

**Best Practices Working Session**  
**June 26, 2004**  
**Compilation of Responses**

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## **Introduction**

On Saturday June 26, 2004 the City of Madison Department of Planning and Development hosted a working session to solicit feedback to be used in a “best practices” guidebook for the development review process. Representatives from the development community, Neighborhood Associations and City of Madison Urban Design and Plan Commissioners were invited to come and offer concerns, ideas and suggestions on how to create a more predictable and timely development review and approval process. Specific attention was given to examining the roles of each group in the development process and determining ways that each group can better communicate and collaborate with other interested parties.

After initial introductions and an overview, three concurrent breakout discussions provided an opportunity for developers, neighborhood representatives and City of Madison Commissioners each to identify and discuss issues from their particular perspectives. At the end of the breakout discussions, participants reconvened for a brief summary of the morning and to adjourn this initial opportunity for public input into the guidebook.

The “best practices” guidebook is being prepared at the request of the Common Council, and will include a kit of techniques and processes that can be used by neighborhoods, policy makers and developers to discuss development issues before and during the formal project approval process. A first draft of the guidebook will be prepared during the summer, and is expected to be available for further discussion in September, and at the City-sponsored neighborhood roundtable this fall.

All of the responses given at the working session by members of each of the three groups are compiled in the following pages. This document is intended to be a resource for anyone with an interest in the production of the “best practices” guide. If you have any suggestions or ideas on how the development review and approval process can be improved you can submit them to Joe Rude of the Planning Unit by phone at 267-8725 or by email at [jrude@cityofmadison.com](mailto:jrude@cityofmadison.com).

**Best Practices Guide Working Sessions  
June 26, 2004 – Agenda**

9:00-9:30 – Large Group

- 1) Welcome
- 2) Introductions
- 3) Purpose of Meeting
- 4) Overview of Current processes  
(notification/communication/neighborhood review)

9:30-11:00 – Breakout Sessions

- 5) Formal Notification Process
  - What works?
  - What doesn't work?
  - Ideas for improvements
- 6) Communications Among Developers/NAs/Residents/ Policymakers/Staff
  - What does one group need to know about the proposal from the others and when do they need to know it?
  - Ideas for best practices?
- 7) Experiences to Include in Best Practices Guidebook

11:00-11:30 – Large Group

- 8) Report Out
- 9) Wrap Up
  - Next steps
- 10) Adjourn

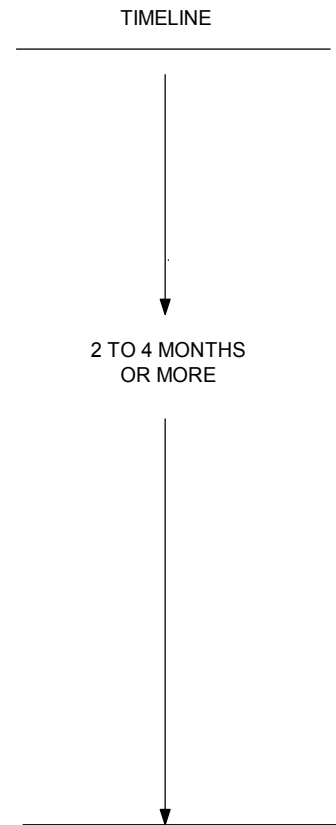
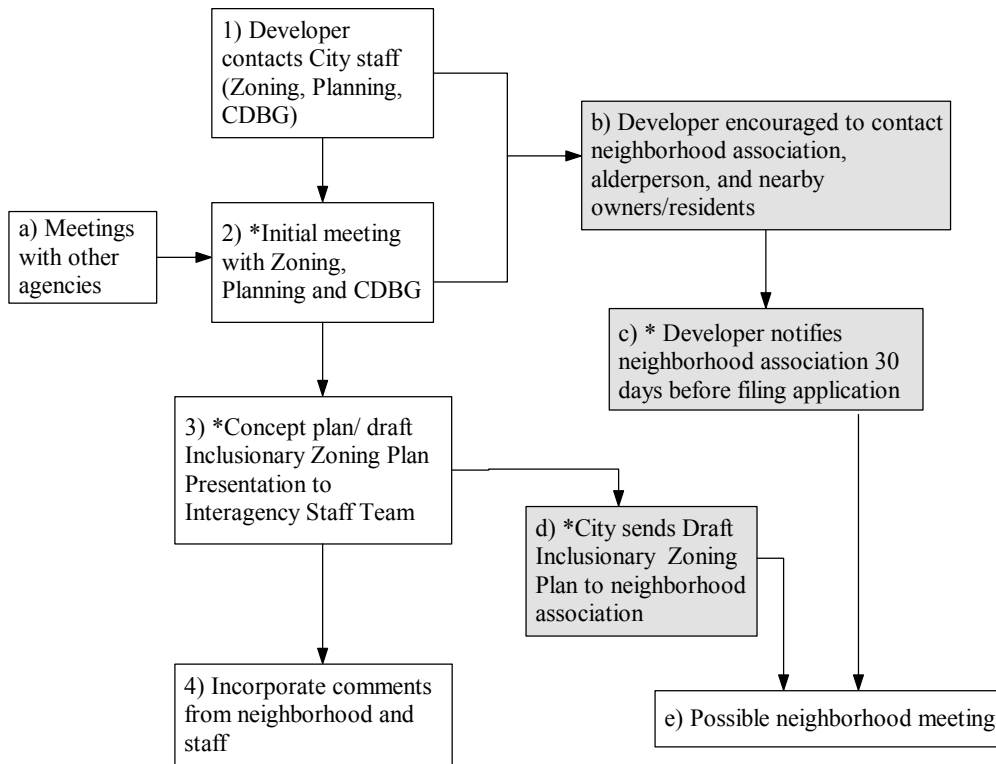
**Submit “Best Practices” ideas after the meeting to:**

[jrude@cityofmadison.com](mailto:jrude@cityofmadison.com)

or

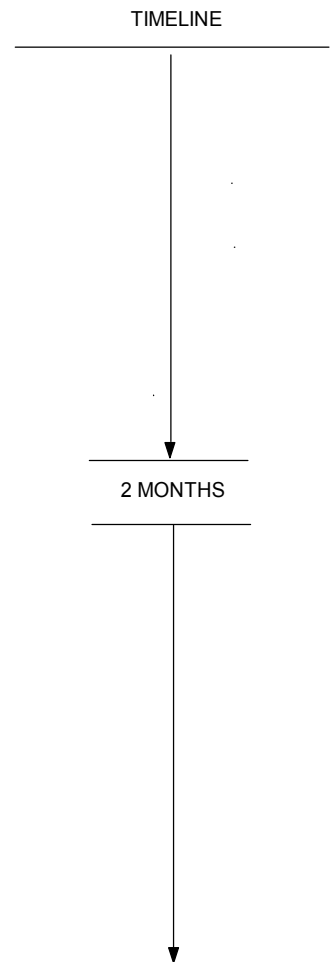
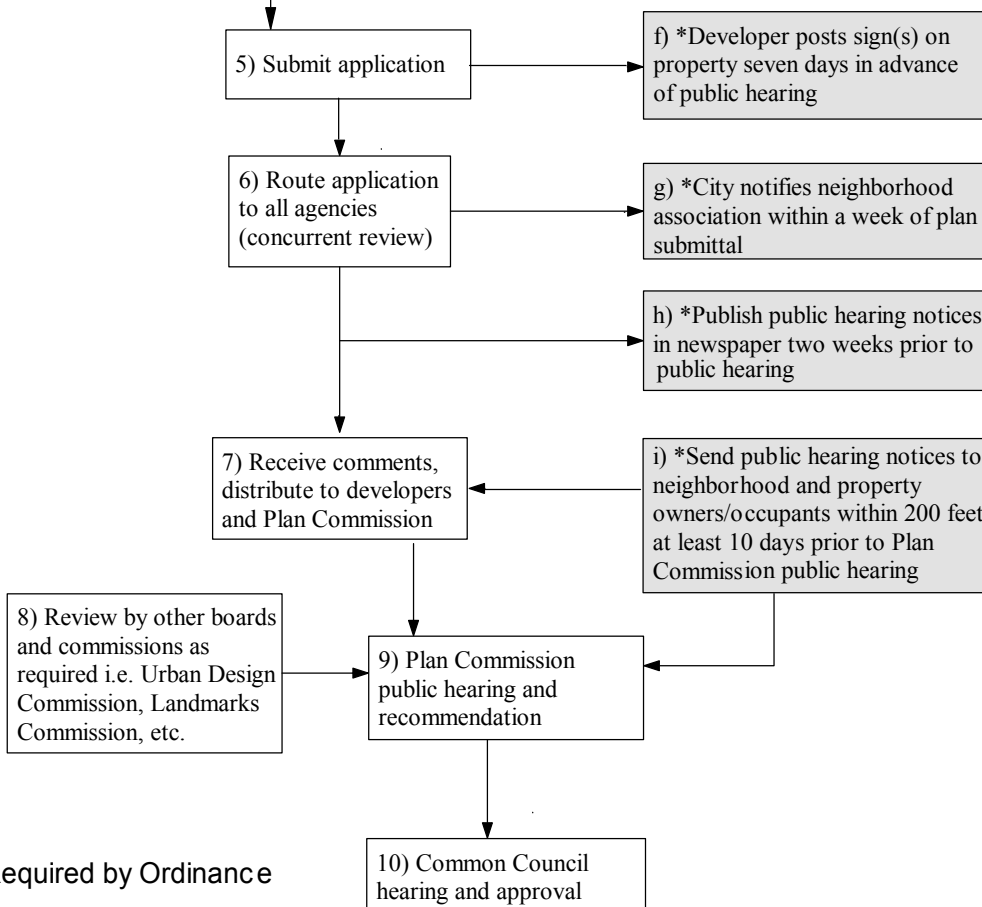
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# Preapplication Process



# Formal Application Process

(From Application Submittal to Common Council Approval)



\*Required by Ordinance

## **Pre-Application Process: What Works?**

### **Responses from Developers**

Planning staff gives good informal feedback on initial contact with developer.

Initial meeting with city staff is helpful. Gets “buy-ins” from City and gets project going in right direction.

Organized process provided by staff gives the applicant clear guidelines.

Planners are competent and generally very responsive.

Staff is knowledgeable and informative.

The initial meeting is helpful. Generally the participants are honest brokers- lack of bigger city corruption.

Neighborhood meeting can flush out issues early.

Having a willingness to consider new ideas or plan modifications.

### **Responses from Neighborhood Associations**

It’s good when developers meet with neighborhood groups early in their planning for a project.

Frequently developers work with neighborhoods of their own accord.

It is good when the underlying zoning on property matches the neighborhood goals.

### **Responses from Policy Makers**

It is good when alders/neighbors are given early notice of projects. Neighborhood Association notification is important.

General notifications process works well.

Neighborhood Associations get ‘invested’ in the project.

Citizens have ample opportunity to be involved, and the media is able to draw attention to major/controversial projects.

## **Formal Application Process: What Works?**

### **Responses from Developers**

Systematic, organized approach with emphasis on key contacts- alders, city staff, neighborhoods is provided.

Individual commission approvals (Planning, Landmarks, Urban Design, etc.) are generally clear, prompt and predictable.

Having an articulated process in place with city departments integrated into the overall process.

Having an open, well-defined process, with clear steps to gaining approval.

### **Responses from Neighborhood Associations**

It's good when neighborhoods have the resources and knowledge to play an active role in the process.

### **Responses from Policy Makers**

On-site signs informing about an upcoming public hearing on the project are very helpful.

Informational presentations to Urban Design Commission (UDC) are incredibly important and helpful.

One notice gives dates of both Plan Commission (PC) and Common Council meetings and hearings.

## Pre-Application Process: What Doesn't Work?

### Responses from Developers

Having the same process for all development. No easier, quicker process for projects that meet zoning requirements.

Large, important projects need a “comfort resolution” process that establishes public support early on.

Sometimes it is difficult to obtain significant resident involvement in the process.

There is a lack of structure, predictability, openness and accountability of neighborhood association decision-making processes.

Process can be derailed based on irrational objection by individual self-interest.

Higher goals are often not clear or considered in the process.

Lack of understanding of the process by applicants or Neighborhood Association-need for education.

Some neighborhood groups don't have direction and don't include all residents.

Gaps can develop between city staff's opinions and neighborhood opinions regarding a proposal.

### Responses from Neighborhood Associations

Developers are not contacting Neighborhood Associations earlier, (even before land purchase) at concept stage.

Early contact doesn't mean 30-day notice.

City staff should send neighborhood plan copy to developer at first notice.

City staff should issue specific recommendations for neighborhood plans, especially in potential project areas.

More specific regulations are needed on the content of developer contact with neighborhoods.

Instead of being ‘encouraged’ to contact the Neighborhood Association after contacting the city, the developer should be required to.

City should follow-up to verify developer's 30-day notification to Neighborhood Assn.

Neighborhood meetings with developers should be facilitated by a 3<sup>rd</sup> party.

Neighborhood Association's don't always do a good job of involving all residents.

Student residents of neighborhoods may not show up for meetings.

### Responses from Policy Makers

When does the neighborhood plan ‘control’ development?

Neighborhood may sometimes get involved too early (before staff) and vice versa.

It is difficult for Neighborhood Association to get site plans, meeting dates and other information in a timely fashion.

Advice from Neighborhood Association is not coordinated.

Some neighborhoods don't understand the importance of Neighborhood Plans.

Lack of communication and coordination from Town Clerks for peripheral development.

Not having a Neighborhood Association present can lead to bad projects and little neighbor input.

Good ideas get lost in the process, no ‘bank’ in which to put comments.

## Formal Application Process: What Doesn't Work?

### Responses from Developers

The scope of authority of boards and commissions is not well defined.

The scope of authority/roles/expectations of various parties is not well defined.

The public process is allowed to slow or stagnate in deference to “neighborhood input,” even when opportunity for public input has occurred.

There is a lack of coordination and predictability of the Inclusionary Zoning (IZ) process as it relates to integration with Tax-Increment Financing (TIF) determinations of eligibility.

There is sometimes conflicting direction from different review groups- Urban Design Commission, city, and neighborhoods.

The process is loaded with complications and restrictive ordinances.

The Urban Design Commission can make the process bog down.

### Responses from Neighborhood Associations

City assistance to Neighborhood Associations with planning and development is not adequate.

The sign that the developer posts on the property should be large enough to read while driving by.

The 200-foot distance for mailing public hearing notices is not enough.

200 feet is not sufficient.

Alder should take charge of neighborhood meetings on projects.

There is not a best practices guide for Urban Design Commission.

The Urban Design Commission has powers on projects that have no need to go to the Plan Commission.

Make sure master plans are followed.

### Responses from Policy Makers

The formal public hearing process is fuzzy for Urban Design Commission.

Sometimes the Plan Commission goes beyond land use, and does what other commissions should be doing.

It's not clear when projects should be referred to UDC, Landmarks, Ped/Bike, etc.

Nobody reads newspaper notices.

Notices should go further than 200 feet from project.

If documents don't get to Policy Makers ahead of time there is no way they can read them.

Policy Makers approve General Development Plans and preliminary plans without enough information.

Staff reports contradict and are sometimes not understandable.

## Formal Application Process: What Doesn't Work?

### Responses from Developers (continued)

Staff input on proposals is not always timely- e.g. Traffic Engineering.

Process takes a long time.

### Responses from Neighborhood Assoc. (continued)

Zoning entitlements sometimes allow greater building heights than are appropriate, which may lead to speculative purchases.

Zoning allows much larger development than the neighborhood wants.

Ensure that planning councils don't replace Neighborhood Association's in the process.

The city does not follow-up with Neighborhood Association after commission and final plan approval is granted by the commissions or common council, and before the permit is issued.

### Responses from Policy Makers (continued)

Lack of Traffic Engineering presence at Plan Commission meetings.

Too many neighborhood speakers at hearings saying (repeating) the same thing.

Concerned entities don't hear about Plan Commission actions until it's too late (from newspaper, media).

Last minute changes affect the whole process/timing.

Public hearing is too late in process- input is hard to incorporate into projects at late stages.

Urban Design Commission approves projects they don't like (minimum threshold?), especially on the periphery.

Fire Department often requires bad site plans that aren't in line with the rest of the city planning efforts.

## Pre-Application Process: Ideas for Change?

### Responses from Developers

There is a need to have an early meeting of planners, community and the applicant on proposals.

Some projects need an overseer or ombudsman from the City to guide the process and coordinate the factions.

Establish a City staff point person for each project to reconcile conflicting input for staff comments.

City staff member at neighborhood meeting to facilitate and incorporate staff input- align suggestions of city with neighborhood.

Better education of groups about expectations.

Require neighborhood association to establish written procedures for decision-making as a condition to participation in the approval process.

Formalize the process for neighborhood input.

### Responses from Neighborhood Associations

City should lead redevelopment in some areas, not just react to private proposals- in some cases the city should acquire land and sell it for quality development.

Adjacent neighborhoods should be notified about projects that can impact their neighborhood. Borders are arbitrary.

If developers contact Neighborhood Associations early in the process, the result will be increased opportunities for cooperation and eventual approval in a more timely fashion.

There should be a neighborhood meeting for any large project, don't just leave it up to association or alders or developers.

A single point of contact with the City should be established to help neighborhoods to impact projects.

### Responses from Policy Makers

Developer contacting neighborhood before acquiring property would improve communication.

Read the neighborhood plan!

Online: List of upcoming developments with site plan (landscape, building), pictures, elevations, schedule of project's route through the process, staff reports.

## Pre-Application Process: Ideas for Change?

### Responses from Developers (continued)

What is a neighborhood? Owners of buildings or people that live in the area or both? Some neighborhoods don't let landowners have a say. A clear definition is needed.

Include a statement at the beginning of Best Practices Guide that it is not regulatory and not procedurally binding.

Structure process based on scope of the project, one size does not fit all.

Set minimum standards for neighborhood group participation, e.g. quorum, minimum number of persons present at meetings, open process.

### Neighborhood Assoc. (continued)

### Policy Makers (continued)

## Formal Application Process: Ideas for Change?

### Responses from Developers

City should clearly state goals and objectives and refer to them when making decisions.

Structure the process based on the scope of the project.

Place all steps onto a timeline (neighbors, Urban Design Commission, etc.)

Checklists and procedures for boards and commissions to follow for reviews.

Change process for faster approval for development projects meeting conditions.

More timely staff input, e.g. from Traffic Engineering.

Outside analysis for both Tax Incremental Financing and Inclusionary Zoning determination.

Staff of an agency should have sophisticated feasibility analysis capability. Urban Design Commission needs clarification on its role.

City should be obligated to estimate and publish development costs that are a direct result of public fees, conditions and delays

### Responses from Neighborhood Associations

Increase Alderperson's budget for notification of residents.

There should be a development checklist with basic project info, such as: number of bedrooms, rent/sales price, storm water, green building, green space, design, and Inclusionary Zoning determination.

Need feedback channel from neighborhood to the City.

The process for downtown projects should be different. More people other than neighbors should be involved in the process.

### Responses from Policy Makers

Formal invitation to Traffic Engineering/ Engineering and others to attend Plan Commission meetings.

More than 200 feet for notification.

Establish a central clearinghouse for comments by neighbors (email, website, telephone service).

Set up a coordinating group with a member of each commission to discuss the process.

Let public know how to submit comments and the deadlines to do so (so that commissions get letters in packets beforehand, rather than notes left on desks at the meeting).

Give Neighborhood Associations support and training in planning principles.

## **Development Scenarios Handout**

Participants were asked to determine the information they would need from other interested groups in order to make the process run more smoothly, based on the following scenarios.

### **Scenario #1 (infill development):**

A developer has purchased a half-dozen small contiguous commercial buildings located along a major commercial street and proposes to demolish the structures to accommodate a new high-density multi-family residence with 60 units on the top five floors and retail space on the first floor. The new development will require planned unit development zoning and will be reviewed by the Urban Design Commission, Plan Commission and Common Council. The street is the boundary between two neighborhood associations and has a local business association.

### **Scenario #2 (new development in an emerging area of City):**

A developer has just purchased an 80-acre farm located on the city's far eastern edge. The proposed development is adjacent to other new developments, with nearly 1000 residential units already built to the west in the last five years. The area east and south of the site is mostly undeveloped.

The area is currently served by narrow two-lane roads and capacity improvements will be required to serve the new development. The developer is proposing 450 dwelling units on approximately 60 acres of the site, with the remainder of the property to be developed as a neighborhood commercial center, with shops, small offices, a grocery store, restaurants, a coffee shop, bank and a limited amount of residential. The site is currently zoned Agriculture and is recommended in the adopted neighborhood development plan for future residential and mixed-use development. There is a recently formed and not well-organized neighborhood association for the area.

## **Developer's Communication Matrix**

What information do Developers need.. and when?

\*Different Information needed for Scenario #2 is in *italics*.

### **Information Needed From Neighborhood Associations:**

Keep projects and ex-problems separate

Memo of Understanding to get everyone on the same page and identify problems.

Organized process for articulating/discussing how approval can be achieved and how long it will take.

A list of issues with potential rational solutions to the issues.

Need answers to "Who are decision-makers?" How will they come to a position?" "Will they hold that position?"

Definition of their goals and objectives at the outset that is generally binding going forward.

A list of concerns/ assessment of the impact on immediate neighbors to the project and the neighborhood at large.

Coordinated feedback when working with multiple neighborhood groups.

Need early initial feedback and coordination between associations.

Neighborhood predictability and adhering to standards- Who makes final determination on direction of recommendations and when?

*Early group public meetings of all parties (kickoff meeting).*

### **Information Needed From Policy Makers:**

Clear communication of the relationship of Inclusionary Zoning to Urban Design Commission regulations.

Careful pre-planning to clearly understand if the project fits within overall city planning.

Broad-brush policy directives. Creative, flexible responses with leadership in adhering to goals and objectives.

Less focus on pet/personal project add-on's and more focus on merits of application and reviews.

Any agenda that is not part of written plans or zoning should be communicated before formal application.

Comfort resolution outlining: zoning/use/density (generally), Tax Increment Financing eligible?, IZ density bonus? Conformance with city master plan? Traffic impacts?

Aldersperson objectivity as the facilitator of neighborhood process and commission approval process.

Not becoming parochial and/or giving too much deference to the home alder.

Memo of understanding at the outset for larger projects.

Established procedures in place for neighborhood associations.

**Developer's Communication Matrix**  
What information do Developers need.. and when?  
*\*Different Information needed for Scenario #2 is in italics.*

**Information Needed From City Staff:**

Coordination with all departments.

Objectivity.

Support, leadership throughout the process.

Need to establish a consistent staff contact, project manager throughout the process.

One main city contact person to guide the process.

Representative at neighborhood meetings to provide guidance on process, policies and issues.

Developers need feedback with adequate time to adjust plans and proposals before agency presentations and votes.

Comprehensive identification of all plans affecting the project.

Where is the project on the flow chart?

Complete and timely reviews.

Relationship between the Fire Department and the Urban Design Commission needs to be clarified and explained to both bodies.

City engineering needs to coordinate for more timely feedback.

**From City Staff (continued):**

Better communication between Planning, Traffic Engineering, Engineering and Fire Department.

*Assistance in mobilizing neighborhood input.*

*Understanding of parallel processes and timeline upfront- Reginal Planning Commission, Long-range transportation, Land Use Plan amendment*

*Formal and early determination of pro-rata share of offsite improvement (formulas?).*

**Information Needed From Other Residents, Owners and Groups:**

Opinions are needed early in the process, they should be included in early neighborhood meetings.

General feedback on whether resources are available, e.g. help with retail.

Understanding of the neighborhood plans and design guidelines that affect the proposal.

## **Neighborhood Association's Communication Matrix**

What information do Neighborhood Associations need.. and when?

\*Different Information needed for Scenario #2 is in *italics*.

### **Information Needed From Developers:**

That the developer is purchasing multiple buildings, while they are doing it.

Will the building be rental or owner-occupied?

A project's lot coverage, impact on storm water, green space.

Details of proposal as soon as possible, such as: what type of retail? parking details? size of units?

*The role of public space for gathering and community building.*

*Plan for reality and build multi-functional neighborhoods that will not create problems in the future.*

*What is the connectivity/grid system of streets between neighborhoods? Are there sidewalks? Do plans meet ADA (Americans with Disabilities Act)?*

*How do developers present Inclusionary Zoning units to existing residents?*

*What other projects has the developer done? Need to know when the neighborhood first starts working with the developer.*

*Plan for how residents will access commercial areas without cars-paths, crosswalks, etc.*

### **Information Needed From Policy Makers:**

Neighborhood Association President shouldn't be able to sign-off and waive full neighborhood notification.

What pedestrian/bike amenities are included?

What are the historic preservation impacts?

Notification of Planning Councils cannot replace Neighborhood Association contact.

*Will there be any public transportation? Affordable housing residents may need it.*

*Why do we allow for residential development in areas where public transportation doesn't exist presently?*

## **Neighborhood Association's Communication Matrix**

What information do Neighborhood Associations need.. and when?

\*Different Information needed for Scenario #2 is in *italics*.

### **Information Needed From City Staff:**

Notice of property acquisition ASAP.

Annually send development review flow chart to Neighborhood Associations.

What is the planning/zoning for this area? Need to know before developer makes proposal.

How does proposed development compare to neighborhood plan?

For projects on Neighborhood Association boundaries, both Neighborhood Associations need to be contacted.

Dates of all public meetings and hearings, and their purpose as soon as the information is known.

What process does this development have to follow?

Clear guidance and understanding of what changes can be made and what modifications are open for discussion.

Need definitions of what zoning classifications mean and allow for.

Education to Neighborhood Associations about the ABC's of development and planning.

### **Information Needed From City Staff (continued):**

If the street is a major commercial district then it affects people outside of the neighborhood who have a use concern and they need to be notified and included in the process.

Density, height and the scale of the project in relation to the character of the street.

*Traffic impact early on.*

*How do plans fit with neighborhood plans developed by the city?*

*Soon after an area is developed somewhat, the city should convene residents to devise plan for new developing areas.*

*Build streets to be a passive notification of planned development.*

### **Information Needed From Other Residents, Owners and Groups:**

(No comments given)

## Policy Maker's Communication Matrix

What information do Policy Makers need.. and when?

\*Different Information needed for Scenario #2 is in *italics*

### Information Needed From Neighborhood Associations:

If neighborhood doesn't get organized it's their own fault.

Is there a zoning committee that the developer should meet with early on?

Tell Policy Makers how the development integrates into the surrounding neighborhood, especially traffic flow, pedestrian connections and building characteristics.

It would be useful to have a sense of the percent of the people that support and oppose the project.

*Is there a neighborhood association?*

### Information Needed From Developers:

Developers should do an early informational presentation to Urban Design Commission.

What types of retail are envisioned?

Design of structure, how does it fit in? Traffic and parking impacts?

*More informational presentations. Maybe have a meeting every 3-6 months only for informational presentations so Policy Makers can give more feedback earlier in the process.*

### Information Needed From City Staff:

Does the project meet the adopted plan? How will it impact traffic? Is it compatible development?

Staff should inform Policy Makers of regulations and statutes.

Give details of how project does or doesn't match neighborhood plan.

Need report from historical preservationist or Landmarks Commission.

Is there a neighborhood plan? Does the proposal conform to the plan? If not would it be a good addition?

*Is this within an area designated for development?*

*A sense that developers and staff have worked to increase green space and infiltration as much as possible.*

*Are wetlands involved? What protections have been considered?*

*Impress on Town Clerks the need to notify their citizens of City plans or projects near them.*

### Information Needed From Other Residents, Owners and Groups:

Need to hear from business association. Input from local groups besides neighborhood associations- business groups, watershed groups, community center, friends of park, etc.

## **Best Practice Ideas**

### **From Developers:**

Direction from City on expectations for growth- have plans/goals.

City policies and plans should be clear to all parties. (Two comments)

What should be provided to Neighborhood Associations and when- what is the neighborhood role?

Set up guidelines for neighborhoods. Require neighborhoods to have processes.

Madison needs neighborhood accountability and standards for input.

Council Alderperson should coordinate feedback from neighborhoods- serve as a point person.

Review checklists for all parties. What issues should neighbors address?

Get City comments to neighborhood early/earlier. (Post on the web?)

Channel all comments from board/commission review.

Early input from stakeholders=predictability.

### **From Developers (continued):**

Often City staff runs process elsewhere.

We need to differentiate process from project. The more process involved, the less consistency in the project.

Include guidance for Neighborhood Associations vs. neighbors, owners and residents. Discuss the weight given to each.

Educate neighborhoods/neighbors on City goals and issues.

Need to instill neighborhood accountability with a clear, articulated process on a timeline.

## **Best Practice Ideas (continued):**

### **From Neighborhood Associations:**

Autumn Wood project- developer came to Neighborhood Association first and with an attitude of gaining support.

Union Corners- bringing groups together first.

Having a detailed plan is very important.

City should help neighborhoods downzone if they don't want high growth levels.

Brayton Lot plan.

Willy St. plan.

### **From Policy Makers:**

Neighborhood Plan: a point of negotiation.

Informational meetings/presentations early in the game.

An example not to follow is St. Mary's: came to UDC without sufficient neighborhood notice, many meetings later support was finally established.

Sufficient neighborhood input should be collected ahead of time.

Finding out the "hot button issues" early is important.

Vandewalle/Veridian- Felland/Autumn Lake. Year advanced public involvement.

Best processes are planning processes, not just development processes. Incorporate larger picture.

Flad's Sauk Point- the developer knew what PC/UDC was looking for. Local developers usually know these issues better.

List of conditions based on experiences that are likely to come up (dark sky, storm water, etc.).