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City Manager's Office

29

TO: Mayor and City Council

FROM: Bob Kindred, Assistant City Manager

DATE: August 20, 2010

SUBJECT: Development Review Committee Process Improvement Report

Since the beginning of this year, a number of efforts have been underway to strengthen the City's support of economic development. This includes specific goals and objectives set by Council early in 2010, a Council round table on April 20 to solicit input from the development community, and an internal review of ways to improve our development review process.

Staff's Development Review Committee (DRC) utilized a "process improvement team" model that has been employed to improve output in many other areas across the organization. Their work was completed in July, and will be implemented over the coming months. The team's conclusions closely support the following goals and objectives from your 2010-11 goals:

- Promote economic development
- Further streamline and improve government processes
 - Work to make City Council meetings and City processes more efficient and effective
 - Promote Ames as a welcoming place to do business by embracing a "can do" attitude

Because of the close connection between their report and your goals and objectives, we have asked team members to present an oral summary of their work to Council. The attached report is not presented for Council approval, but as a summary of steps the DRC will take, based upon customer input, to facilitate development in our community.

You may recall that three general areas for improvement were identified at the April 20 Council round table: Improving attitudes, improving processes, and changing codes. This report addresses the first two areas. Staff will bring you options for code changes at a later date.

DEVELOPMENT REVIEW COMMITTEE PROCESS IMPROVEMENT TEAM REPORT

August 24, 2010

Level 1 Team

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CITY OF AMES STAFF ECONOMIC DEVELOPMENT MISSION

Help our current and prospective residential, commercial and industrial citizens to grow or expand within the City of Ames with the goal of improving the quality of life for all of our residents.

Promote Ames as a welcoming place to do business by embracing a “can do” attitude.

Many departments, programs, and staff of the City carry out this mission in many ways every day. During the planning and design of physical development, over 20 City staff members in eight departments are involved. The Development Review Committee (DRC) was formed over 20 years ago as a one-stop shop: development customers would not have to contact and work with each member of the City staff individually. This committee brings City staff together to work with developers, designers, owners, and contractors on all of the physical development in the city.

PURPOSE OF THE DEVELOPMENT REVIEW COMMITTEE

To work unitedly as COA staff to help development happen in accordance with Council's approved codes and plans. To accomplish this, we will:

- *Help customers feel our “can do” attitude*
 - *“How To, not Why Not”*
 - *“They made me feel like they were on my side”*
- *Provide approvals & direction from one source to minimize customer's inconvenience dealing with multiple departments*
- *Assure complete, timely, consistent answers from City staff*
- *Lean towards the applicant's proposal if there is not a clear, code-based reason not to do something*
- *When needed, help identify alternative ways that their projects can work*

Beginning in December 2009, these staff members have worked to identify improvements to the way they accomplish the above mission and purpose, in short to transform the Development Review Committee, or “DRC,” to exude “Excellence Through People” and support the City Council's goal of economic development and their objective of promoting Ames as a welcoming place to do business by embracing a “can do” attitude.

TOTAL CITY PERSPECTIVE

PROCESS IMPROVEMENT MODEL

The City of Ames uses a Process Improvement Model in order to continuously improve how it provides service to the City's customer, within a team environment. The model is adapted and applied to a wide variety of processes and always involves people very familiar with the work and trained facilitators, called the "Process Improvement Team." The beginning step for any Process Improvement Team is a Team Charter, which defines and guides the Team's work. The Team Charter for the Development Review Process Improvement Team states the following purpose:

*Review the DRC process (first contact - final determination) and identify improvements to better accomplish the DRC's mission and purpose. Transform DRC to "**exude Excellence Through People.**"*

The following steps were followed:

Identify opportunities for improving the development review process

- Review input previously received from customers
- Facilitators conduct two customer input sessions
- Staff input

Identify and analyze how opportunities can be met

- Detailed mapping of the Development Review Process to understand the flow of information, how everyone is involved to identify waste, bottlenecks and opportunities for improvement
- Review codes and standards, information packets, communications, checklists and other document used by the customers and the staff
- Benchmarking from how other communities in Iowa and elsewhere review development
- Compile opportunities and apply them to specific steps of the process map

Proposals for improvements

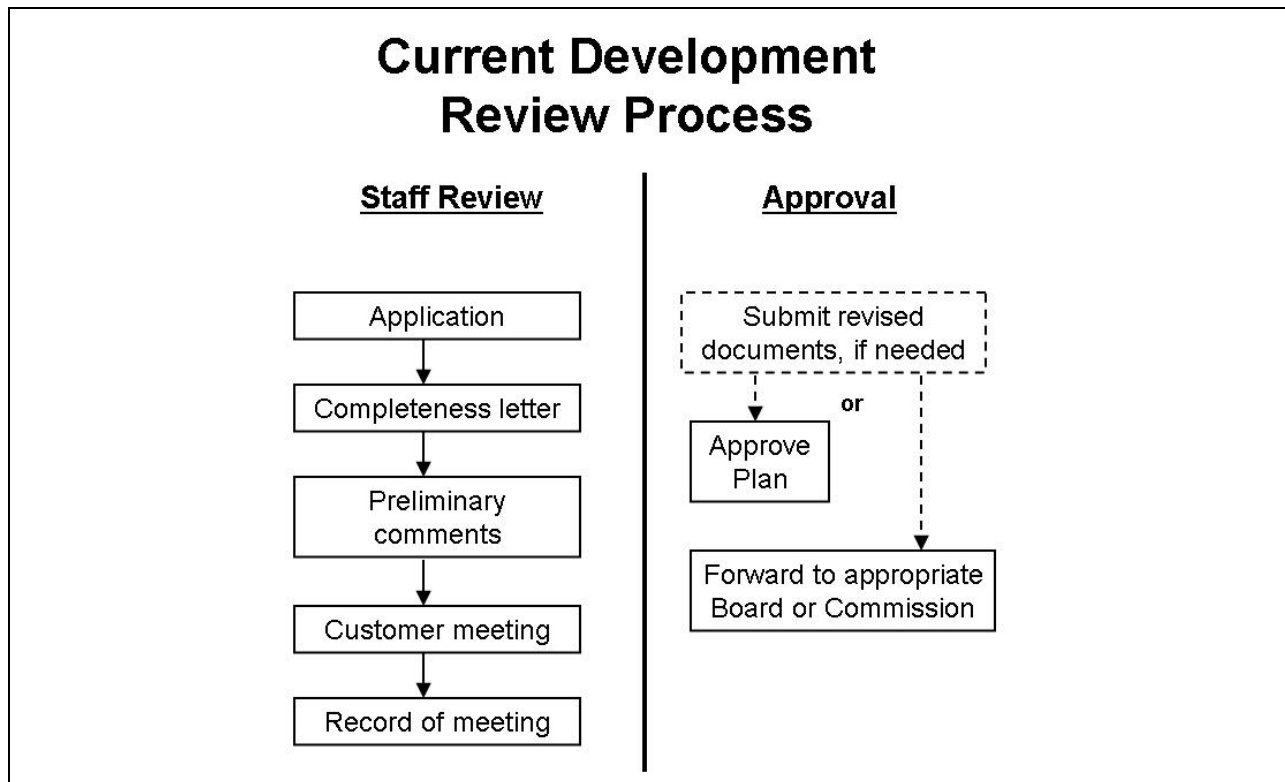
- Prepare major improvements to the Development Review Process
- Identify anticipated benefits based on opportunities for improvement identified by customers and staff
- Present proposals to customers for feedback

Implementation

- Revise proposal based on feedback
- Prepare implementation steps
- Report recommendations to City Manager and City Council

DEVELOPMENT REVIEW PROCESS

The first step was to diagram how these 20 people in eight departments coordinate to carry out development review. The customers provide information that is shared by members of the DRC. DRC members consider the project with respect to their areas of expertise and the city codes, standards and policies that they are charged with implementing. DRC members coordinate with each other and with customers to develop consistent with the City's codes and plans. The large and complex DRC Process Map that describes this "internal workings" can be reviewed upon request. It is simpler from the customers' perspective:



By the above "Staff Review" process, the DRC provides information and recommendations so that decision-makers can determine that projects will be consistent with City plans and codes, the "Approval" steps above. The DRC provides this support for the following types of approval:

Minor Site Development Plan
Major Site Development Plan
Master Plan
Final Plat
Preliminary Plat
Special Use Permits
Conditional Use Permits

Approval by Director of Planning and Housing
 Approval by City Council
 Approval by City Council
 Approval by City Council
 Approval by City Council
 Approval by Zoning Board of Adjustment
 Approval by Zoning Board of Adjustment

CUSTOMER INPUT

Input from external and internal customers was invited several times during the process improvement review. Two focus group sessions were conducted for external customers, one for developers and one for consultants. The process improvement facilitators led participants at each of these sessions through a series of questions to identify opportunities to improve the DRC process. In order for customers to feel comfortable making direct and candid comments, DRC members were not present at these focus groups.

Input from DRC members came through an issues and problems brainstorming session, through departmental meetings, through discussion of the Level 1 Team, and through numerous one-on-one discussions throughout the process.

Nearly 240 comments were received in all, which are grouped and summarized below as opportunities for improvement. An appendix to this report contains a more detailed summary. Records of each input session are also available.

Summary of Opportunities for Improving the DRC Process

Conduct the DRC process with a **mind set or attitude** to help development to happen by providing much more help, dialogue, options, direction, guidance, support and cooperation toward what is needed for the projects to be approved and proceed with minimal delays. *(Most of the comments from external customers were in this category)*

Interpret codes in a manner that is predictable and consistent from one similar project to the next, and from the first step of project planning to the last, that makes common sense.

Improve **response time** between application and review, between review and issuing comments to the customer, between plan revisions and staff reply, and in response to all contacts generally. Make processing time more predictable and consistent.

Resolve various **process issues**, including clarifying requirements and review comments, coordinating various codes and policies, and conducting a customer meeting that is efficient, productive, and provides a clear path to approval.

Be **consistent** in how to meet standards and provide a uniformly excellent level of service to customers.

Be **flexible** in reviewing plans and applying requirements to each situation, lean toward approval when there is no clear reason to deny it, thereby encouraging customers to ask questions and communicate fully.

PROCESS IMPROVEMENTS

The test of success in improving the mind set or attitude of the Development Review Committee is in the results as perceived by the customers; they will know it has happened when they see the results. This one measure will also reflect the success of all of the other improvements that the customers proposed.

However, it is difficult to describe how an organization will improve its mind set or attitude. The process improvement team concluded that changing how City staff carries out the steps of the DRC will improve the mind set and attitude better than making major changes to the process itself. These changes are grouped in the following categories:

- Kickoff Meeting
- Improve Responses
- More Effective Meetings
- Resolving Conflicts
- Improve Performance Tracking and Quality Control

Each of these improvements is described generally, along with the benefits that the process improvement team anticipates will result. Then the implementation actions are listed, which is the work needed to carry out the improvements.

All DRC members are committed to the following improvements and to the purposes of the DRC process in carrying out the economic development vision of the City.

Kickoff Meeting

The Kickoff meeting will be established as the first point of contact for a proposed project. The purpose will be two-fold:

1. First, to set a positive tone throughout the whole project, start-to-finish, which will be that City staff will commit to help the customer to make development happen in accordance with the City Council's approved codes and plans.
2. Second, to gain first-hand understanding of the project from the customer's perspective. This in turn will provide the opportunity to create a more complete review, in a timelier manner, without the need for multiple iterations.

Anticipated Benefits:

- Begins dialogue about a project/piece of property before significant investment is made (e.g., purchasing the property or hiring design professionals).
- Opportunity to listen to customer's vision, intent, and concerns for the project, before any reviews begin.
- Opportunity and time for responses, dialogue, direction leading to approval.
- Gain clear understanding of code/zoning requirements up front; more time for code research.
- Opportunity for creative approaches (i.e. brainstorming, identifying alternatives) for challenges specific to a project.
- Fewer issues to resolve at the end of the review, reducing delays.
- Identify review processes, possible schedule, application materials, and information sources for specific project.
- More opportunities to help development happen.

Implementation Actions:

1. Before the meeting, the customer will be asked to provide very brief information about the project or proposal to be considered at the Kickoff Meeting.
2. The Kickoff Meeting will be most useful if it is early in the planning process. This can be even before consultants begin work on the design of the project.
3. Because initiating a project with a "can do" attitude is so important to the DRC purpose, staff will be available at a set date and time each week for Kickoff meetings. When requested by the customer, an appointment can also be set for other time.
4. This meeting is not a required part of the approval process, but will be encouraged to promote more effective collaboration between the City and the customers.

Improve Responses

City staff will provide review comments by 5:00 p.m. two business days before the customer meeting and a written record of the customer meeting by the end of that day. City staff will accomplish this by making better use of the time available in the existing review schedule to discuss issues, coordinate review with discussion at the kickoff meeting, identify options that will help the development happen, and make clear review comments.

Anticipated Benefits:

- Develop options that can lead to approval
- More complete and coordinated review comments
- Resolve issues before customer meeting
- More consistency of code interpretation throughout project.
- Increases customer's ability to respond and maintain project schedule.
- More predictable process; less uncertainty.
- Opportunity to identify inaccuracies in the record or communications.

Implementation Actions:

1. Assign one planner to project from start to finish, depending on timing, work load, staff schedules and requirements of the project.
2. Make completeness requirements more consistent: application form, *Municipal Code*, staff needs, and what's available.
3. Upon request, review completeness of applications with customer.
4. Distribute plans as soon as an application is found to be complete.
5. Well in advance of the staff DRC meeting, staff records comments in a central digital file. Each staff member reviews these comments and discusses any questions or comments with the staff member who made the comment. This dialog should include impacts of proposed revisions to meet one requirement on other requirements, and any other questions and comments.
6. Establish written guidelines for how the comments are stated, based on:
 - a. purpose of the review at this stage
 - b. action we desire the customer to take when he/she gets the comment
 - c. the audience we are writing for
 - d. the attitude expressed by the comment
 - e. "Footsteps" or other guide for City communications
7. Workshops for all DRC staff focused on writing comments.
8. Establish methods for continuing monitoring of the writing and continuing education.
9. For consistency, departments use checklists and boiler plate comments.
10. Move the staff DRC meeting to begin at 8:30 a.m. on Wednesday.
11. Determine final wording of review comments at staff and customer DRC meetings
12. Do regular plus/delta on comments.

More Effective Meetings

City staff will conduct the customer meetings to be more efficient and productive. City staff will be assigned to facilitate each customer meeting and to make a complete record of conclusions and agreements made at the meeting.

Anticipated Benefits:

- More consistent follow-through on commitments.
- More productive customer review meeting to use customer's time better.
- More predictable outcomes from meeting.
- Customer meetings focused on resolving issues and approval of projects.
- City staff will establish and maintain a positive, helpful attitude.
- Respectful and consistent protocols for customer meetings.
- Encouraging conversation among customers and staff.
- Answers will be provided to the customer at the meeting or a clear path to the answers will be provided.
- More useful documentation of customer meetings.
- More flexibility on how development can meet Council's approved goals and plans.
- Clearer guidance on what is needed for project approval.
- Better help and direction for development to happen.

Implementation Actions:

1. At DRC staff project review meeting, plan for customer meeting, such as:
 - a. Which staff will attend customer meeting
 - b. Overall purpose of customer meeting, (e.g., discuss issues or tell customer what needs to be revised for project approval)
 - c. Agenda for customer meeting
2. Establish a DRC Facilitator position to conduct the customer meeting. An existing City staff person with good facilitation skills from outside the DRC should be assigned to be DRC Facilitator for one year to establish the tone, procedure, and standard agenda for these meetings that is consistent with the purpose of the DRC. After that year, one of the DRC members may carry out this facilitation role. *(See "Roles and Responsibilities" section)*
2. Establish a DRC Scribe position to make a record of the meeting (see #19 below). The City staff person assigned to be DRC Scribe may be chosen from the existing DRC members, or may be a staff person from outside the DRC. Consider rotating the Scribe position from one DRC member to another, but maintain consistency in the way the comments are written. *(See "Roles and Responsibilities" section)*
3. Establish ground rules for the DRC.

4. Maintain a welcoming environment and respect for the customer in a manner that helps the customer to feel at ease in asking questions and offering new ideas or approaches.
5. Maintain a positive “Can Do” attitude by City staff.
6. Emphasize understanding the needs and desires of the customer, and finding ways to accommodate those needs and desires.
7. Maintain respectful and professional conduct by all staff.
8. Maintain open communication between all in attendance and encourage a problem-solving approach resulting in solutions for the customer.
9. Support other DRC members in their professional analysis of development proposals.
10. Inform waiting customers of meeting progress and do what is necessary to keep the meeting on schedule to the extent possible.
11. Share information, knowledge, and past experience openly and honestly with the customer and other DRC members.
12. Be flexible in the administration of codes and policies to the extent possible, but always within the limits of authority given for the particular position within the City of Ames organization.
13. Identify, discuss, and begin the process of resolving conflicts between Code standards and City policies at, or before, the internal DRC meeting, prior to meeting with the customer.
14. If necessary, inform the customer of the need for and procedure to be used by City staff to resolve conflicts between codes and policies and a timeline for resolution.
15. Establish clear agreements and understandings between the customer and City staff.
16. Identify responsibilities of City staff and the customer(s) to perform tasks necessary to meet dates that are identified during the meeting for approval, or the next steps leading to plan approval. Make this part of the agenda for every customer meeting.
17. Measure success based on achieving products and outcomes of the DRC as a team, not as individual departments.
18. Keep commitments made in the meeting to follow-up on questions, identify alternatives for approval, and resolve issues.
19. Provide the customer a clear, accurate written record of all review comments and agreed-to responsibilities and deadlines for next steps leading to plan approval.
20. Conduct a “Plus/Delta” at the end of every customer meeting, after the customers leave. Offer and receive constructive criticism from fellow DRC members in an open and respectful manner. *(Note: The City Council has assigned the City Manager to also establish a more effective surveying technique to receive customer input about the City’s development process. He is currently developing a new Survey Monkey tool to help accomplish this.)*

Resolving Conflicts

The City will establish a Policy Resolution Group (PRG) to resolve conflicts between different codes, standards, and policies. This group will be made up of decision makers and will provide resolutions for issues the DRC group cannot easily make. They will also help provide support for possible code or policy changes that may be needed. This group will not hear or decide on any appeals or variances.

Anticipated Benefits:

- Resolves conflicts among City requirements with minimal impact on development.
- Easier resolution of issues DRC staff cannot resolve.
- Support of City staff leaders to help development happen.
- Follow-through on commitment to help development happen.
- Increases flexibility in interpreting requirements.
- Specific guidance for staff approval.
- Clear basis for future staff decisions.
- Greater consistency in application of codes and standards for future projects.
- Speeds up the time it takes to resolve conflicts.
- Identifies conflicts that require code changes, thereby reducing repeat issues of conflict.
- Better help and direction for development to happen.

Implementation Actions:

1. Establish the PRG consisting of Department Directors from Planning, Public Works, City Manager's Office, Electric, and Legal. Involve Fire and Water and Pollution Control as needed.
2. Establish ground rules, policies, and meeting schedule of the PRG. Place a high priority on resolving issues quickly.
3. Establish methods for reviewing and deciding on conflicts and for interpreting ordinances.
4. Initiate changes to ordinances, standards or policies
5. Review Performance Tracking measures to be proactive in resolving internal conflict.

Improve Performance Tracking & Quality Control

The City will collect and analyze data regarding project submittals to monitor DRC staff performance during plan review process. Information will be used to improve staff efficiency in providing complete and timely comments to applicants. Code sections that are confusing to applicants or commonly misunderstood will be identified for improvement.

Data to be collected and analyzed will include:

- Number of calendar days in the process (City days and Applicant days).
- Number & type of comments for each submittal.
- Number of “incomplete or new” staff comments after first submittal.
- Number of repeat comments.
- Number of times plans need to be revised.

Anticipated Benefits from Using the Performance Data:

- Identify where codes need to be more flexible.
- Reduce need for revisions and resubmittals, reducing time to get approval.
- Reduce repeat issues of conflict.
- Reduces customers' time spent in dealing with the same issues repeatedly.

Implementation Actions:

Planning staff will collect the data. DRC and PRG will analyze the data quarterly for the following purposes:

1. Establish benchmark data points to gauge future performance
 - a. Analyze existing data to see if it applies (see below for sample).
2. Use data on ‘days in process’ to make process more predictable by:
 - a. Providing more accurate estimates of length of ‘process time’ to applicants for scheduling purposes.
 - b. Keeping projects “on schedule.”
 - c. Identifying frequent delays.
 - d. Responding more quickly to questions or issues.
3. Track number and type of comments per department in order to:
 - a. Coordinate comments so changes by one department don’t create additional comments by another department.
 - b. Reduce number of late or missing comments.

4. Tracking number of repeat comments could indicate:
 - a. Need to clarify Codes or departmental requirements.
 - b. Need to make requirements more flexible.
 - c. Conflicting requirements for Policy Resolution Group to consider.
 - d. Opportunity for standard plan note or condition of approval.
5. Make 'select' data available on-line to applicants and public for review:

STATUS REPORT

Case File #:	Case Planner:		
Project Name:	Type:		
Address:			
	Date	City Days	Applicant Days
1. Application Submitted			
2. Application Deemed Complete			
3. Staff DRC Meeting (Wednesday)			
4. Staff DRC Meeting Comments Sent			
5. DRC Meeting (Friday)			
6. DRC Meeting Comments Sent			
7. Waiver of 31-day Review			
8. Applicant Resubmittal			
9. Staff Comments on Resubmittal			
10. Applicant Resubmittal			
11. Staff Comments on Resubmittal			
12. Applicant Resubmittal			
13. DRC Approval			
14. Planning & Zoning Commission Meeting			
15. Historic Preservation Commission			
16. Zoning Board of Adjustment Meeting			
17. City Council Meeting Date			
18. Stamped "Approved" Plans			
Calendar Days in Process			
Total Calendar Days in Process			
Comments:			

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ROLES & RESPONSIBILITIES

DRC Member

Role: *The DRC Member is to work in a united approach with all other DRC Members to help development happen in accordance with the codes and plans adopted/approved by the City Council. A “Can Do” attitude is essential to perform the work of the DRC Member. Complete, timely, and consistent answers and direction for the customer are expected. If there is not a clear, code-based reason not to do something, the DRC Member is to make the decision that favors the customer’s development proposal. Options/alternatives to code requirements and City policies are to be identified by the DRC Member in an effort to find ways that the development project can be approved. The customer’s inconvenience is to be minimized by receiving direction and approvals from one source, the DRC.*

Responsibilities:

- Follow ground rules adopted by the DRC.
- Always be mindful that the DRC is a group of professionals working together to achieve the common goal of helping development to happen.
- Maintain a high level of professional competence and personal conduct in performing all job duties.
- Schedule time to review development plans, as received from the Department of Planning and Housing.
- Conduct a review of development plans for each customer that is accurate, comprehensive, efficient, effective, reliable and timely.
- Be accountable for your work.
- Share information, knowledge, and experience openly and willingly with the customer and all other DRC Members.
- Be flexible in the administration of codes and policies to the extent possible, but always within the limits of authority given for the particular position within the City of Ames organization.
- Work as a problem-solver in a solutions-oriented manner.
- Coordinate with development review comments of other DRC Members.
- Consistently support all other DRC Members in their professional analysis of the development proposals.
- Measure success based on achieving products and outcomes of the DRC as a team.
- Actively participate in DRC discussions and decisions.
- Record development review comments in electronic written form prior to the deadline for the staff DRC meeting.
- Communicate directly with the customer and/or the customer’s representative for clarifications needed and questions concerning the development proposal.
- Keep the Case Planner current with the status of plan review and communications directly with the customer and/or their representative.

- Communicate development review comments constructively to the customer at the external DRC meeting.
- Participate in a “Plus/Delta” at the end of each DRC customer meeting, which includes a discussion of performance by team members to follow ground rules and to be accountable for their actions and responsibilities.

Case Planner

Role: The Case Planner is assigned by the Planning and Housing Director to serve as the lead City staff representative for the particular development proposal. The Case Planner is the common contact point on each case for the customer and DRC members. This is the Planner in the Department of Planning and Housing that conducts a comprehensive review of the development proposal to determine compliance with zoning and subdivision regulations and other applicable land use regulations and policies. The Case Planner works closely with the Planning and Housing Department Secretary on all schedules and correspondence with the customer, and/or their representative. All other DRC members provide review comments to the Case Planner to be included in a detailed comprehensive list of plan review comments for the customer that provides direction on changes to proposed plans, and/or additional information that is needed for approval of their request. The Case Planner works in conjunction with the Planning and Housing Director to finalize approval of Minor Site Development Plans, and serves as the City staff person to draft Action Forms for those items that require approval by a Board, Commission, and/or City Council.

Responsibilities:

- Meet with customers in Kickoff meetings and asks questions in order to understand the proposed project and the customer's vision and needs in the project.
- Advise customer of relevant adopted City zoning and subdivision regulations, as well as other applicable land use regulations and policies.
- Determine "completeness" of development applications.
- Prepare a letter to be sent to the "Contact Person" with the determination of "completeness" or "incompleteness" of the application.
- Works within timelines specified in the *Municipal Code* for processing of the development application.
- If the application is incomplete, monitor the status of receipt of additional information needed to complete the application.
- Once the application is complete, provide the application to the Planning and Housing (P&H) Department Secretary for assignment of a case number, establishment of a file for the application, and distribution of plans to DRC members and others, as appropriate.
- Review proposed development plans for compliance with zoning and subdivision regulations and the Land Use Policy Plan.
- As part of the review, identify all items that will require approval by a Board, Commission, and/or the City Council.
- Maintain consistent, open, and ongoing oral and written communication to keep the customer up to date on the status of City review and processing of their request.
- Discuss the proposed development plans with the Planning Division staff at the regular Thursday afternoon meeting of Planning staff.
- Meet with DRC at the staff (internal) meeting to discuss the development proposal and compile DRC comments from all departments in one letter.

- Provide the DRC comment letter to the P&H Department Secretary to send to the customer.
- Meet with the customer, and all DRC members, at the Friday DRC customer (external) meeting to discuss DRC comments, answer questions, and determine the steps that are needed to complete review and approval of the development proposal.
- Compile the DRC comments from the DRC customer meeting and provide the DRC comment letter to the P&H Department Secretary to send to the Contact Person.
- Receive revised plans from the customer for review by the DRC.
- Provide direction to the P&H Department Secretary for distribution of the revised plans to DRC members, and a schedule for completing review of the plans.
- For development proposals that require administrative approval, work with the Planning & Housing Director to approve development plans once DRC members respond that all of their comments have been satisfied.
- For all development proposals that require approval and/or review and recommendations by a City of Ames Board or Commission, and/or the City Council, prepare an Action Form that includes the background information and a Planning Department or City Manager recommendation.
- Meet with the Planning and Housing Director and the City Manager's Office to review the Action Form and receive approval of the content, format, and recommendation, prior to sending the Action Form to the Board, Commission, or City Council for consideration.
- Prepare and present an oral presentation to the Board, Commission, and/or City Council concerning the information provided in the Action Form.
- Include and organize all applicable written documents in the Case File and give the file and plans to the P&H Department Secretary to distribute approved plans and close the active file.

DRC Facilitator

Role: *The Facilitator contributes structure and process to interactions to enable the DRC to function effectively and make high-quality decisions. He/she is a content neutral party who by not taking sides or expressing, or advocating a point of view during the meeting, can advocate for fair, open, and inclusive procedures and decisions to accomplish the work of the DRC. The facilitator encourages full participation, promotes mutual understanding, and cultivates shared responsibility. By supporting everyone to do their best thinking, the Facilitator enables those in attendance to search for innovative and inclusive solutions consistent with City policies and regulations.*

Responsibilities:

- Develop meeting format.
- Allocate a reasonable amount of time to each project/customer on the agenda. The amount of time to be devoted to discussion on any particular item shall be established as the meeting agenda is developed.
- As the meeting is convened, welcome the customers and define meeting goals and expectations for focused outcomes.
- Set a relaxed, positive and open tone where each participant feels at ease expressing ideas and responding to those of others.
- Follow ground rules adopted by the DRC.
- Manage the amount of time devoted to each agenda item.
- Keep the participants focused on the content of the discussion.
- Remind the participants what has been discussed and keep them moving forward.
- Monitor how well the participants are communicating with each other, and make adjustments when necessary.
- Allow participants to respond directly to each other.
- Don't allow one person to dominate the discussion. Guide the team's discussions during meetings in such a way as to ensure that all members have a voice and are contributing to the discussions.
- Note and summarize the key points and decisions throughout the meeting.
- Identify common ground without forcing consensus.
- Maintain an environment of respect and cooperation that allows City staff and the customers to work productively and collaboratively.
- Keeps waiting customers informed of the meeting progress and do what is necessary to keep the meeting on schedule to the extent possible.
- Conduct a "Plus/Delta" at the end of each DRC customer meeting, which includes a discussion of performance by team members to follow ground rules and to be accountable for their actions and responsibilities.

DRC Scribe

Role: *The Scribe establishes a written record of the comments expressed at the meeting by the customer and by City staff. The expectation is not to produce “meeting minutes,” but rather to provide clear direction for actions that are necessary to approve the proposed development.*

Responsibilities:

- Record comments made at the meeting to be given to the Case Planner for including in the DRC letter to the customer.
- Clearly document the understandings at the meeting about what must be done by the customer, by City staff, and by any others involved to reach a decision for approval of the development proposal.
- Be precise in using the same terminology in the written record as was expressed by the participants in the meeting.
- During the course of the meeting, check with the participants to ensure that the information being recorded is a fair and accurate reflection of the discussion.
- If in doubt, ask for clarification before the discussion moves on.
- Make sure that responsibility for, and commitments to action, is obtained and recorded when necessary.
- Verbalize the written comments prior to the end of the meeting to provide a common understanding by all in attendance as to what is needed to reach approval of the development proposal.

Planning Department Secretary

Role: *The Planning Department Secretary serves as the City staff member that creates and maintains the file for the development project, schedules meetings throughout the process, and distributes plans and other information to all DRC members and the customer from the time the formal application is made, until the file is closed upon approval or denial of the request.*

Responsibilities:

- Reserve individual calendars of DRC members, and schedule meeting times/locations for Kickoff meetings and all other DRC meetings.
- Receive submittals for all DRC applications, including formal applications and materials for Kickoff meetings.
- Provide the Planner-of-the-Day with formal applications to check for completeness.
- Review, edit, and send the letter prepared by the Planner for the Completeness Check.
- Once it is determined that the application is complete, create a file for each site development plan and create a form letter for the DRC staff meeting so the planner can attach preliminary staff comments to the applicant.
- Sends the letter, signed by the planner, with attached list of preliminary comments by e-mail, fax, and U.S. mail to the customer after the DRC staff meeting.
- Sends the written record of the DRC customer meeting by e-mail or fax and U.S. mail to the customer after the DRC customer meeting.
- Distribute revised plans and information (if any) from the customer to DRC members for review.
- For development proposals that require administrative approval, work with the Case Planner to document approved development plans once DRC members respond that all of their comments have been satisfied.
- For all development proposals that require approval and/or review and recommendations by a City of Ames Board or Commission, and/or the City Council, work with the Case Planner in the preparation of an Action Form that includes the background information and a Planning Department or City Manager recommendation.
- Send the Action Form to the appropriate Board or Commission for consideration.
- Place City Council Action Forms on the "T Drive" for review and approval by the City Manager's Office.
- Distribute the approved plans to the appropriate City departments and the customer, once approved by staff, or by a Board, Commission, or the City Council. Close out file.

Planning & Housing Director

Role: *Section 29.1404 of the Municipal Code names the Planning & Housing Department as responsible for the administration of the zoning and subdivision regulations of the City, including the technical review of site plans, plats of subdivision, and other land development requests submitted to the City. The Planning & Housing Director is responsible for all staff and activities of the Planning & Housing Department and is therefore the coordinator of all Departmental activities and responsibilities prescribed to the Department of Planning & Housing.*

Responsibilities:

- Planning & Housing Department staff is responsible for the intake, distributions, review, coordination, and communication to applicants seeking a decision on land development requests in the City.
- Department staff is authorized by the Zoning Ordinance in specific instances to review and approve site plans and Zoning Permits.
- Chapter 29 further provides the authority to the Planning & Housing Director or designee for the final action of approval, approval subject to conditions, or denial for Minor Site Development Plans.
- Chapter 23 (Subdivision Code) of the *Municipal Code* requires applications for Subdivisions to be submitted to the Planning and Housing Department, and describes the Planning & Housing Department's responsibilities to distribute copies of applications to appropriate departments, and to assemble, review, and report on any comments or recommendations to it for consideration by the Planning and Zoning Commission and/or City Council.
- Chapter 23 also states that it is the responsibility of the Planning & Housing Department to issue a written determination as to the classification of a proposed division or subdivision.
- Finally, Chapter 23 states that final action by the Planning Director or designee on an application shall be based solely on findings as to compliance with all applicable provisions of the subdivision Ordinance.

Policy Resolution Group

Role: *The Policy Resolution Group (PRG) will resolve conflicts between different codes, standards, and policies. This group will be made up of decision makers and will provide resolutions for issues the DRC group cannot easily make. They will also help provide support for possible code or policy changes that may be needed. This group will not hear or decide on any appeals or variances. The PRG will not have any impact on external customer interaction with the DRC.*

Responsibilities:

- Resolve conflicts between internal codes, standards, and policies.
- Establish ground rules and policies of the PRG.
- Establish direction to DRC on how to forward issues to PRG.
- Establish meeting schedule for PRG.
- Provide direction to DRC on how to handle conflicts.
- Review performance tracking measures.
- Use performance tracking to set performance targets for DRC.
- Identify common issues to work on resolutions for future applications.
- Identify code sections that need revision and forward to City Council if appropriate.
- Prevent future conflict points to facilitate development.

Opportunities for Improving the DRC Process

Based on input from customers and DRC Staff

Mind set or attitude

- Provide more help for development to happen (in accordance with Council's approved codes and plans.)
- Before application, provide more and better help, direction, dialogue and response on the specific project, its needs, review process and review schedule ,
- More specific guidance on what is needed for project approval
- More clearly identify issues along with several ideas for resolution
- Allow simultaneous processing of multiple approvals for same project (with applicant signing acknowledgement of risks).
- Final review only for resolution of previous comments and new plan res
- Track repeat issues of conflict and be pro-active in taking action to prevent these in the future

Interpretation of codes

- Interpret the codes consistently (all staff or over time for same situation).
- Allow DRC staff to interpret the codes and policies differently for different projects
- Once a code is interpreted for a project, rarely change it for that project
- Add codes to support Police Department concerns
- Plan review comments consistent with pre-application comments

Response time

- Less referral to managers and legal (staff more independent) *Resolve conflict*
- Distribute all comments on the same day as any meeting in the process.
- Approve plans on the same day as the DRC Customer meeting, when possible.
- Minimize time between resubmittal of plans and staff reply ,
- Return higher percentage of communications within a set period of time
- More predictable schedule, more similar in form to the old schedule
- Achieve the schedule more consistently

Process issues

- Make completeness requirements more consistent: application form, Municipal Code, staff needs, and what's available.
- Make it easier to find information, learn what is needed and complete applications
- Distribute submitted plans as soon as possible after verifying completeness
- More complete and coordinated DRC staff comments, emphasize approval
- Strive for approval recommendation at the DRC staff meeting.
- Reference codes or other authority only when denying approval
- Purpose of the DRC Customer meeting: ,
 - for the staff and customer to agree on changes needed for approval
 - to identify and clarify all code issues and agree ways to address these
- Establish protocols for customer meeting

Consistency in how to meet standards

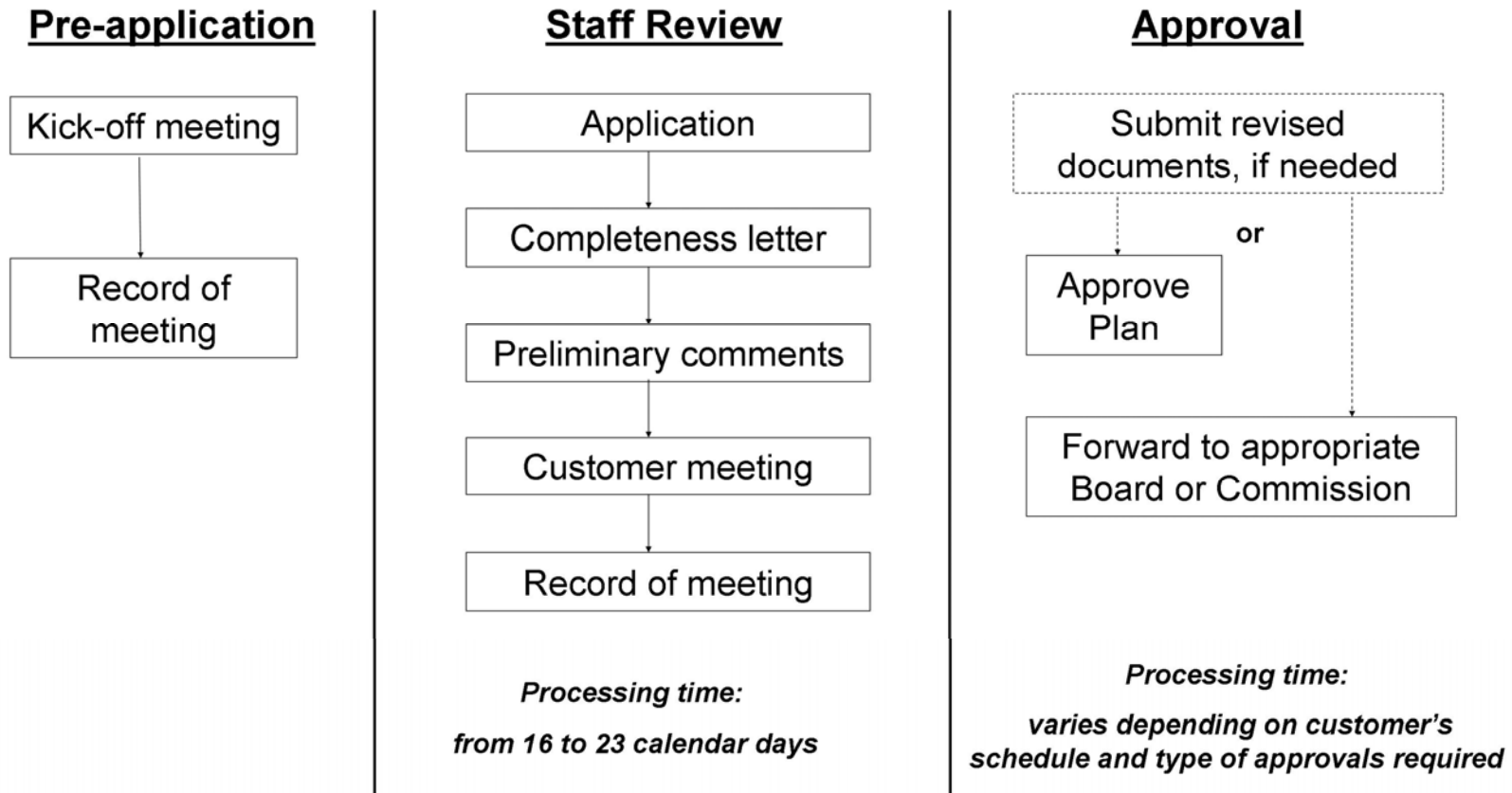
- Assign one planner to project from start to finish
- Uphold interpretations through support, training, trust, communication
- Department heads support staff decisions
- Departmental team to review plans and make comments
- Eliminate "Dependentee" attitude (fear of making mistakes or failure)
- Follow through with commitments
- Quality control measures

Flexibility

- Look at plans on case by case basis
- Update codes more often
- Add flexibility to codes
- Err on side of applicant if unsure,
- Focus on intent/purpose of code,
- Create Design Review Board to settle disputes or make rulings on questions
- Give DRC staff more authority
- Adopt criteria to replace standards

This illustrates the development review process for the types of projects for which the DRC provides information and recommendations. The DRC is involved in the Staff Review phase and the new Pre-application phase. The DRC can maintain a consistent and regular schedule for the Staff Review phase and for the Approval when the staff approves the plan. The schedule for Board or Commission review and City Council action varies. The customer determines the time period between each phase.

Development Review Process



The following pages provide a schedule for the above process, so that customers can prepare a project schedule before starting design, based on actual calendar dates and their projections of how much time they need to prepare plans, make decisions, revise plans and submit information. These schedules also will be used at the Customer Meeting for staff and the customer to determine the date and deadlines for Planning and Zoning Commission or Zoning Board of Adjustment meetings.

Staff Review Schedule

For Development Review Process

	SUN	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT
PREVIOUS MONTH							
WEEK 1				Last day complete applications are certain to be reviewed in this DRC cycle	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Maximum time required for determining if application is complete is 3 calendar days </div>		
WEEK 2			Last day applications are routed for next week's DRC Customer Meeting				
WEEK 3				Staff comments to customer by 5 p.m.		CUSTOMER MEETING Record of meeting to customer by 5 p.m.	
WEEK 4							

NOTES: This process is repeated weekly. Schedule may be modified due to holidays.
If application is incomplete, process continues again when new information is submitted

APPROVAL SCHEDULE:

When **Minor Site Development Plan** meets all requirements, staff will issue Certificate of Zoning Compliance on the day of the Customer Meeting. When Minor Site Development Plan needs revisions, staff will review revised plans within 3 calendar days after customer submits them.

For **all other applications**, at the Customer Meeting staff and customer will determine the date and deadlines for Planning and Zoning Commission or Zoning Board of Adjustment meetings. See separate review schedules for more information.

Zoning Board of Adjustment Review Schedule

For Special Use Permits and Conditional Use Permits

	SUN	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT
PREVIOUS MONTH						Deadline for submitting revised plans or additional information after DRC review for 1 st meeting of the month	
PREVIOUS MONTH							
WEEK 1						Staff recommendation for 1 st meeting of the month Deadline for submitting revised plans or additional information after DRC review for 2nd meeting of the month	
WEEK 2				1 st ZONING BOARD OF ADJUSTMENT MEETING			
WEEK 3						Staff recommendation for 2nd meeting of the month	
WEEK 4				2 nd ZONING BOARD OF ADJUSTMENT MEETING			

NOTE: Due to lack of applications from November through March there is typically one meeting per month, on the 2nd Wednesday.

Planning and Zoning Commission Review Schedule

For Preliminary Plat, Major Site Development Plan, Master Plan

	SUN	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT
PREVIOUS MONTH		Deadline for submitting revised plans after DRC review for 1 st meeting of the month					
PREVIOUS MONTH						Staff recommendation for 1 st meeting of the month	
WEEK 1		Deadline for submitting revised plans after DRC review for 2nd meeting of the month		1 st PLANNING & ZONING COMMISSION MEETING			
WEEK 2						Staff recommendation for 2nd meeting of the month	
WEEK 3				2 nd PLANNING & ZONING COMMISSION MEETING			
WEEK 4							

NOTE: Schedule may be modified due to holidays.

City Council Review Schedule

For Preliminary Plat, Major Site Development Plan, Master Plan

	SUN	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT
PREVIOUS MONTH				Last date for Planning & Zoning Commission recommendation for 1 st City Council meeting of the month			
PREVIOUS MONTH							
WEEK 1				Last date for Planning & Zoning Commission recommendation for 2nd City Council meeting of the month		Staff recommendation for 1 st meeting of the month	
WEEK 2			1 st CITY COUNCIL MEETING				
WEEK 3						Staff recommendation for 2nd meeting of the month	
WEEK 4			2 nd CITY COUNCIL MEETING				