" dealing with basic planning and zoning issues such as land use, zoning, massing, height, scale and design; and,
- formal pre-application procedures dealing with specific site design issues affecting all Departments.

This approach should benefit the City by resulting in development proposals more responsive to the City's goals and standards. It should also benefit the applicant by resulting in quicker processing through latter phases of review and by reducing costs associated with revising site plans for re-submission.

Over the past year, the Planning and Zoning staff have begun encouraging participation in this two-tier approach for large projects that the staff has titled "Concept Review" which occurs very early in the process while the project is still fluid with little distinct definition. The purpose of the Concept Review meeting is for Planning and Zoning to discuss with applicants fundamental planning concepts such as proposed land-use, scale, height, massing and density and urban design. The meeting – or series of meetings - allows staff the opportunity to review City policies, plans and regulations and assist the applicant in meeting their needs prior to the applicant expending significant resources on the development of a formal preliminary

submission which then goes to all relevant agencies. There is agreement that the use of a conceptual review process in a number of projects over the past year has improved the quality and character of the development proposals that have been formally submitted.

Issues Pertaining to a Pre-Application Process:

- Staff notes that the existing pre-application requirement in the Zoning Ordinance does not cover many of the types of applications for which a pre-application process would be helpful. Typically, agencies meet separately with the applicant and little interagency coordination ensues. Thus, by the time the applicant believes himself ready to proceed with formal pre-application, it occurs that several of the major issues pertaining to the project remain unresolved.
- Staff believes that while not every development application or site plan is of a size or complexity that merits a requirement for conceptual review, many projects would benefit from an early concept review between the applicant and planning staff, so that significant site plan issues can be identified and addressed prior to formal submission.
- The development community has expressed concerns that conceptual review will add to the overall length of the development review process and have stressed the importance of timely reviews and responses during any conceptual review.
- The development community has also expressed concerns about City Departments changing comments during the conceptual review and subsequent development review processes or different Departments providing comments that are in conflict.
- Representatives of citizen groups have expressed a desire for notice of development applications during the pre-application phase of development, so that their issues and concerns can also be addressed prior to formal submission. They also wished to be assured of continuing participation throughout the review and approval stages.

Recommendation Objectives Pertaining to Issues of the Pre-Application Process:

I. **Refine Concept Review Procedures:**

The “Conceptual Review” process that Planning and Zoning has begun utilizing over the past year has already demonstrated that the concept review process is a critical first step in the development process. It allows the City to ensure that its basic planning and zoning policies regarding land use, zoning, building footprint, height, density, massing, scale, site footprint and mapping are met before the applicant prepares a specific site design for pre-application.

It is therefore recommended that the Zoning Ordinance’s existing requirement for a pre-application process be modified to reflect a two-tiered process:

- 1) "Concept Review" stage for large or particularly complex projects [see definition, p.7] in which the applicant meets at least 90 days in advance of formal submission where broad-based planning and zoning issues are assessed, and
- 2) a "Pre-Application Conference" for all projects at least 30 days in advance of formal submission.

These deadlines are suggested as a means of allowing time for the applicant and the City to resolve major issues, and may be extended by the City should additional time be deemed appropriate.

II. Staff Coordination

Designate Development Project Leader:

In their role as coordinators of the development process, Planning and Zoning staff shall continue to coordinate these concept review/pre-application meetings, scheduling meetings with staff from Transportation and Environmental Services, Code Enforcement, Parks and Recreation and other agencies where appropriate.

- A specific planner should be assigned to each project and identified to the applicant and to other agency representatives at this stage of review.
- This planner will serve as the City's *Development Project Leader* for the project and should be the point of contact for the City with the applicant on all issues. In order to improve interagency coordination, any separate meetings between the applicant and other agencies which may occur should be scheduled through the *Development Project Leader*. In addition, all internal City comments should be directed through the *Development Project Leader* and delivered to the applicant.

To assure better interagency coordination on issues throughout the entire development review process, it is critical that interagency coordination be improved commencing with this first stage of the development process.

Establish Development Review Team:

For each specific major project, all relevant City Department's shall appoint a specific staff person to represent that Department's policies and participate in specific project review throughout the process. The *Development Review Team* will include representatives from all Departments that will be reviewing the application and will be coordinated by the *Development Project Leader*. A more detailed discussion of the *Development Review Team* is found on pages 36-7.

This *Development Review Team* is an interagency coordinating team which is project-specific. It will go out of existence when the process for the specific project is completed. It's function is to review, analyze and discuss a particular application from a city-wide perspective.

III. Implement Specific Development Procedures:

To address the development community's concerns about adding to the length of the development, it is recommended that specific procedures be implemented to assure the City's timely review and response to concept meetings. It is recommended that:

- To further facilitate timely review, applicants should provide project specifications such as building footprint, area by land use, height, density (F.A.R), massing, scale and zoning compliance to Planning and Zoning staff in advance of concept review and pre-application meetings.
- Planning and Zoning should provide meeting summaries of all concept and pre-application meetings and comments to applicants after pre-application meetings within established time-frames.

IV. Schedule Public Briefings:

To address the public's desire for notice of development projects during the pre-application phase of development, it is recommended that Planning and Zoning schedule a public information meeting for each major project after the staff determines that the project meets minimum legal requirements, but prior to the time an application is formally submitted for Preliminary Development Review. This meeting is defined in more detail in the section in this report on Citizen Participation.

V. Provide Small Business Assistance:

To address the business community's concerns about the difficult facing small businesses who wish to navigate the development process, it is recommended that Planning and Zoning provide a development guide and identify a point of contact to assist small business applicants throughout their development review, commencing at the earliest stages of review (concept and pre-application review).

Implementing Recommendations : Pre-Application Process

1. **Replace the current zoning ordinance pre-application requirements with a two-tiered conceptual review and pre-application process.**
2. **All projects with any of the following characteristics shall attend a Conceptual Review meeting, or meetings, with Planning and Zoning at least 90 days prior to formal submission of an application:**
 - **within a Coordinated Development District,**

- requiring a master plan amendment or rezoning
 - requiring a special use permit for an increase in Floor Area Ratio, density or height,
 - requiring a transportation management plan Special Use Permit,
 - proposing a parking or open space reduction,
 - located within an historic district, or
 - located on environmentally sensitive lands, including sites with Resource Protection Areas, wooded sites, or steeply sloped sites.
3. All applicants for all other projects seeking approval shall attend a Pre-Application Conference with Planning and Zoning and the *Development Review Team* at least 30 days prior to formal submission of an application.
 4. To maintain flexibility in the process, the Director of Planning and Zoning shall be authorized to waive the concept review/pre-application requirement for projects that the Director determines to be insignificant with respect to their impacts or where no benefit accrues to the City from the established time limits.
 5. A planner shall be assigned as the *Development Project Leader* for each project no later than the first Concept Review or Pre-Application meeting and shall attend all Concept Review/Pre-application Meetings for a project.
 6. A project-specific *Development Review Team*, composed of representatives of Planning & Zoning, Transportation and Environmental Services, Code/Fire, and other departments as necessary, shall be identified for each development project.
 7. Applicants shall provide materials for review in advance of concept and pre-application meetings.
 8. Planning and Zoning shall provide minutes of Concept Review and Pre-Application meetings to all meeting attendees within two weeks of such meetings.
 9. Planning and Zoning shall provide written comments on materials presented at each Concept Review and Pre-Application meetings within three weeks of such meetings.
 10. The *Development Project Leader* shall be solely responsible for coordinating any separate meetings between the applicant and other agencies which may occur.
 11. Planning and Zoning shall hold a meeting with affected citizens and community groups for each major project during the Pre-Application stage.
 12. Planning and Zoning shall appoint a point of contact to assist small business applicants throughout the development process.

B. Preliminary Development Applications

The City's Zoning Ordinance establishes two steps in the preliminary plan review process:

- Completeness Review, and
- Preliminary Review.

Historically, applicants have submitted development applications to Planning and Zoning for completeness and preliminary review pursuant to a schedule published by the City, with the public hearing for an application then established by a set date, typically two to three months from the filing deadline.

Completeness Review:

The purpose of the Completeness Review is to identify the information or materials lacking or necessary to the review of the application, rather than to identify substantive issues with the proposed development. For this review, Planning and Zoning staff sends all applications to a core group of review agencies (typically Transportation and Environmental Services, Code Enforcement, Parks and Recreation & CA and Archeology). These agencies review the application to determine if the application is complete according to their agency requirements. Planning and Zoning staff then compiles the comments and sends them to the applicant within 15 days of submission.

Preliminary Review:

Once an application is deemed to be complete, the Preliminary Review process begins. Planning and Zoning circulates the complete plans to review agencies throughout the City, and in some cases, to outside agencies or applicable review boards. Typically, agencies are given three weeks to conduct their full review and provide written comments to Planning and Zoning. The Planning and Zoning coordinator compiles the comments, prepares planning staff comments, attempts to reconcile any conflicts or inconsistencies among the comments of the various agencies and then prepares a staff report, with the staff recommendations, for the Planning Commission and City Council.

Site Plan Coordinating Committee:

There is one additional step required by the Zoning Ordinance during the preliminary review phase specifically for development site plans (not for development special use permits). A Site Plan Coordinating Committee (SPCC) meeting is to be held. This meeting, where staff meets with the applicant and provides staff comments, is required to be held prior to the Planning Commission public hearing. The meeting is open to the public and is intended to provide the public an opportunity, other than at the Planning Commission public hearing, to hear about the proposed project and the issues.

Issues Pertaining to Preliminary Development Applications:

- Most of those interviewed agree that, historically, the completeness and preliminary review portions of the existing review process has not worked well.
- Staff expressed concerns about the lack of time to resolve issues.
- Planning and Zoning staff noted the difficulty in getting and coordinating other agency comments under the prescribed deadlines.
- Staff expressed concerns about multiple revisions to plans being submitted during preliminary review, each version requiring new review.
- Agencies other than Planning and Zoning expressed concern about insufficient time to review final recommendations or reports.
- The development community expressed concerns about the rigidity of the process, and that adjustments to plans, even in response to staff issues, caused significant delays in processing.
- The development community expressed a desire to receive conditions prior to the publication of staff reports
- The development community indicated staff comments are sometimes unclear or too general, based upon a template rather than a specific response to the particular proposal; comments from different City Departments are also sometimes internally inconsistent and/or in conflict.
- Citizens don't believe that they have an enough time or opportunity to comment on applications, often resulting in adversarial situations among citizens, developers, and the City at public hearings.
- **Central Issue with Current Preliminary Development Process:**

In part, the completeness/preliminary review process has not worked well because there has not been an opportunity for an exchange of information with developers before a formal application is filed. This lack of a conceptual review process, in combination with the use of filing deadlines and a "clock" to process development applications places City staff at a great disadvantage. The current process does not enable City staff to use a more proactive approach to resolve issues. Rather, staff spends time ensuring that applications comply with deadline requirements. Frequently staff does not have time to adequately resolve issues with the applicant. As a result, the processing of plans after formal submission is often held up to resolve these issues and results in requiring

additional adjustments to the formal submission. Staff is often forced to add a large number of review conditions to applications sent to the Planning Commission and City Council, which leave substantial decisions to the discretion of staff during final site plan review. Since not all of the details of the recommendations are able to be worked out prior to a public hearing, inevitable delays result during the final review process as the issues are finally fully addressed and resolved. Due to this, plans may change in the final review stages in ways that are not expected by the community.

- **The Issue of Timing:**

Filing deadlines, historically used by Planning and Zoning, promise applicants that their application will be heard by a certain deadline, regardless of the complexity of the application, and regardless of whether or not they have worked with staff prior to submission to resolve issues. In reality, the City actually has great flexibility in processing most development applications. The exception to this is an application for subdivision, which by State statute must be docketed within 60 days, and by City Charter docketed within 45 days. Other than for subdivision applications, there are no State statutes requiring that development site plans or special use permits be processed within a certain time period. The Zoning Ordinance has only a single time limit related to development plans, a requirement that site plans (without special use permits) be docketed within 90 days.

- **Concurrent Review of Development Applications and Board of Architectural Review:** This report focuses on the primary development review cases, the Development Site Plan (DSP) and the Development Special Use Permit (DSUP). For cases within the City's historic districts there is a parallel review process for these cases for the Board of Architectural Review (BAR). Historically, these cases had been processed separately from each other, with different staff contacts and only limited staff coordination between cases. More recently, Planning & Zoning staff have taken several steps to improve processing and coordination where a project requires both types of review and approval. Staff from both the Development Division and the BAR Division have been assigned to a Planning & Zoning team for projects requiring both approvals. This team is formed when first contact is made with either Development or BAR staff, and extensive coordination now occurs at every stage of the process.

Recommendation Objectives Pertaining to Issues of Preliminary Development Applications:

I. **Implement Concept Review Process to Address Issues of Completeness:**

Considerable improvement to the completeness/preliminary review process should accrue from implementing a stronger concept review/pre-application process as described in the previous section. Resolving the fundamental issues during concept review should result in plans being filed that are complete and have had their major issues addressed, or which need fewer revisions to be considered complete.

II. Improve Internal Staff Coordination to Address Issues of Preliminary Review: Development Review Team.

Another key to improving the preliminary review process is improving staff coordination. The interagency *Development Review Team* established for each project during pre-application review should continue to meet through the preliminary review process; each project should be discussed at least once by the *Team* for completeness review and again for preliminary review, with additional meetings as necessary for each project. By bringing staff together from all Departments at the same table, a more collaborative review process is possible, facilitating the identification and resolution of conflicting comments. The collaborative process should also help to bring more clarity to each departments comments. As they are discussed and refined among Departments, conditions can be written to more clearly and specifically address issues.

III. Ensure Consistency and Continuity Throughout Review Process:

While development review is conducted by the full *Development Review Team*, it is critical that a single point of contact be maintained within the City for each development project. The *Development Project Leader* appointed during the concept review stage will continue to function in this capacity and will be responsible for the coordinating meetings between the applicant and City Departments, providing information to the public, and finally compiling the City recommendations and preparing the staff report for the Planning Commission and the City Council.

The concept of a project team and the *Development Project Leader* and the interagency *Development Review Team* provides continuity in staff on a project throughout the process. Such an approach should help ease processing as issues do not need to be revisited when new staff people enter or leave the review process. This continuity is therefore an important goal for the process. However, it is also important that the process be independent of any single person. The City must assure that it has sufficient depth in staff so that the process is not halted by the absence or loss of a single individual involved in development review.

IV. Develop & Publish Clear Development Procedures and Standards

While a stronger pre-application process and improved staff coordination are key elements of an improved preliminary process, perhaps the most critical need is for the City to develop and publish clear development procedures, review requirements and checklists, and development standards. The City has never documented its development procedures since they were last revised in 1992 with the adoption of a new Zoning Ordinance.

Procedures: While some checklists for application materials do exist, they are not comprehensive or complete, nor are they available for each stage of the process.

- A clear checklist for application materials that incorporates detailed

requirements from every Department would aid significantly in completeness review. While certain application materials will always be optional depending on the project, having the list for basic requirements should be helpful to the development community.

- Similarly, a single document which sets forth the steps in the development process would be an aid not only to the development community, but also to citizens. Such a document should be prepared and published (with updates as necessary) by Planning and Zoning and should incorporate all the steps in the review process, including those coordinated by other City Agencies such as Transportation and Environmental Services and Code Enforcement.
- To provide assistance to small businesses, a version of the document which takes applicants through other steps typically encountered by small businesses (sign permits, business licenses) should also be prepared.

Standards: Not only do procedures and application requirements need to be documented by the City; development standards need to be developed and published. With published standards, the confusion over development requirements will be minimized and the time necessary to reconcile conflicting interpretations should be significantly reduced. Standards may consist of - but are not limited to - building massing; building articulation; building profiles; open space; step-backs; streetscapes; encroachments; landscaping, parking configuration, and street design.

- Planning and Zoning should prepare and publish (with updates as necessary) the manual, but it should include fire code, zoning code, public facility, archeology, tree preservation and all other standards applicable to development review.

V. Remove Unnecessary Time Limits

It is also recommended that those time limits which now exist in the Zoning Ordinance and are not required by State statute for processing of site plans be removed from the Zoning Ordinance.

Other jurisdictions which do not have decision limits proceed at a deliberate pace toward the public hearing. Once the application is deemed "complete" the application can be scheduled for the Planning Commission and City Council hearings based upon a realistic assessment of the time it will take to properly review the application, receive public comments, address areas of concern and prepare a staff report.

While the amount of time it takes to process applications may vary depending on their complexity, as other recommended measures are implemented in this process (i.e. strong concept review, publishing of standards, and project-specific *Development Review Team*) it is anticipated that projects will take no more time and often less time to move through the preliminary review process than has historically been the case.

VI. Replace Currently Required Untimely, Inefficient Review Meeting with Partnership Approach:

The 1992 Zoning Ordinance requires that a formal Site Plan Coordinating Committee meeting be held on certain - not all - development applications so that a formal, published report of staff comments is presented to the applicant. The public may participate at this meeting.

While the goal of this requirement is laudable, the results are frequently not productive for the following reasons: 1) this requirement does not apply to all applications; 2) applicants frequently do not see staff comment until it is formally published; and 3) the timing of the meeting may come quite late in the process.

For these reasons, it is recommended that the formal Site Plan Coordinating Committee requirement for site plans should be eliminated from the Zoning Ordinance and replaced with an informal meeting or series of meetings for every application where staff and the applicant review City comments. Reviewing detailed comments with applicants prior to publishing the report should streamline the process, provide an opportunity for applicants to understand and address the recommendations, and reduce the need to modify comments during the public hearing process.

It is recognized that this change will eliminate one established point of public participation in the current review process. However, the SPCC meeting does not actually occur for many cases in the City and the experience of staff is that the public rarely attends such a meeting. More importantly, many other measures to expand opportunities for more timely and effective public participation are being recommended in the Citizen Participation section of this study.

VII. Formalize Concurrent Review of Development Applications and Board of Architectural Review Cases:

It is recommended that the current process of a concurrent and coordinated review of development applications and Board of Architectural Review (BAR) cases where projects are within the City's historic districts be formalized. Staff from within Planning & Zoning's BAR Division should be assigned to the *Development Review Team* for a project in the historic districts to ensure that there is concurrent processing and that schedules of hearings before the Board of Architectural Review are coordinated with the schedule of the overall project review process.

Implementing Recommendations: Preliminary Development Applications

1. **The interagency *Development Review Team* established for each major project shall meet to discuss each project at least once during completeness review and at least once during preliminary review; specific departmental comments will be discussed at these meetings.**
2. **The Planning and Zoning staff designated as the *Development Project Leader* shall lead all discussions of the project and shall coordinate any meetings needed between specific agencies and the applicant.**
3. **The *Development Project Leader* shall compile all comments submitted by the *Development Review Team* and prepare the final staff report.**
4. **Planning and Zoning shall prepare and publish development standards which reflect development requirements for all city agencies.**
5. **Planning and Zoning shall prepare and publish documentation of all development processes, including a document geared toward assisting small businesses through every aspect of the City's requirements.**
6. **Planning and Zoning shall publish application requirements and checklists for completeness review and preliminary review.**
7. **All City Departments shall write comments which are specific to the project being reviewed rather than generic comments.**
8. **The current time limit requirements for site plan, rezoning and master plan processing shall be modified to reflect new procedures.**
9. **The Zoning Ordinance requirement for a Site Plan Coordinating Committee meeting for site plans shall be eliminated and replaced with an informal meeting between the applicant and City staff where comments are provided to the applicant in advance of the staff report being published.**
10. **The current process of a concurrent and coordinated review of development applications and Board of Architectural Review (BAR) cases where projects are within the City's historic districts should be formalized by including appropriate BAR staff in the *Development Review Team*.**

C. Final Site Plan Review Process

The final site plan review process is an administrative review process that occurs after approval of a preliminary plan by the Planning Commission or City Council. The applicant submits detailed engineering plans modified to incorporate all conditions of approval for administrative review and approval by City staff.

The final plans are submitted to Planning and Zoning and are forwarded to Transportation and Environmental Services, Code Enforcement, and those City agencies that commented on the preliminary plan for review. Each agency reviews final site plans concurrently and provides their comments to Planning and Zoning, who compiles the comments, resolves conflicts and inconsistencies, and then provides the comments to the applicant.

The applicant addresses the comments, and resubmits the plans for a second review. During the final review of the site plan, other plans such as vacation plats, subdivision plats and easement plats related to the project are also reviewed and approved. The final review process continues until all issues are resolved, at which time the applicant submits a Mylar copy of the plan to Planning and Zoning. This Mylar copy of the plan is reviewed and signed by the Director of Planning and Zoning and the Director of Transportation and Environmental Services (or their designee) and by the Chairman of the Planning Commission.

Once the Mylar for the plan is approved, responsibility for the coordination of the plan passes from Planning and Zoning to Transportation and Environmental Services, who works with the applicant on the bond required for the plan and releases the plan for construction. Any revisions to the plan which the applicant proposes after it has been released are submitted to Transportation and Environmental Services, who routes the revisions for review to Planning and Zoning. Both Planning and Zoning and Transportation and Environmental Services must approve all revisions to an approved released plan for such a revision to be approved as a minor amendment. If, however, either of the Departments judges a revision to be major, then the applicant is instructed to submit a full application for public hearing and approval by the City Council.

To assist in the Transportation and Environmental Services review of final plans, in 1997 the City Council approved the implementation of a final site plan review process that utilizes staff engineers from the Engineers and Surveyors Institute (ESI) and private sector "peer review" engineers to assist Transportation and Environmental Services staff in the review of final site plans. Transportation and Environmental Services schedules each plan for Engineers and Surveyors Institute review once it is distributed from Planning and Zoning. Plans are scheduled for peer review typically within a week to ten days of submission.

While the Engineers and Surveyors Institute program is fundamentally a Transportation and Environmental Services review, the program was designed to include all City agencies in a first step "critical flaws" review, which determines if a final site plan has deficiencies that would preclude full detailed review. This "critical flaws" review is essentially a "completeness" review for final site plans. While the practice has not been consistently applied and only Transportation

and Environmental Services has prepared formal checklists for “critical flaws,” Planning and Zoning and Code Enforcement staffs do participate in the Engineers and Surveyors Institute meetings to identify whether or not the plan is complete. If the plan is not complete, the review stops until a complete plan is resubmitted.

No formal public notice occurs during this process, except in the case of development special use permits within a Coordinated Development District. Section 5-606(D) of the Zoning Ordinance requires that notice be given to the public that a Coordinated Development District final plan is being reviewed, and notice is also given to the City Council prior to release of the final plan within a Coordinated Development District.

Issues Pertaining to Final Site Plan Review Process:

- Developers have expressed significant concern about the length of the final review process. While historically the stated goal was to process and approve a final plan in 3 to 4 months, in recent years it has sometimes taken as long as 8 to 10 months, and occasionally longer, to process a plan.
- City staff and the development community feel that the Engineering and Surveyors Institute (ESI) process implemented by the City several years ago has been helpful for Transportation and Environmental Services review, and should become more productive in the “critical flaws” review with the added participation of Planning and Zoning and Code Enforcement.
- Private sector engineers indicate there are often varying and sometimes conflicting interpretations of what is needed to meet City requirements, and also that it is sometimes difficult to understand the specific issues based upon the departmental comments.
- Staff also raised the issue of conflicting comments, noting that during the final review process conflicting requirements of agencies are sometimes difficult to reconcile, and increase the amount of time necessary for review and processing.
- The development community indicated the bonding process is confusing and time consuming.
- The development community felt that resolving details such as landscaping sometimes holds up the release of final plans unnecessarily.
- The development community expressed the need for flexibility in the City for pre-release of final plan elements such as grading permits or utility plans.
- City staff and the development community noted how cumbersome the notice process was for final plans within Coordinated Development Districts; with City staff pointing out that it appears to provide little benefit to the public at a significant cost in time and resources.

- City staff noted that final plans are often submitted with changes that are not a result of approval conditions and which are not identified.
- City staff indicates that the quality of plans submitted for review is frequently poor.
- Planning and Zoning staff noted that City Departments and outside agencies often do not respond to requests for comments within the established time frame for comments.
- The public is concerned that projects may change during the final site plan process as conditions are addressed in ways that are unanticipated and undesired by the community.

Recommendation Objectives Pertaining to Issues of Final Site Plan Review:

I. **Expedite Final Site Plan Review by Addressing Complex Issues in Pre-Application Process:**

Many of the changes already recommended for the pre-application and preliminary plan processes should also greatly improve the final review process. Strengthening the pre-application and concept review process should result in resolution of more issues prior to final site plan. Currently, part of the problem with the final process is that many difficult issues are deferred to this final process because there is no time earlier in the process for adequate review or resolution of issues.

- Publishing development checklists, procedures, requirements and a Development Standards Manual will eliminate confusion over the City's requirements and should reduce the amount of time necessary to resolve conflicting comments from agencies.
- The work done during preliminary review to create clearer, more specific comments for incorporation into staff results should result in less confusion over the City's ultimate expectations and should provide more certainty to the public and decision makers about the finally approved project.

II. **Expedite Final Site Plan Review by Uniform Coordination & Consistency:**

Also, as with the other phases of development review, the final site plan process should benefit significantly from generally improved staff coordination. The single point of contact within the City established during concept review should be maintained throughout this final phase for each development project. Currently this does not happen, and the applicant is often expected to contact various staff in different departments to determine the status of various reviews. The Planning and Zoning staff designated as the *Development Project Leader* acts in this capacity and is responsible for coordination of all activities relating to a development project.

III. Regularize Submission Requirements:

- a. All submissions to the City shall be submitted to the *Development Project Leader*. Currently, materials are often submitted to various departments addressing specific issues. This creates a technical legal issue (because the file does not then contain all of the documents for a particular case), but also creates confusion among staff and reduces the efficiency of the process.
- b. All submission of final site plans to the City should be accompanied by a letter addressing each condition of approval for the first review or, on subsequent reviews, each department's prior comments. All changes to the plans should be identified on the plans (redlined) and explained in the letter. While this is sometimes done currently, it is not done consistently. Such a submission greatly facilitates the staff's ability to review plans, reducing the time necessary.
- c. In addition, all approvals related to a project should be submitted concurrently. Development projects typically include subdivisions and may also include vacations or other approvals. Easement plats are typically necessary. Currently, these plats are submitted in a haphazard fashion throughout the process and this often slows down the final approval because these other documents typically must be reviewed and approved before the final plan is released.

IV. Establish Final Site Plan Review Processing Time-Lines:

Specific time-lines should be established for each step in the final review process and every Department should be instructed by the City Manager to adhere to the established guidelines for responding. Because there are so many steps in the final review process, a delay of only a few days in each step can cumulatively result in weeks or months.

- Planning and Zoning should be required to distribute all plans received in their office to the appropriate review departments within one to two days.
- Transportation and Environmental Services should be required to schedule Engineers and Surveyors Institute review meetings within eight days of receipt of the plans.
- City staff should make every effort to provide final comments on the first submission of the final site plan to applicants within four weeks of submission (i.e. about three weeks after the Engineers and Surveyors Institute review).
- Subsequent resubmissions of final plans, which should have fewer issues, should be processed by staff within two weeks of submission. However, if plans are resubmitted with issues not addressed or plans changed, the subsequent review will realistically take longer.
- Mylars should be reviewed and signed by each agency within one week.

While these time frames are aggressive, they are workable and they should result in plans

being released within about 3 months. They do rely on the City continuing to provide the increased staff resources that have been provided to Planning and Zoning, Transportation and Environmental Services and Code Enforcement over the last year.

V. Refine Engineers and Surveyors Institute Process:

The City's Engineers and Surveyors Institute process should be refined so that it can be a more successful component of the City's final review process. Planning and Zoning and Code Enforcement staff should participate in the "critical flaws" process, and final plans that do not pass the "critical flaws" review should not be further reviewed by any agency.

- Planning & Zoning has recently begun participating in critical flaw reviews and is preparing a planning critical flaws checklist for staff and the developers.
- Code Enforcement should also participate in the weekly Engineers and Surveyors Institute meetings and prepare a checklist for "critical flaws."
- Applications that do not pass the critical flaws review should continue to be rejected and returned to the engineer with the deficiencies noted.
- When this occurs, the *Development Project Leader* should send the applicant a letter indicating that the application is not complete and list the items that are needed to complete the application.

Should there continue to be unresolved issues, additional *Development Review Team* meetings may be scheduled to ensure that all agencies participate in the resolution. It is anticipated that if the Engineers and Surveyors Institute process is implemented as intended, with a stringent "critical flaws" component, that over time the quality of plans initially submitted would improve, facilitating faster processing of final site plans.

It is appropriate that the *Development Project Leader* be present at the detailed engineering review, Stage II of the Engineers and Surveyors Institute review. However, because the amount of time spent on highly technical Transportation and Environmental Services issues during this Stage II review is significant, it may not always be the most productive use of the *Development Project Leader's* time to attend all Engineers and Surveyors Institute meetings on a project. But since draft comments are going directly from Transportation and Environmental Services to applicants at these meetings (without benefit of coordination with other Departmental comments), it would be beneficial for the *Development Project Leader* to participate and address any significant conflicts in various staff comments on the spot.

VI. Regularize Procedures for Partial Releases of Portions of the Final Site Plan:

Currently, in order to expedite the development process, City staff sometimes pre-releases components of the final site plan such as grading plans, utility plans or infrastructure plans. However, no formal procedures exist to promote or regulate these pre-releases.

While on smaller scale plans, pre-releasing portions of the plan may require significant additional staff time for very little benefit to the applicant, in complex or large scale projects the relative cost to staff and the benefit to the applicant are more balanced. The fee study currently being undertaken by the City could include measures to offset the staff costs for such pre-releases. But in any case, these pre-releases do provide significant benefit to many applicants and should be promoted and facilitated by the City.

- Specific procedures should be developed and published by Planning and Zoning in close consultation with Transportation and Environmental Services and Code Enforcement staff which define the types of pre-releases available to applicants and the requirements for such pre-releases.
- All pre-releases of the final plan must be coordinated by the *Development Project Leader* who is in the position to assure that a pre-release does not conflict with any agency's requirements in order to avoid issues which have sometimes occurred in the past, such as disturbance of archeologically significant lands.

The development community has indicated the desire to get final site plans released prior to some details being resolved which do not affect the release of the site plan. Most commonly, the types of issues that remain unresolved are landscaping or architectural. This report recommends that landscape plans and architectural plans (including screening plans) be permitted to be released separately, if necessary to expedite the process, and only if the unresolved issues clearly would not affect the site plan. This practice is currently employed to expedite development, but it is not applied consistently. The City's published procedures should specify the rules and procedures whereby approval of these elements can be deferred until after the release of the final plan.

VII. Establish Clear & Early Bonding Procedures:

The bonding process was identified by many in the development community as cumbersome and time-consuming. City staff indicates that there have been discussions in the past of adjusting the bonding process so that engineers submit bond estimates on a sheet of the final site plan with the submission. This approach is utilized in some other Northern Virginia jurisdictions and should have the effect of reducing the amount of staff effort required to prepare the bond. This approach has the advantage of getting the bonding process started earlier in the process and reducing the likelihood that it will become an impediment to release at the end of the review.

- Transportation and Environmental Services staff should prepare clearly defined procedures for bond preparation which require that the applicant submit the bond estimates with the first and subsequent final site plans.

VIII. Replace Current Coordinated Development District Final Plan Public Notice Procedures with More Effective Citizen Outreach:

The requirement for public notice for final site plans within the Coordinated Development District is a cumbersome process for staff and applicants, because strict deadlines must be adhered to. Planning staff believes the notice provides little benefit to the community because it occurs so late in the process and because the opportunity for citizen input or appeal at this stage is severely limited by the Zoning Ordinance to technical rather than substantive issues.

The Coordinated Development District final notice requirement should be eliminated and replaced with the newly proposed package of notice procedures and citizen outreach discussed in the final Section of this report.

Implementing Recommendations : Final Site Plan Review

1. **All submissions to the City—even if intended to address one specific Department’s issues— shall be submitted to the designated *Development Project Leader*.**
2. **All submissions of final site plans shall have changes to an earlier submission redlined and shall be accompanied by a letter addressing all comments/conditions and changes.**
3. **All approvals related to a development plan shall be processed concurrently for final approval, including subdivisions, easement plats and vacation plats.**
4. **Planning and Zoning shall distribute all submissions to reviewing agencies within two days. Transportation and Environmental Services shall schedule Engineers and Surveyors Institute review within eight days.**
5. **First final review comments shall be provided by Planning and Zoning to the applicant within four weeks of submission of the final plan.**
6. **If indicated, additional *Development Review Team* meetings will be scheduled to resolve remaining issues.**
7. **Subsequent (post-first) final review comments shall be provided by Planning and Zoning to the applicant within three weeks of submission of the final plan.**

8. **Mylars shall be reviewed within one week by each agency (Planning and Zoning and Transportation and Environmental Services).**
9. **Planning and Zoning and Code Enforcement staff shall prepare Critical Flaws Checklists for use in the Engineers and Surveyors Institute process and shall attend the critical flaws portion (Stage I) of the Engineers and Surveyors Institute meetings.**
10. **The Planning *Development Project Leader* shall attend the Stage II (Detailed Engineering Review) Engineers and Surveyors Institute review meetings for their projects to the extent feasible.**
11. **The City shall promote pre-release of portions of site plans and Planning and Zoning, in coordination with Transportation and Environmental Services and Code Enforcement, shall publish specific procedures for the pre-release of portions of final site plans.**
12. **The City shall allow release of final site plans where details related to landscaping or architecture (including screening) remain to be worked out.**
13. **Engineers shall submit bond estimates on a sheet of the final site plan, and clear procedures for the bonding process shall be developed by Transportation and Environmental Services and published by Planning and Zoning as part of overall development procedures, though changes could occur over time.**
14. **The notice requirements for final site plans within a Coordinated Development District shall be eliminated.**
15. **Permit*Plan, the City's electronic permit tracking software, shall be utilized by all City agencies to submit comments to Planning and Zoning and to sign off on final plans and any pre-releases of final plans.**

D. Building Permits

This study does not include a full review of the building permit process; rather, its focus is limited to the coordination of building permit review with the final site plan. Code Enforcement is responsible for managing the review of building permit applications and for issuing building permits. Planning and Zoning and Transportation and Environmental Services, as well as other City offices, must review and approve all building permits applications before Code Enforcement can issue the permits. Building permits are submitted to Code Enforcement, who then typically routes the application and plans sequentially to Planning and Zoning and then to Transportation and Environmental Services. These agencies review the plans, stamp them approved, and sign off on them in the City's automated permit tracking system, Permit*Plan. The goal for review time is two weeks for each agency, but large projects frequently take longer.

Historically, building permits were reviewed sequentially. After submission to Code Enforcement, the permits were sent to Planning and Zoning and Transportation and Environmental Services for their review. The building permit application could not be submitted for review until a final site plan for the project had been approved. Recently, however, in order to expedite the review process, Code Enforcement has allowed building permits to be submitted prior to release of the final plan in order to do a pre-permit code enforcement review. This study recommends regularizing this procedure.

Issues Pertaining to Building Permits:

- The development community has suggested concurrent processing of building permits and final plans.
- The development community has expressed the difficulty of tracking building permits through and within City agencies; staff indicates they also have difficulty tracking permits.
- Planning and Zoning staff has indicated that building permits are submitted which are frequently inconsistent with the approved site plan, requiring either revisions to the approved final site plan or revisions to the building permits themselves.

Recommendation Objectives Pertaining to Building Permits:

I. Initiate Concurrent Processing:

The one significant change the City could adopt to expedite development review for applicants is to concurrently process building permit applications among City agencies while final site plans are being reviewed.

- Code Enforcement already does a pre-permit review of building permits to accommodate applicants.

- Planning and Zoning has indicated that a concurrent review may actually benefit the Planning staff by helping staff to identify inconsistencies between building permits and final plans before the final plan is released.

This study recommends that Planning and Zoning implement concurrent review of final site plans and building permits, accepting building permits for review after the first final site plan has been reviewed; provided that no fundamental issues remain that would change building foot prints after that review.

Clearly, the plans cannot be finally approved by any agency before the final site plan is actually released, but this pre-review process should shorten the time necessary for building permits after final release.

II. Improve Automated Tracking System:

Tracking of permits by applicants has sometimes been an issue within the City. Each agency that reviews permits should establish an internal tracking system for building permits, preferably within the City's existing permit tracking system. Implementing concurrent processing does generate technical complexities related to processing and tracking of plans. Even without concurrent processing, the tracking of plans within the City is sometimes problematic. Code Enforcement will now need to track multiple versions of plans being sent to Departments for review. Permit*Plan should provide the capability necessary for this tracking.

Implementing Recommendations : Building Permits

1. **Planning and Zoning shall concurrently review building permits with final site plans, commencing no sooner than after the first final review of the site plan.**
2. **The City's permit tracking system shall be modified to incorporate tracking of permits within agencies.**

III. CITIZEN PARTICIPATION PROCESS

Overview

One of the major goals of this study is to ensure timely and appropriate citizen participation within the development review process. The City's existing process incorporates many formal requirements for notice to citizens about development applications, and the City maintains a number of sources of information available to citizens about development applications. In addition, more recently, the Department of Planning & Zoning has been reaching out to citizen groups earlier on some major projects which is a practice that most citizens agree has been successful.

However, despite these opportunities for citizen participation in the review process and the considerable amount of staff resources that are dedicated to public notice requirements, there continues to be citizen concerns regarding the public's ability to participate in the review process and to access information on development proposals from the City.

Issues Pertaining to the Citizen Participation Process:

- The interviews with representatives of civic associations revealed that the community generally has a high regard for individual members of City staff. However, there is a considerable mistrust of the overall development review process during the past years..
 - In fact, the City staff and residents often express similar concerns or areas of support for individual projects. However, in the past some residents have attempted to negotiate directly with developers necessitating multiple comments from the City and residents and a lengthened review process for the applicant.
 - Because of the lack of coordination between the concerns and/or support of City staff, developers and residents, there are often unanticipated and undesirable consequences. Therefore, none of the stakeholders in the process obtains the desired outcome.

More specifically, the concerns identified by the citizens include the following:

- The issue of timing. Historically, citizens believe there has been an inability to provide substantive comments early enough in the review process so their concerns can be addressed.

- Because of the perceived inability to provide comments at an appropriate time in the review process in the past, a general mistrust of the City's development review process has developed.
- Citizens have also identified the lack of a clearly defined mechanism to have the City, citizens and developers concurrently address important issues and concerns.
- Citizens have also criticized the lack of a clearly defined central point of contact in the City for information about a development project. Many times finding information involves obtaining status from numerous City departments.

Recommendation Objectives Pertaining to Issues of Citizen Participation:

I. Establish Formal Practice of Scheduling Community Meeting Prior to Formal Development Application Submission:

To address citizen concerns, it is important that the current practice of involving citizens earlier in the process become a formal policy to foster increased cooperation between the citizens and the City. To ensure that citizens are aware of a major development application (and developers are aware of potential citizen concerns) early in the review process, this study recommends that a community meeting be scheduled by Planning and Zoning during the Pre-Application phase of the development process.

The question of timing here is an important one. Some citizens have requested to be included in the development review process as soon as the City is aware of a potential application. However, this would be before the City has an opportunity to review the potential development project for basic compliance with existing City codes and policies. It would be unproductive for the public to comment on a proposed project which does not meet minimum legal requirements and which will be returned by City staff to the applicant for revision and compliance before it is accepted for formal review.

It is clear that basic Zoning Ordinance and code compliance issues and legal and due diligence requirements of the applicant all need to be addressed and incorporated into the application before it can provide a necessary level of information adequate for public review. During the conceptual review process, staff need to be sure that basic planning and zoning components of a proposal such as, land-use, height, massing, scale, open space, and design comply with the applicable provisions of the Zoning Ordinance. After the fundamental planning and zoning and code requirements have been addressed, other fundamental technical issues such as fire accessibility need to be reviewed for compliance by City staff

This study therefore recommends that the appropriate entry point for citizen comment in

the pre-application phase is after the staff determines that the project meets legal requirements. While this is earlier than other jurisdictions such as Arlington and Fairfax, it is recommended within the context of this comprehensive development review schedule.

The purpose of the pre-application community meeting is to enable the Planning and Zoning's *Development Project Leader* to describe the proposed development to the community; to present and discuss issues identified by City staff; and to provide a forum to solicit citizen comment earlier in the review process.

- The meeting should be coordinated by Planning and Zoning, and the developer/applicant should be available for questions from the public during the meeting.
- The City will be responsible for providing notice of the meetings to citizen organizations and notice will also be placed on the City's web site.
- To maximize the resources of City staff the community meetings will be routinely scheduled within City Hall.
- For more complex projects, additional community meetings may be scheduled if deemed necessary by the Director of Planning and Zoning.

Following the identification of issues by City staff and/or citizens during the community meeting, the applicant may submit a formal application. While the application may be submitted prior to resolution of the issues identified within a community meeting it is strongly recommended that major issues be resolved before formal submission of an application. Such an approach is likely to reduce processing time in later steps of the development process.

II. Advance Required Posting Date to Time when Formal Application is Submitted:

Currently, properties for which a development application have been submitted are posted with notice by the City at least ten days before public hearing. This study recommends that earlier notice to individuals in the vicinity of a development project be provided. Therefore, it is recommended that the property be posted earlier, commencing five days after a formal project application is determined to be "complete".

- It is recommended that the developer/applicant will be required to physically post the property within five days after the application is determined to be "complete" by the *Development Project Leader*.
- The notice will include a description of the proposal, the date of the development review meeting and contact information on the project.
- The developer will submit an affidavit to the Planning & Zoning Department stating that the posting was installed and has remained on the property until the date of public hearing.
- The specifics of the posting should be clearly defined in the Planning & Zoning rules of procedure recommended by this study.

III. Schedule Community Meeting for Major Development Projects During the Preliminary Development Review Process:

For major development projects or those projects that may have significant impact on neighborhoods, the Planning and Zoning Director can authorize the *Development Project Leader* to schedule a community meeting on the proposed development during the preliminary development review process. This meeting would be scheduled after the project application is determined to be complete and early enough in the preliminary development review process so that community feedback can be incorporated into the staff review process.

The purpose of the community meeting is to enable the Planning and Zoning's *Development Project Leader* to describe the proposed development to the community; to present and discuss issues identified by City staff; and to provide a forum to solicit citizen comment.

- The meeting should be coordinated by Planning and Zoning, and the developer/applicant should be available for questions from the public during the meeting.
- The City will be responsible for providing notice of the meeting to citizen organizations and notice will also be placed on the City's web site.
- To maximize the resources of City staff the community meetings will be routinely scheduled within City Hall.
- For more complex projects, a second community meeting may be scheduled if deemed necessary by the Director of Planning and Zoning.

IV. Encourage Written Comments from Public:

At any time during the application review process, written comments from citizens should be encouraged.

- The written comments should be attached to each technical staff report prepared by City staff.
- Written comments should be addressed to the Planning and Zoning *Development Project Leader* for each project and can be hand delivered, mailed or emailed.
- All written comments will need to be received by Planning & Zoning 15 days prior to a scheduled hearing to be attached to the staff report.
- The staff reports should continue to be released to the general public 11 days before a public hearing before the Planning Commission or City Council.

V. Improve Public Accessibility to Development Applications & Assign Central Point of Contact:

To ensure adequate availability of information all active site plans and applications should be available at the front desk for the department of Planning & Zoning.

A list of development applications should also be available to the City staff who answer the main numbers in the Planning Department and information should be placed on the City's web site.

- The list of development applications will include the *Development Project Leader* assigned as the coordinator for the City for each development application.
- The *Development Project Leader* will be the primary contact for the public to obtain the latest information or to comment regarding a development application.

VI. Use of Registry of Citizens Associations:

The City's Office of Citizens Assistance keeps a list of all Citizens Associations and updates the list regularly. While the City solicits information and updates from citizen organizations, ultimately it is the responsibility of citizens to assure they are properly represented on this list.

This list should be used by Planning & Zoning staff for notifying appropriate citizen groups of scheduled meetings on development proposals. The City should ensure that the community understands that the Citizen's Assistance registry will be utilized for development notification, as an inducement for interested groups to keep their contact information current. It is the intent that individual organizations, once notified, will ensure that individual residents or other affected groups will also be contacted by the citizens organizations.

It is recommended that the City investigate a web-based means that allows citizen groups to easily provide updates to the information on the list.

VII. Develop Community Education and Outreach Program:

A community education and outreach plan should be prepared by Planning & Zoning to inform members of the community on the new development process once the recommendations of this study are adopted. The outreach program will also provide an opportunity to establish a better working relationship between City staff and many of the resident organizations. The outreach plan at a minimum should include meetings with the community, handouts and the use of the City's web site. Full implementation of such a plan may require additional staff resources.

VIII. Encourage Community Input in the Establishment of Development Standards for New Projects:

Ultimately, the most effective ways for citizens to have a voice in shaping the character and form of their community and future development through participation in the broader planning initiatives the City has begun to undertake, and through the participation in the creation of development standards. The planning and creation of development standards will enable citizen participation on a community-wide basis instead of forcing citizens to be in a reactive mode for each development application.

Implementing Recommendations: Citizen Participation Process

1. **Establish formal policy and practice of scheduling community meetings on potential development projects after the staff determines that it meets minimum legal requirements but before an application is formally filed.**
2. **The developer shall be required to provide and maintain physical notice on the property once an application is submitted. The posting shall include the dates of any required hearing. The requirements for the legal notice to adjoining property owners shall continue to be the responsibility of the applicant. The developer will submit an affidavit to the Planning & Zoning Department stating that the posting was installed and has remained on the property until the date of public hearing. The specifics of the posting shall be clearly defined in the Planning and Zoning rules of procedure recommended by this study and will require a zoning text amendment. The earlier posting of the property will enable the adjoining residents to be aware of a project earlier in the development review process.**
3. **For major development projects or those projects that may have significant impact on neighborhoods, the Planning and Zoning Director can authorize the *Development Project Leader* to schedule a community meeting on the proposed development during the preliminary development review process.**
4. **At any time during the application review process, written comments from citizens should be encouraged.**
5. **Development applications and plans shall be made available at the front counter of Planning and Zoning. The list of development applications shall be available on the City's web site and be made available to those who answer the main numbers in City Hall.**

6. **A *Development Project Leader* will be assigned by Planning and Zoning to each development project. The *Development Project Leader* will be the primary person of contact for specific questions regarding an application and will coordinate concerns of the City, applicants, and citizens.**
7. **Planning and Zoning staff should use the City's Office of Citizen Assistance list of Citizens Associations to notify appropriate citizen groups of scheduled meetings on development proposals. The citizen organizations will be responsible for keeping the list up-to-date by notifying the City of any changes. It is the intent that the individual organizations, once notified, will ensure that individual residents or other affected groups will also be contacted by the citizens organizations.**
8. **Planning and Zoning shall prepare a community outreach plan to inform the community of the new development review policies and responsibilities. The outreach program will also provide an opportunity to establish a better working relationship between City staff and many of the resident organizations. The outreach plan at a minimum shall include meetings with the community, handouts and the use of the City's web site. Full implementation of such a plan may require additional staff resources.**

IV. STAFF COORDINATION AND RESOURCES

Need for Enhanced Staff Coordination

Improved staff coordination and resources are key to the success of each component of the City's development review process. Throughout each of the earlier sections of this report, there is a discussion of how enhanced coordination can benefit that specific process.

Over the last year, the City has added personnel to support the development review process – particularly within Planning and Zoning. It is these additional resources which have in large part enabled staff to begin implementing a more pro-active and coordinated approach to the development review process. It is essential that City Departments continue to be provided the necessary resources to adequately implement the recommendations of this study.

Coordination is the key to a successful development review process. The process is extraordinarily complex with multiple participants, including: property owners; developers and the architectural and engineering members of their development teams; dozens of different City Departments and divisions; utility companies; outside agencies such as the Park Service or the Washington Metropolitan Area Transit Authority; numerous City boards and commissions; City officials; and numerous citizen associations and other civic groups.

Complicating coordination is the fact that the responsibility for coordinating review passes from various City Departments depending upon the status of the review. The responsibility for coordinating the development process begins with Planning & Zoning Department and is passed to Code Enforcement and Transportation & Environmental Services as the process progresses. More specifically the responsibilities of each department are as follows:

Planning & Zoning coordinates review of:

- conceptual/pre-application development plans
- completeness development plans
- preliminary development plans
- preliminary subdivisions
- final development plans
- final subdivisions
- major plan amendments

Code Enforcement coordinates review of:

- building permits

Transportation & Environmental Services coordinates review of:

- minor plan revisions
- as-built site plans

Issues Pertaining to Staff Coordination and Resources:

The development community, City staff and citizens generally agree that enhanced coordination throughout the process is necessary and would be beneficial. Examples of current coordination problems identified by the “stakeholders” interviewed include:

- There is confusion about what City Department to talk to at various steps of the process or to secure certain information.
- The process, policies and procedures are not well documented and therefore result in delays.
- There are inconsistencies as to whom and exactly when plans are to be submitted. This results in routing and tracking problems. For example, final subdivision plans are submitted directly to Planning & Zoning, yet the final easement plats for the subdivisions are often submitted directly to Transportation and Environmental Services.
- City Departments often are not able to submit completeness and/or preliminary comments to Planning and Zoning by the required deadlines.
- An applicant/developer attends a meeting with a City Department for a decision about an issue, but other City Departments that may be impacted by the issue are not necessarily notified to also participate in the meeting.
- The staff that each City Department sends to attend to each meeting varies based upon the meeting, which often creates inconsistencies between meetings and varying comments to the applicant/developer.
- The staff representatives from a City Department are often not authorized to make the necessary decisions at the meeting, which often causes additional delays.
- City staff are sometimes unaware of the issues of other Departments and agencies and direct applicants to make changes inconsistent with the requirements of the other departments and agencies.
- City staff do not always understand all the procedural items within the process, and may make comments on a final plan that are in conflict with conditions of approval by the

Planning Commission or City Council.

- The Planning and Zoning and Code Enforcement Departments do not regularly participate in the Engineers and Surveyors Institute peer review process.
- City staff review applications separately and comments are sent to Planning and Zoning to incorporate into a staff report for the Planning Commission. There is no administrative mechanism in place to resolve basic differences among staff recommendations. Differences between City Departments result in delays for the applicant/developer.
- There is no central place that an applicant or citizen can go to find out the status of an application.

Recommendation Objectives Pertaining to Issues of Staff Coordination and Resources:

This study finds that the three keys to improved staff coordination within the process are:

- Implementation of an interdepartmental team-based approach to development review, with a clearly identified project-specific *Development Project Leader* and *Development Review Team*, and
- Establishment of a senior staff *Development Overview Committee* which would help to ensure interdepartmental cooperation in the overall development process, and
- preparation of more clearly defined and documented review procedures and policies, and development standards.

I. **Establish a *Development Review Team* for each Development Project:**

To improve interdepartmental coordination of development review at the specific project application level, a *Development Review Team* will be formed for each development project composed of representatives from each Department with review responsibilities for the project, such as Planning and Zoning, Transportation and Environmental Services, Code Enforcement, and Parks and Recreation. Membership on specific teams may vary according to the requirements of the proposed development application.

The function of the *Development Review Team* will be to review, discuss and make decisions regarding a specific development project, and when necessary to work out conflicting City requirements. When appropriate, the *Team* may also focus on expediting a small or medium sized project, which responds to the City's goals and objectives.

Meetings of the *Development Review Team* will be scheduled and coordinated by a designated *Development Project Leader* from the Department of Planning and Zoning. It is recommended that a standard time be set aside each week for meetings of the *Development Review Teams*, so that staff from the various Departments can reliably anticipate when a project will be reviewed. It will be the responsibility of each *Development Project Leader* to request time on the agenda from the Planning and Zoning Development Division Chief who will maintain the schedule. For complex projects, the *Development Review Team* may need to meet more frequently, or outside the time limits of the regularly scheduled time. It will be the responsibility of the *Development Project Leader* to schedule and coordinate these additional meetings with *Team* representatives from the other departments.

II. Define the Functions of the *Development Project Leader*:

For each development project in the City, Planning and Zoning will assign a planner as *Development Project Leader* to coordinate that project. In order to improve city-wide coordination, the *Development Project Leader's* role as well as that of the other team members of the *Development Review Team* should be made clear to the applicant and to the public. The *Development Project Leader* should function as the team leader for the interdepartmental development review team and should:

- coordinate the development application and review process from conceptual review through the release of the final site plan. This would include coordinating any review by the Board of Architectural Review and any related applications such as subdivision, vacations, master plan amendments, rezonings, or encroachments.
- directly receive all plans and materials submitted to the City by the applicant, including any supplemental information intended to address specific concerns of any Department. This would include all preliminary and final site plans and subdivision and easement plat submission.
- assure that meeting summaries are prepared and distributed for all meetings on the project,
- designate the dates when a preliminary application will be scheduled for the public hearing before the Planning Commission and City Council,
- establish deadlines for all interdepartmental comments,
- compile all departmental comments on the project and, where necessary, combine and clarify comments from all City Departments (without caning content),
- act as a focal point for providing all written comments to the applicant (comments will not go from individual Departments directly to the applicant)
- compile all comments from boards, commissions and the public,
- prepare the staff reports for the Planning Commission and City Council,
- notify Transportation and Environmental Services when a final plan has been submitted for Engineers and Surveyors Institute review so that Transportation and

Environmental Services can schedule an Engineers and Surveyors Institute meeting,

- attend the critical flaws portion of all Engineers and Surveyors Institute meetings and attend other ESI detailed engineering review meetings on the project where significant issues are likely to be discussed, (i.e. first final reviews or reviews where significant issues have already been identified),
- authorize the submission of mylars, and receive the mylars from the applicant and distribute to Transportation and Environmental Services, and
- authorize all pre-lease of final site plan elements, and notify applicant that final plans have been released.

III. Define the Responsibilities of Departments and Team Members of the *Development Review Team*:

When Planning & Zoning identifies a proposed development project and designates a *Development Team Leader* for a specific project, notice should be sent to affected City departments. Departments should immediately designate the individual who will represent the department on the *Development Review Team* and notify the *Development Team Leader*. The team member must have the authority to make decisions on behalf of his/her department in order for the *Development Review Team* to be effective. Team members have the following responsibilities:

- participate in all *Team* meetings,
- review development plans promptly and meet the established review schedule,
- compile departmental comments and coordinate such comments within the department,
- refer general project inquiries from applicants or citizens to the *Development Team Leader*,
- inform applicants that projects submissions must be sent to the *Development Team Leader*, and
- keep the *Development Team Leader* informed about departmental issues regarding the development project.

IV. Establish a *Development Overview Committee*:

In addition to the City's need for close Departmental coordination on specific development projects as discussed above, the City would also benefit from a regular forum where a more comprehensive assessment and approach to City-wide impacts of development projects can be carried out. The proposed *Development Review Teams* discussed above will ensure that individual projects meet City standards. However, it is equally important to provide a mechanism whereby the various City departments can jointly review and monitor the cumulative impacts of proposed development projects, resolve any inter-project conflicts, and make recommendations for improving

development processes and procedures. In addition, the proposed *Development Overview Committee* would also address cross-cutting issues posed by large or complex development proposals.

The functions of this proposed *Committee* are three-fold:

- Monitor cumulative impacts of proposed development projects, ensure interdepartmental coordination that crosses specific development project boundaries, and resolve inter-project conflicts,
- Continuously review development processes and procedures and make recommendations for improvement, and
- Improve existing regulations, i.e., resolve standing conflicts among current regulations and monitor the preparation of a Development Standards Manual.

It is proposed that this *Committee* be composed of a representative from Transportation and Environmental Services, Parks and Recreation, and Code Enforcement, and chaired by the Development Division Chief of Planning and Zoning. It is further recommended that this *Committee* meet in a regularly scheduled bi-monthly meeting, with the flexibility to meet more often if required.

It is not the purpose of the *Development Overview Committee* to second guess the decisions made by a *Development Review Team* but rather to provide the City the ability to ensure interdepartmental cooperation in the development process. Any interdepartmental issue which cannot be resolved by the *Overview Committee* shall be referred to the City Manager for decision.

V. Prepare Written Rules and Procedures for Development Review Process:

To address the concerns of the development community and citizens that the review process and policies are not clearly defined, the Planning & Zoning Department should prepare written rules, procedures and a description of the review process. The Planning and Zoning procedures and policies should at a minimum include:

- meeting procedures,
- notification procedures,
- public participation procedures and procedures for application tracking/monitoring.

In addition, the City will prepare interdepartmental policies and procedures for the development review process.

VI. Improve Staff Coordination through Expanded Use of Current City Technology:

The City's existing technology is not being fully utilized by the Departments. It is

anticipated that expanded use of the current technology would improve staff coordination.

For example, although the current Permit*Plan system has significant limitations, it could be utilized as a mechanism to better facilitate review, approvals and coordination. The use of Permit*Plan technology will permit the easy review of the entire range of comments on an individual application.

The *Development Project Leader* should establish and disseminate policies and procedures for maintaining a comprehensive list of electronic files for individual development review projects, in consultation with the City's permitting committee.

VII. Implement Staff Training:

The importance of a customer service orientation is especially critical for local government employees. Although development customers during interviews were pleased with the way certain City staff provided answers and assistance, they did not have uniformly good experience with all the staff. Formal customer service training should be established for all City staff.

Of particular importance is improving customer service to small business applicants. The Department of Planning and Zoning should appoint a point of contact to assist all small business applicants through the development process.

Planning & Zoning staff who are designated as *Development Project Leaders* should be scheduled for project leadership training. Examples of the type of courses that could be made available include Team Management, Negotiation Techniques, and Conflict Management.

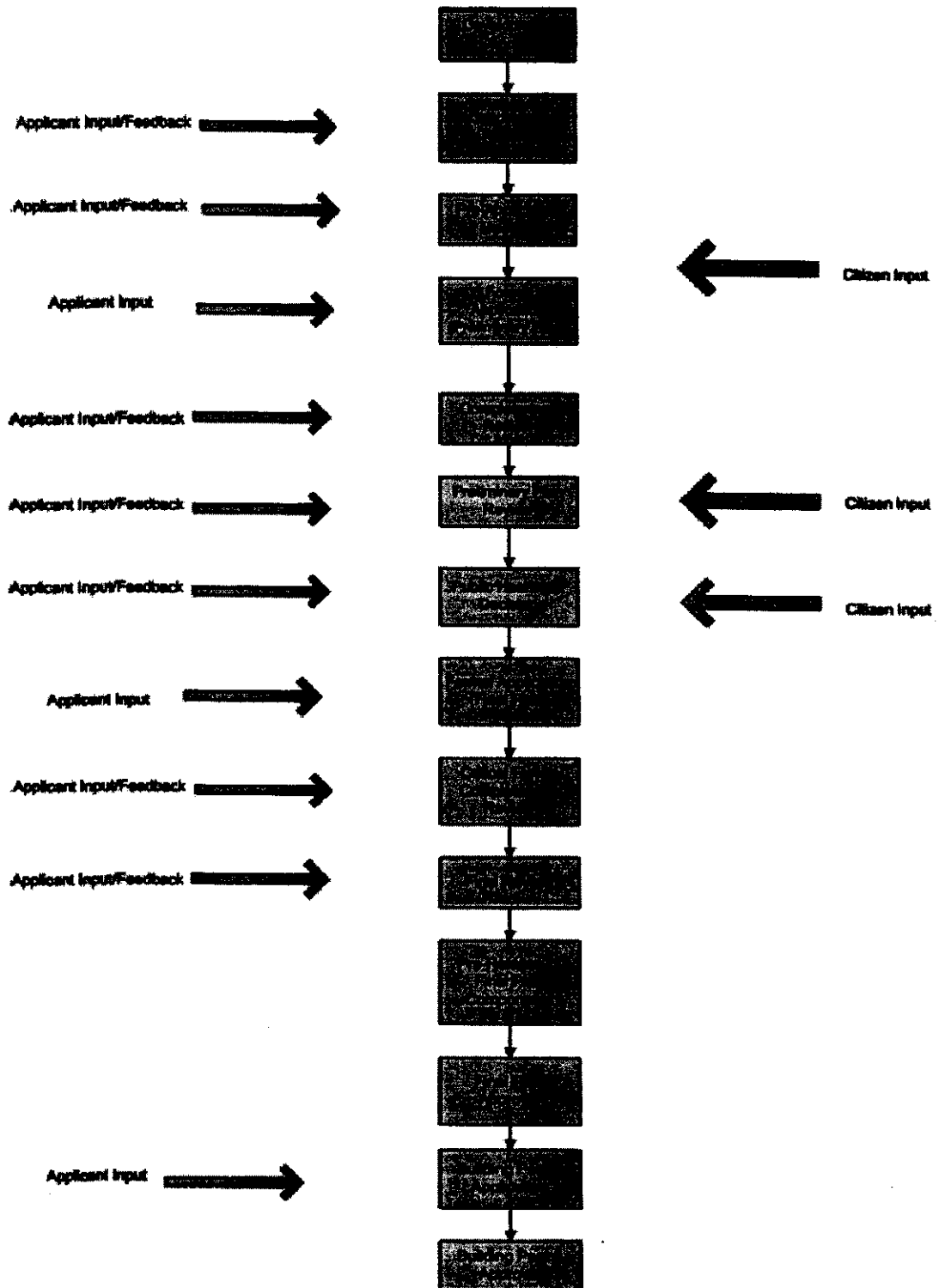
Implementing Recommendations: Staff Coordination & Resources

1. **The Director of Planning & Zoning will appoint a *Development Project Leader* for each development application. The role of the *Development Project Leader* will be to ensure the efficient coordination of applications throughout the process by means of the *Development Review Team* with members from each Department with responsibility to comment on an application, and to ensure effective transitions of applications from Departments as applications proceed through the conceptual, preliminary, final and building permits review process.**
2. **The *Development Project Leader* for each project will be the person of contact for the applicant and will coordinate all meetings with the applicant for the City; be**

responsible to notify all affected Departments; and establish and maintain a record of all comments.

3. **Transportation and Environmental Services and Code Enforcement, and other departments as appropriate, will designate a lead staff person for each major development project as a member of the *Development Review Team*. This person will represent the Department at all meetings on the specific project. The staff representative from each department will be authorized to make decisions for his/her department regarding site plans and processing.**
4. **Establish a senior-level *Development Overview Committee* to ensure interdepartmental cooperation in the development process.**
5. **To enhance City staff review of site plans, the applicant for each and all development applications will be required to submit all preliminary and final plans in digital form(CD-ROM) that will be readable by ArcInfo2000. The primary staff responsible for site plan review within each Department (Planning and Zoning, Transportation and Environmental Services, and Code Enforcement) will receive the additional training that may be necessary.**
6. **Cross-training for their staff should be initiated by each Department to ensure that the absence of an individual person will not delay the overall review or approval process.**
7. **Completeness, preliminary and final review comments by each Department shall be submitted to the *Development Project Leader* in electronic form by the deadline. If the deadline cannot be met, the *Development Project Leader* should be contacted to identify when the comments will be received.**
8. **All comments and documents related to a case will be maintained within Permit*Plan.**
9. **All submissions to the City (plans, mylars, easement and subdivision plats, supplemental materials, electronic materials) will be submitted to the *Development Project Leader* to be routed within two working days to all applicable City Departments.**
10. **The Planning & Zoning Department will prepare and publish a written set of rules, policies and procedures for development review.**
11. **Implement customer service training for City staff. Planning & Zoning staff who are designated as *Development Project Leaders* should be scheduled for project leadership training.**

Appendix A: OVERVIEW OF DEVELOPMENT PROCESS



Appendix B: DEFINITIONS

These are some important land development process definitions:

Back End. In the development context, this refers to the post-approval process after the Planning Commission and City Council have approved a preliminary site plan.

Building Permit. Permits issued by Code Enforcement that authorizes construction to begin in conformance with approved plans.

Final Site Plan. The last set of plans which, when approved, is the basis for the approved mylars which define the buildings location, size, footprint, access, elevation, and other required zoning standards.

Front End. In the development context, this term refers to the development process from the initial concept up to the decision by the Planning Commission and City Council to approve a preliminary site plan.

Pre-Approval Process. The actions associated with the steps in a development process up to and including the decision by the Planning Commission and the City Council.

Preliminary Site Plan. The set of plans that provides adequate detail to allow the Planning Commission and City Council to make their decisions.

Post-Approval Process. All actions necessary to implement the decisions made by the Planning Commission and City Council during the preliminary site plan approval. These actions typically include, final site plan, subdivision, easements, mylars, design documents, and building permit plans.

Site plan. A process, procedure, and plan that is approved by the City to ensure that the use and development of land is undertaken in an orderly and proper manner and which makes adequate provision for the availability of public and private services and minimizes adverse impacts of development. A site plan is classified as a preliminary site plan or a final site plan.

Special Use Permit. A use that requires special mitigating considerations when located in an area where the use's impact has the potential to influence the area's quality of life as set forth by zoning standards.

Subdivision. The orderly division and recording of land for development or transfer.

Appendix C: SUMMARY OF STUDY RECOMMENDATIONS

Pre-Application Process

1. **Replace the current zoning ordinance pre-application requirements with a two-tiered conceptual review and pre-application process.**
2. **All projects with any of the following characteristics shall attend a Conceptual Review meeting, or meetings, with Planning and Zoning at least 90 days prior to formal submission of an application:**
 - **within a Coordinated Development District,**
 - **requiring a master plan amendment or rezoning**
 - **requiring a special use permit for an increase in Floor Area Ratio, density or height,**
 - **requiring a transportation management plan Special Use Permit,**
 - **proposing a parking or open space reduction,**
 - **located within an historic district, or**
 - **located on environmentally sensitive lands, including sites with Resource Protection Areas, wooded sites, or steeply sloped sites.**
3. **All applicants for all other projects seeking approval shall attend a Pre-Application Conference with Planning and Zoning and the *Development Review Team* at least 30 days prior to formal submission of an application.**
4. **To maintain flexibility in the process, the Director of Planning and Zoning shall be authorized to waive the concept review/pre-application requirement for projects that the Director determines to be insignificant with respect to their impacts or where no benefit accrues to the City from the established time limits.**
5. **A planner shall be assigned as the *Development Project Leader* for each project no later than the first Concept Review or Pre-Application meeting and shall attend all Concept Review/Pre-application Meetings for a project.**
6. **A *project-specific Development Review Team*, composed of representatives of Planning & Zoning, Transportation and Environmental Services, Code/Fire, and other departments as necessary, shall be identified for each development project.**
7. **Applicants shall provide materials for review in advance of concept and pre-application meetings.**
8. **Planning and Zoning shall provide minutes of Concept Review and Pre-Application meetings to all meeting attendees within two weeks of such meetings.**
9. **Planning and Zoning shall provide written comments on materials presented at**

each Concept Review and Pre-Application meetings within three weeks of such meetings.

10. **The *Development Project Leader* shall be solely responsible for coordinating any separate meetings between the applicant and other agencies which may occur.**
11. **Planning and Zoning shall hold a meeting with affected citizens and community groups for each major project during the Pre-Application stage.**
12. **Planning and Zoning shall appoint a point of contact to assist small business applicants throughout the development process.**

Preliminary Development Applications

1. **The interagency *Development Review Team* established for each major project shall meet to discuss each project at least once during completeness review and at least once during preliminary review; specific departmental comments will be discussed at these meetings.**
2. **The Planning and Zoning staff designated as the *Development Project Leader* shall lead all discussions of the project and shall coordinate any meetings needed between specific agencies and the applicant.**
3. **The *Development Project Leader* shall compile all comments submitted by the *Development Review Team* and prepare the final staff report.**
4. **Planning and Zoning shall prepare and publish development standards which reflect development requirements for all city agencies.**
5. **Planning and Zoning shall prepare and publish documentation of all development processes, including a document geared toward assisting small businesses through every aspect of the City's requirements.**
6. **Planning and Zoning shall publish application requirements and checklists for completeness review and preliminary review.**
7. **All City Departments shall write comments which are specific to the project being reviewed rather than generic comments.**
8. **The current time limit requirements for site plan, rezoning and master plan processing shall be modified to reflect new procedures.**
9. **The Zoning Ordinance requirement for a Site Plan Coordinating Committee**

meeting for site plans shall be eliminated and replaced with an informal meeting between the applicant and City staff where comments are provided to the applicant in advance of the staff report being published.

10. The current process of a concurrent and coordinated review of development applications and Board of Architectural Review (BAR) cases where projects are within the City's historic districts should be formalized by including appropriate BAR staff in the *Development Review Team*.

Final Site Plan Review

1. All submissions to the City—even if intended to address one specific Department's issues— shall be submitted to the designated *Development Project Leader*.
2. All submissions of final site plans shall have changes to an earlier submission redlined and shall be accompanied by a letter addressing all comments/conditions and changes.
3. All approvals related to a development plan shall be processed concurrently for final approval, including subdivisions, easement plats and vacation plats.
4. Planning and Zoning shall distribute all submissions to reviewing agencies within two days. Transportation and Environmental Services shall schedule Engineers and Surveyors Institute review within eight days.
5. First final review comments shall be provided by Planning and Zoning to the applicant within four weeks of submission of the final plan.
6. If indicated, additional *Development Review Team* meetings will be scheduled to resolve remaining issues.
7. Subsequent (post-first) final review comments shall be provided by Planning and Zoning to the applicant within three weeks of submission of the final plan.
8. Mylars shall be reviewed within one week by each agency (Planning and Zoning and Transportation and Environmental Services).
9. Planning and Zoning and Code Enforcement staff shall prepare Critical Flaws Checklists for use in the Engineers and Surveyors Institute process and shall attend the critical flaws portion (Stage I) of the Engineers and Surveyors Institute meetings.
10. The Planning *Development Project Leader* shall attend the Stage II (Detailed

Engineering Review) Engineers and Surveyors Institute review meetings for their projects to the extent feasible.

- 11. The City shall promote pre-release of portions of site plans and Planning and Zoning, in coordination with Transportation and Environmental Services and Code Enforcement, shall publish specific procedures for the pre-release of portions of final site plans.**
- 12. The City shall allow release of final site plans where details related to landscaping or architecture (including screening) remain to be worked out.**
- 13. Engineers shall submit bond estimates on a sheet of the final site plan, and clear procedures for the bonding process shall be developed by Transportation and Environmental Services and published by Planning and Zoning as part of overall development procedures, though changes could occur over time.**
- 14. The notice requirements for final site plans within a Coordinated Development District shall be eliminated.**
- 15. Permit*Plan, the City's electronic permit tracking software, shall be utilized by all City agencies to submit comments to Planning and Zoning and to sign off on final plans and any pre-releases of final plans.**

Building Permits

- 1. Planning and Zoning shall concurrently review building permits with final site plans, commencing no sooner than after the first final review of the site plan.**
- 2. The City's permit tracking system shall be modified to incorporate tracking of permits within agencies.**

Citizen Participation Process

- 1. Establish formal policy and practice of scheduling community meetings on potential development projects after the staff determines that it meets minimum legal requirements but before an application is formally filed.**
- 2. The developer shall be required to provide and maintain physical notice on the**

property once an application is submitted. The posting shall include the dates of any required hearing. The requirements for the legal notice to adjoining property owners shall continue to be the responsibility of the applicant. The developer will submit an affidavit to the Planning & Zoning Department stating that the posting was installed and has remained on the property until the date of public hearing. The specifics of the posting shall be clearly defined in the Planning and Zoning rules of procedure recommended by this study and will require a zoning text amendment. The earlier posting of the property will enable the adjoining residents to be aware of a project earlier in the development review process.

3. For major development projects or those projects that may have significant impact on neighborhoods, the Planning and Zoning Director can authorize the *Development Project Leader* to schedule a community meeting on the proposed development during the preliminary development review process.
4. At any time during the application review process, written comments from citizens should be encouraged.
5. Development applications and plans shall be made available at the front counter of Planning and Zoning. The list of development applications shall be available on the City's web site and be made available to those who answer the main numbers in City Hall.
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7. Planning and Zoning staff should use the City's Office of Citizen Assistance list of Citizens Associations to notify appropriate citizen groups of scheduled meetings on development proposals. The citizen organizations will be responsible for keeping the list up-to-date by notifying the City of any changes. It is the intent that the individual organizations, once notified, will ensure that individual residents or other affected groups will also be contacted by the citizens organizations.
8. Planning and Zoning shall prepare a community outreach plan to inform the community of the new development review policies and responsibilities. The outreach program will also provide an opportunity to establish a better working relationship between City staff and many of the resident organizations. The outreach plan at a minimum shall include meetings with the community, handouts and the use of the City's web site. Full implementation of such a plan may require additional staff resources.

Staff Coordination & Resources

1. **The Director of Planning & Zoning will appoint a *Development Project Leader* for each development application. The role of the *Development Project Leader* will be to ensure the efficient coordination of applications throughout the process by means of the *Development Review Team* with members from each Department with responsibility to comment on an application, and to ensure effective transitions of applications from Departments as applications proceed through the conceptual, preliminary, final and building permits review process.**
2. **The *Development Project Leader* for each project will be the person of contact for the applicant and will coordinate all meetings with the applicant for the City; be responsible to notify all affected Departments; and establish and maintain a record of all comments.**
3. **Transportation and Environmental Services and Code Enforcement, and other departments as appropriate, will designate a lead staff person for each major development project as a member of the *Development Review Team*. This person will represent the Department at all meetings on the specific project. The staff representative from each department will be authorized to make decisions for his/her department regarding site plans and processing.**
4. **Establish a senior-level *Development Overview Committee* to ensure interdepartmental cooperation in the development process.**
5. **To enhance City staff review of site plans, the applicant for each and all development applications will be required to submit all preliminary and final plans in digital form(CD-ROM) that will be readable by ArcInfo2000. The primary staff responsible for site plan review within each Department (Planning and Zoning, Transportation and Environmental Services, and Code Enforcement) will receive the additional training that may be necessary.**
6. **Cross-training for their staff should be initiated by each Department to ensure that the absence of an individual person will not delay the overall review or approval process.**
7. **Completeness, preliminary and final review comments by each Department shall be submitted to the *Development Project Leader* in electronic form by the deadline. If the deadline cannot be met, the *Development Project Leader* should be contacted to identify when the comments will be received.**
8. **All comments and documents related to a case will be maintained within Permit*Plan.**

9. **All submissions to the City (plans, mylars, easement and subdivision plats, supplemental materials, electronic materials) will be submitted to the *Development Project Leader* to be routed within two working days to all applicable City Departments.**
10. **The Planning & Zoning Department will prepare and publish a written set of rules, policies and procedures for development review.**
11. **Implement customer service training for City staff. Planning & Zoning staff who are designated as *Development Project Leaders* should be scheduled for project leadership training.**

WS

4-23-02

Development Review Process

Analysis and Recommendations

City of Alexandria

City Council Work Session

April 23, 2002



Outline of Presentation

- Study Background
- Issues Identified
- Study Recommendations
- Summary



Purpose of the Study

- ◆ Ensure higher quality development City-wide
- ◆ Provide greater citizen participation
- ◆ Streamline the entire process
- ◆ Provide certainty and clarity for applicants and public

Process

- Series of interviews were held with:
 - ◆ City officials and City staff
 - ◆ Engineers, builders, developers, attorneys
 - ◆ Alexandria Chamber of Commerce
 - ◆ Citizen groups and their representatives
- Comprehensive comparison assessment of other jurisdiction processes

Issues Identified - Applicants

- The entire development process takes too long – especially the back-end
- There needs to be better internal City coordination
- Consider concurrent processing of permits
- Applicants need more certainty about City processes and standards
- There is no single point of contact for information or status
- Small businesses need special assistance

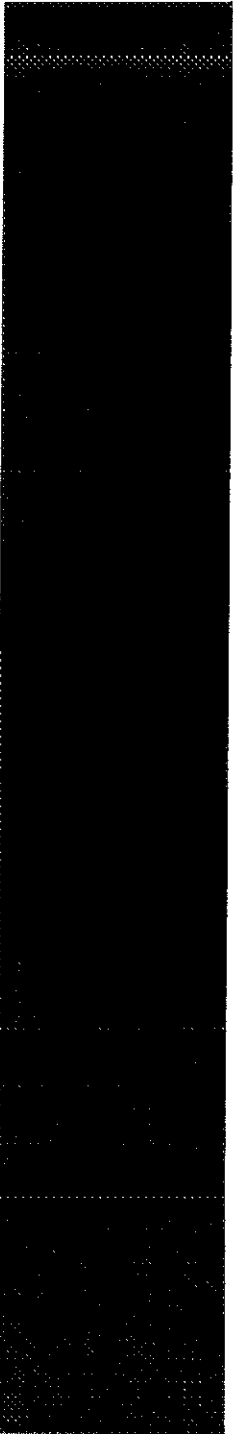


Issues Identified - Citizens

- The development process is too rushed with not enough opportunity for citizen input, especially in the early stages of the process.
- Lack of a mechanism to have the City, citizens, and developers concurrently address important issues and concerns.
- Lack of a clearly defined central point of contact in the City for information.
- Failure to consistently achieve high quality projects

Issues Identified - City

- Additional review time needed at the beginning of the process – would reduce inconsistencies and processing time later in the process
- Need improved coordination between agencies at the front-end
- Need clearly defined procedures/standards to ensure success of process



The recommendations that follow
seek to address the issues raised

Structural Changes to Review Procedures

■ Front-end

- ◆ Provide adequate time for early staff review in the process through concept review & pre-application meetings.
- ◆ Clear procedures for early identification of issues and timely responses.

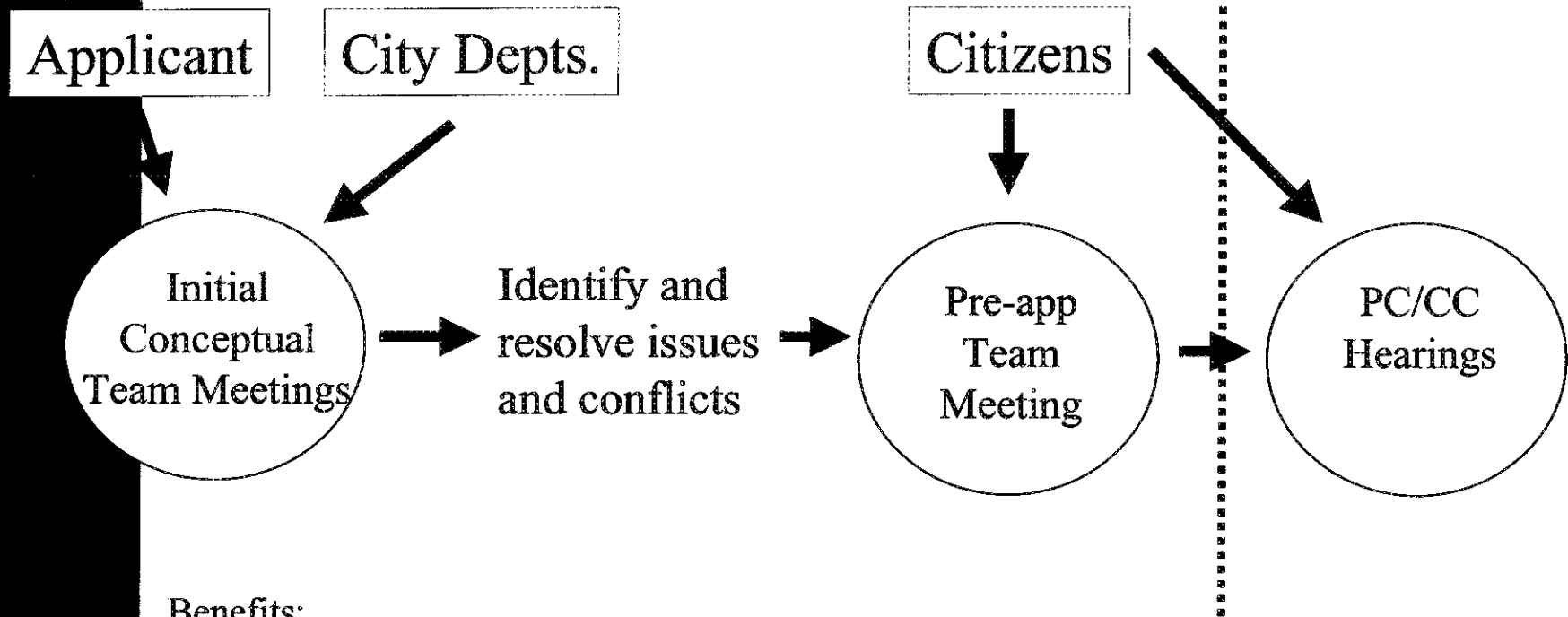
■ Back-end

- ◆ Streamline through increased concurrent processing (building permits and final site plans).
- ◆ Tighter procedures, turn around time limits, reduction in back-end response time.
- ◆ Formalize pre-release of certain plan elements, e.g., grading plans.

Improvements to Internal Coordination

- Implement a team-oriented approach to development review at onset of project
 - ◆ Standing Development Overview Committee
 - ◆ Project specific Development Review Team
- Development Project Leader, identified by P&Z, coordinates review of each project.

Project Team Approach



Benefits:

- Opportunity for developer to meet with all City Departments at one time
- Issues identified early in the process
- Necessary changes can be made prior to formal plan submission
- Limit number of “bites at apple”
- Minimize conflicting conditions that require significant changes
- Reduce time for overall process



Improvements to Citizen Participation

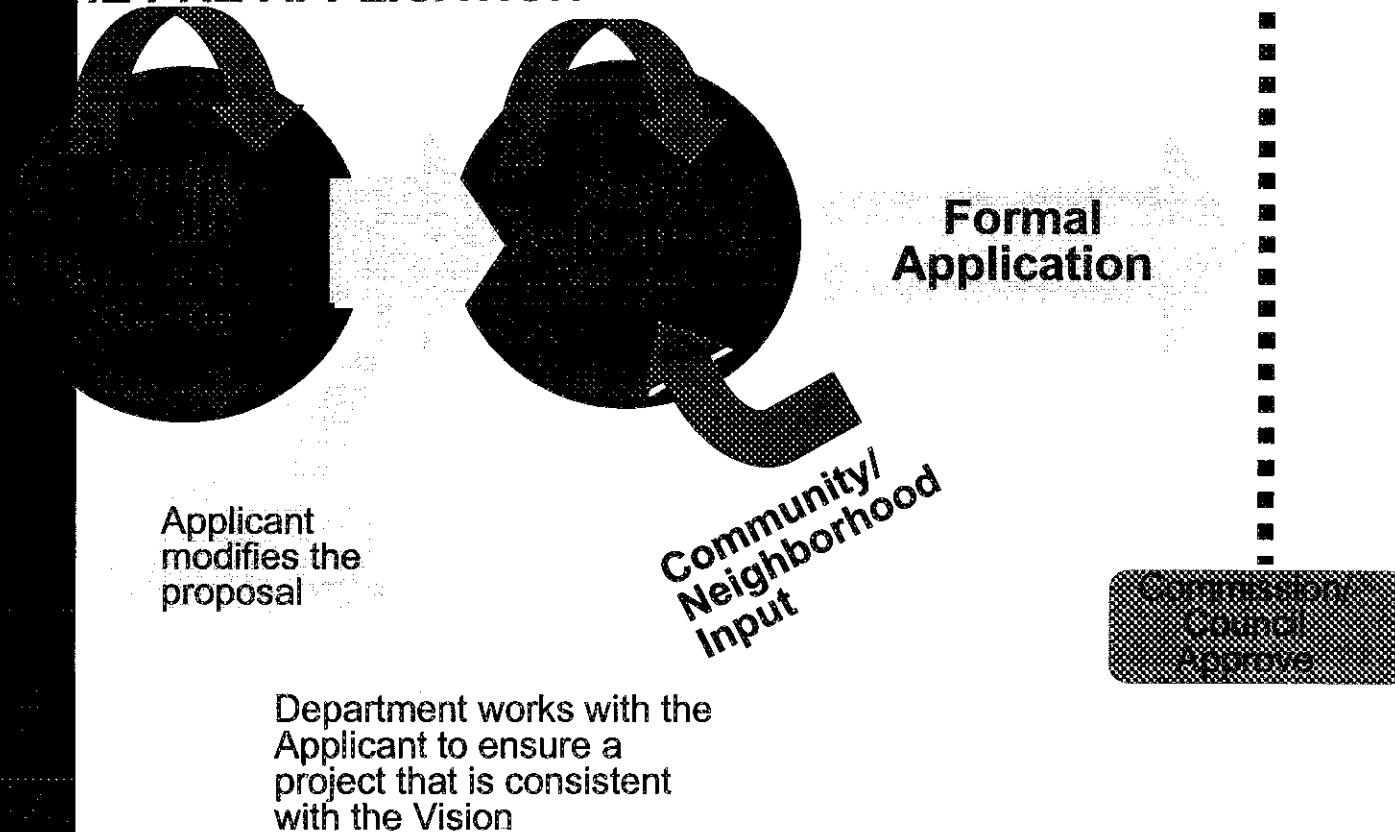
- Provide opportunity for citizen participation prior to submission of formal development applications.
- Provide easy access to development information through the Development Project Leader.
- Actively involve citizens in long range planning efforts to shape vision for the community
- Develop guidelines with community to implement vision

Progress to Date

- The development review process has focused on addressing issues earlier in the process
- Internal review procedures are being overhauled to improve interagency coordination. Project teams are jointly evaluating applications.
- A clear person for contact in planning department is established
- Time and number of issues in the back-end of the process are being reduced
- Improved outreach to the community
- All those interviewed agree that additional improvements are necessary

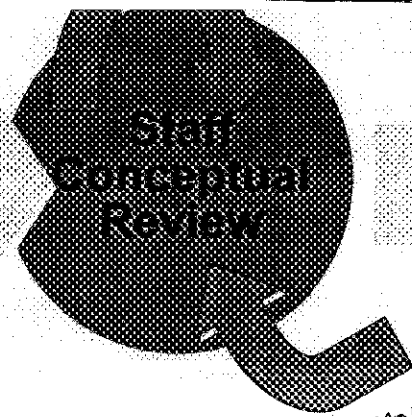
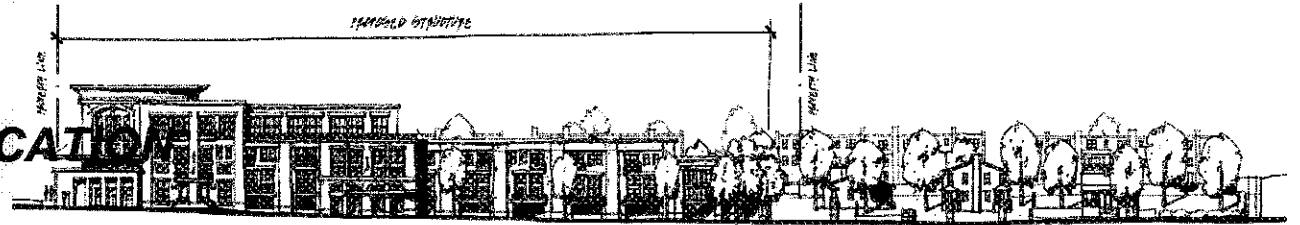
The Interim Development Planning Process

THE PRE-APPLICATION



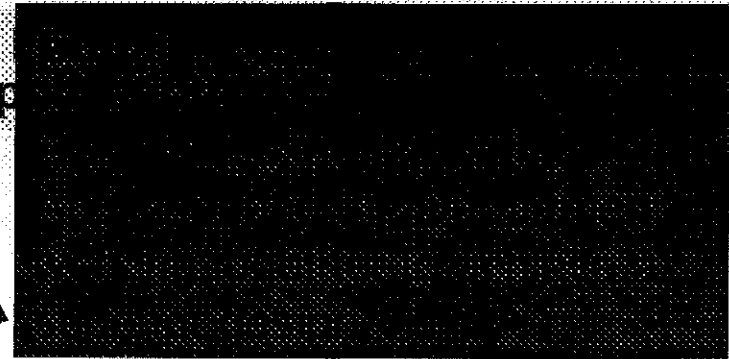
The Development Planning Process

THE PRE-APPLICATION



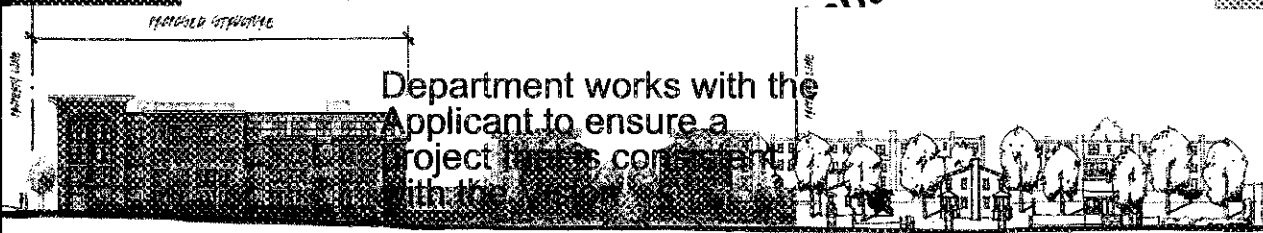
Applicant modifies the proposal

Community/Neighborhood Input



Commission/Council Approve

Department works with the Applicant to ensure a project that is compliant with the zoning



Garrett's Mill



- Reduce units
- Break up roof and building lines
- Preserve street trees
- Height step down to adjacent townhouse

Planning Efforts, Document Standards, Guidelines, and Development Procedures

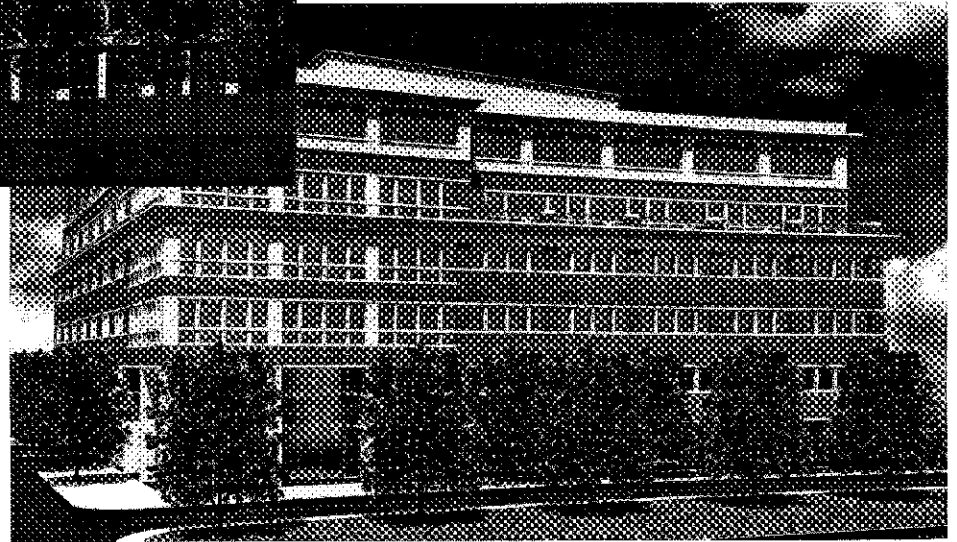
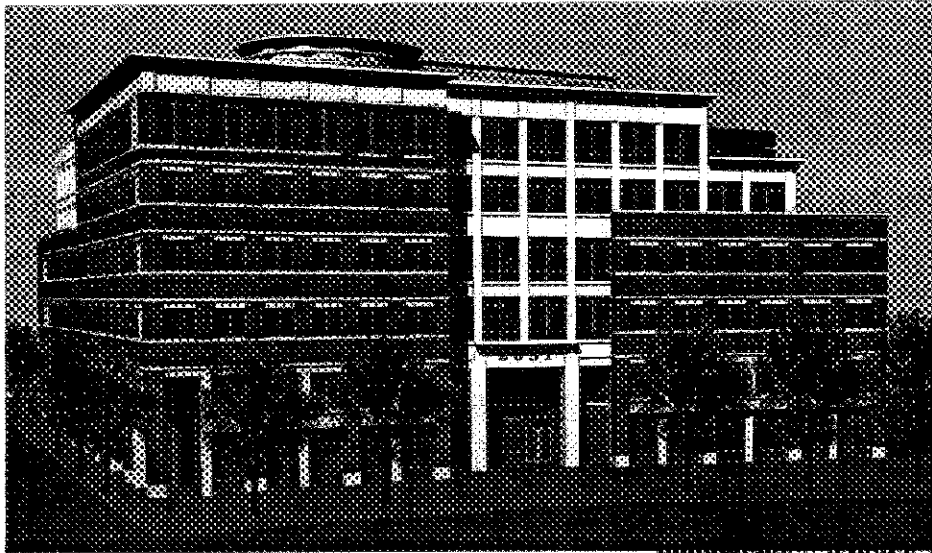
■ Immediate Activities

- ◆ Prepare clear guidelines for the development review process, including the responsibilities of each department
- ◆ Provide a point of contact for small business assistance within the planning department to shepherd applications through the process

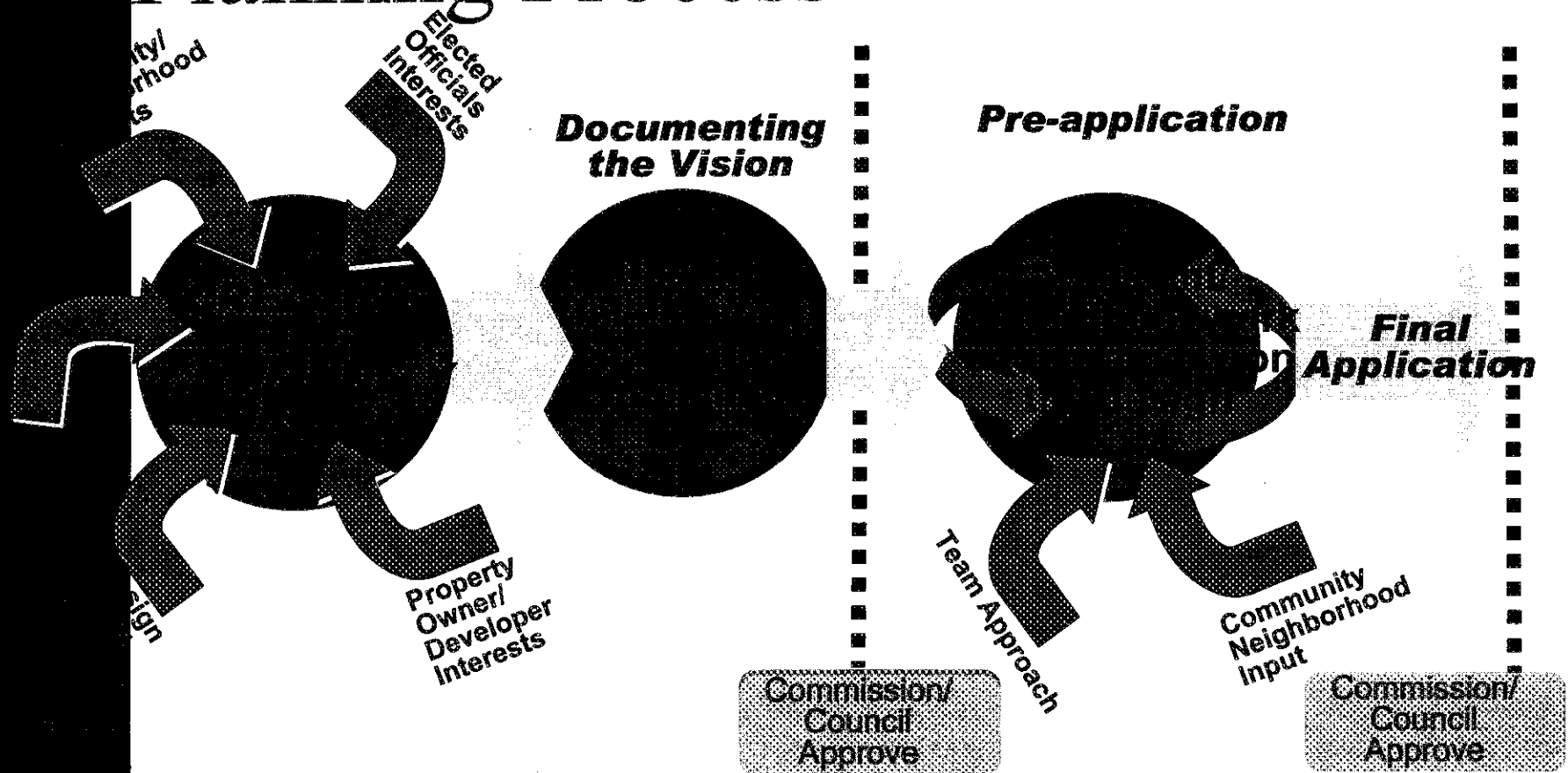
■ Future Activities

- ◆ Provide clarity/certainty through implementing Plan for Planning
- ◆ Prepare a manual of development standards/guidelines to reflect community vision

Carlyle Court



The Future Development Planning Process



Community works together to
with the Community

Department creates
development & design
standards to implement
the vision

Department works with the
Applicant to ensure a
project that is consistent
with the Vision

Summary

- ◆ Clear expectations for the City, residents, and developers established
- ◆ A higher quality development product
- ◆ A reduction in the overall time for processing development applications (especially back-end)
- ◆ Partnership with City, developers, and residents through participation in the planning process