

# City of Dallas, Texas Development Review Enhancement Strategy

Workgroup Report

June 2015



Self-criticism is the secret weapon of democracy,  
and candor and confession are good for the public soul.

*Adlai Stevenson*

Special thanks to The Real Estate Council and all of those who lent their time, thoughts and expertise to this initiative including representatives from: Asian American Contractors Association of Texas , Ati Construction, BDD Engineering, Billingsley Company, CityPlace, Corinth Properties, Davis Advocates, Fifer Renovations, Gadberry Construction Corp, Good Space, Jackson Walker, JHP Architecture, Joe Payton, Kimley Horn, Masterplan Consultants, Pacheco Koch, PDI Green Technology, Regional Hispanic Contractors Association, RLG, Winstead McGuire, along with representatives from the following City of Dallas Departments: City Attorney's Office, Dallas CityDesign Studio, Office of Economic Development, Department of Sustainable Development and Construction [Building and Inspections, Current Planning, Engineering, Real Estate, Q-Team], and Planning and Neighborhood Vitality.

# Contents

Executive Summary	02
Introduction	05
Background	06
Current Conditions	08
Process of Study	13
Desired Results	14
Recommended Enhancements	15
Overview	16
Organization and Culture	17
Coordination and Processes	22
Communication, Training, and Outreach	27
Strategic Implementation Plan	32
Appendix	41

# Executive Summary



Dallas is a vibrant, economically diverse city that is among the fastest growing large metros in the country. Rapid growth and a high volume of projects have resulted in increased (and often increasingly complex) permit applications. Additionally, developers perceive that the City's development review process is not operating as efficiently as it should, which prevents the City from fully capitalizing on future growth opportunities and diminishes the City's competitive edge over other municipalities. While there are a number of bright spots from recent improvements, there remains room for continued enhancements. Specific attention must be paid to the pre-development phase of the review process, as it requires extensive inter-departmental coordination, particularly with Engineering, Fire, Water, and the Dallas CityDesign Studio.

To address this issue, the City established a working group of The Real Estate Council, City staff, and a cross-section of real estate development industry professionals, as well as engaged in additional discussions with other development-related businesses. The purpose of the effort was to identify key challenges and develop a plan for implementation. The intended result is to improve the efficiency, transparency and predictability of the development review process in Dallas and to provide a development review process and regulatory environment that proactively facilitates desired growth and development.

This process identified three strategic categories for enhancement: organization and culture; coordination and processes; and communication, training and outreach. Detailed implementation initiatives in each of these categories are outlined in this report. Top strategic actions include:

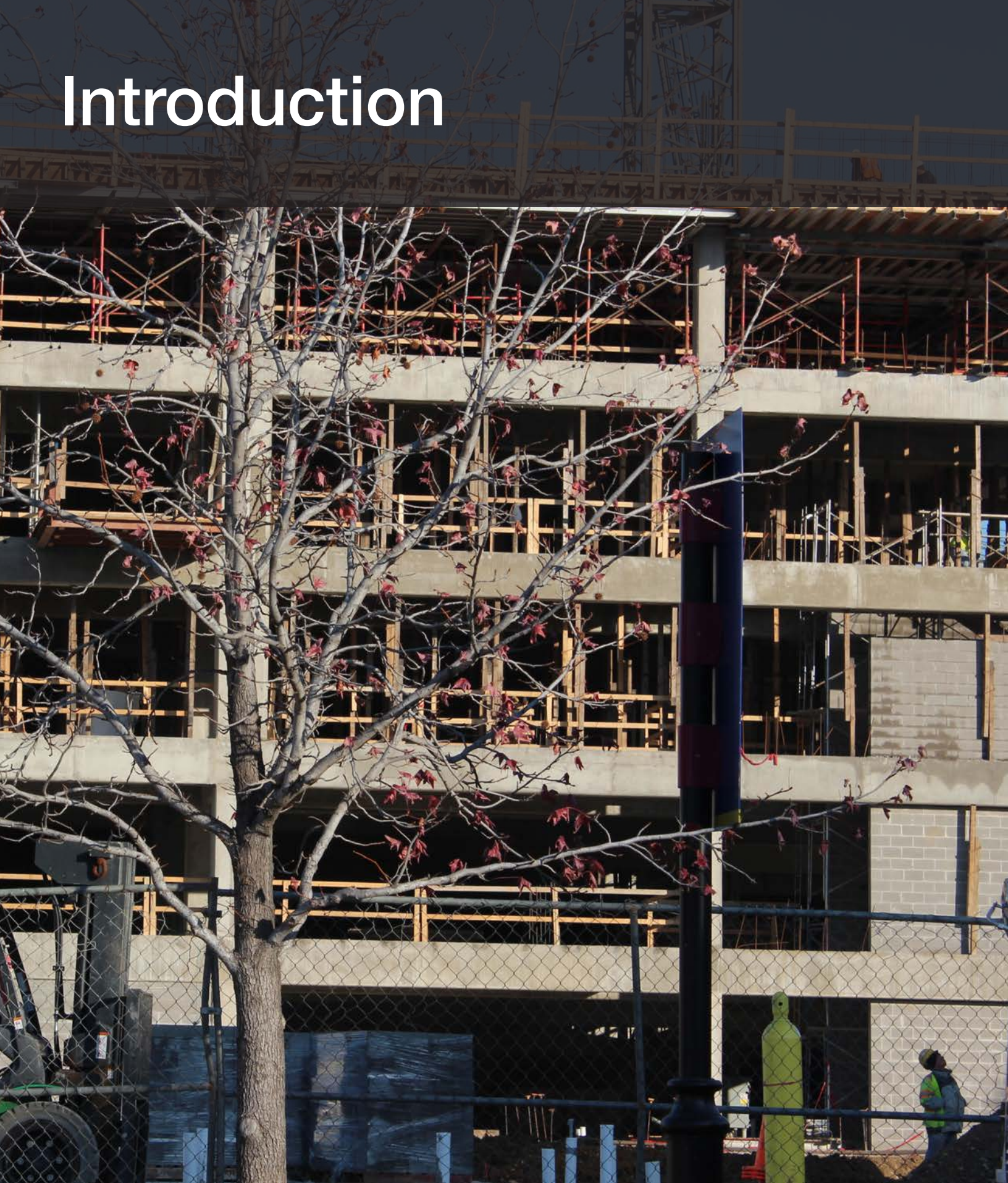
- Assemble a permanent project management team focused on enhancing development review that is responsible for advancing recommendations outlined through this effort; providing comprehensive development coordination to facilitate projects through the entire spectrum of development review; and providing a feedback loop to identify additional opportunities for enhanced service;
- Develop a detailed implementation strategy focused on enhanc-

- ing pre-development functions;
- Develop and implement a communication, education, and outreach strategy;
- Identify needed amendments to the Development Code for consideration by City Council; and
- Continue rollout of technology upgrades.

It should be noted that this document only represents the beginning of the conversation. While there are certainly quick actions that can bring immediate results, substantial change in the policies, process, and practices of the City to continue meaningful improvements in the development review arena is a multi-year program requiring a great deal of diligence; a continued spirit of cooperation; a willingness to engage in a candid dialogue and critique of current performance; and an ongoing desire to listen and discern root issues to fully address areas of concern.

Undoubtedly, development in urban centers such as Dallas is a complicated process. The intent of this document is to provide an initial overview of solutions and serve as a guide for critical path actions to continue to evolve and enhance development review functions to match these changing demands.

# Introduction



## Background

The City of Dallas and The Real Estate Council [TREC] have engaged in a collaborative dialogue to investigate improvements to key components of the City's development review processes. Both entities have a shared interest in streamlining the development review process—the development community to provide more efficient and cost effective delivery of products to the market and the City to support economic development and other public objectives, while improving cost effectiveness of service delivery relating to development review.

TREC initiated the request to examine the review process and presented their findings to the City, outlining key areas of concern and potential improvement in a report developed in September 2014. Key items from TREC's September 2014 report [See Appendix for full report] were:

- General Issues – provide an Ombudsman to serve as a facilitator for larger projects to address the need for a single point of contact to assist in pushing projects along;
- Permitting – hire additional staff and ensure consistent staffing throughout the day to improve timeliness of the process and improve customer service for bilingual applicants; create performance metrics and implement communication protocols to add clarity and efficiency to the review process; adequately train staff to ensure consistent application of the rules; provide staff to improve clarity of application intake process at the Permit Center;
- Abandonments/Licensing/Easements/Dedications – improve timeline for real estate requests by establishing clear performance metrics and review protocols; hiring additional staff; utilizing a Q-team approach; addressing regulatory hurdles to abandoning certain easements by plat; and defining the City Attorney's role in the review process more clearly;
- Platting – add staff or increase third party review to address areas where review time is lagging due to staffing needs [primarily engineering]; increase availability for application submittal; address requirement regarding development bonds to improve the timeliness of the platting process;



- Zoning – improve review process by using a more collaborative approach to the Zoning Review Team process; improve communication protocols to increase transparency and provide applicants a better understanding of City Plan Commission target dates for their requests; create metrics to improve efficiency of legal description review process;
- Board of Adjustment – increase capacity for the number of Board of Adjustment requests acted upon; and
- CityDesign Studio – provide clear standards for CityDesign Studio review to improve predictability of the process.

Since recovering from the Great Recession, important strides have been made in recent years to improve permitting and vertical construction review. There are a number of bright spots, including a highly regarded Q-Team that is a model of customer service and review efficiency for cities around the country; significant decreases in wait times at the Permit Center; increases in the percentage of same day inspections; utilizing multi-year budgeting to distribute permit fees to match project timelines; implementing ZIP process recommendations; and adopting wider use of technology to improve service delivery. However, pre-construction infrastructure and site development review processes remain the primary areas for additional improvement. Primary opportunities for enhancement are:

- Timeliness of review and approvals could be improved, particularly pre-development functions;
- Predictability and transparency of the process needs to be increased;
- Consistency in interpretation and application of development code requirements needs to be improved;
- Inter-departmental co-ordination needs greater focus to create a seamless review process;
- Requirements and expectations need to be clearly communicated; and
- Procedures and mechanisms to resolve issues need to be implemented.

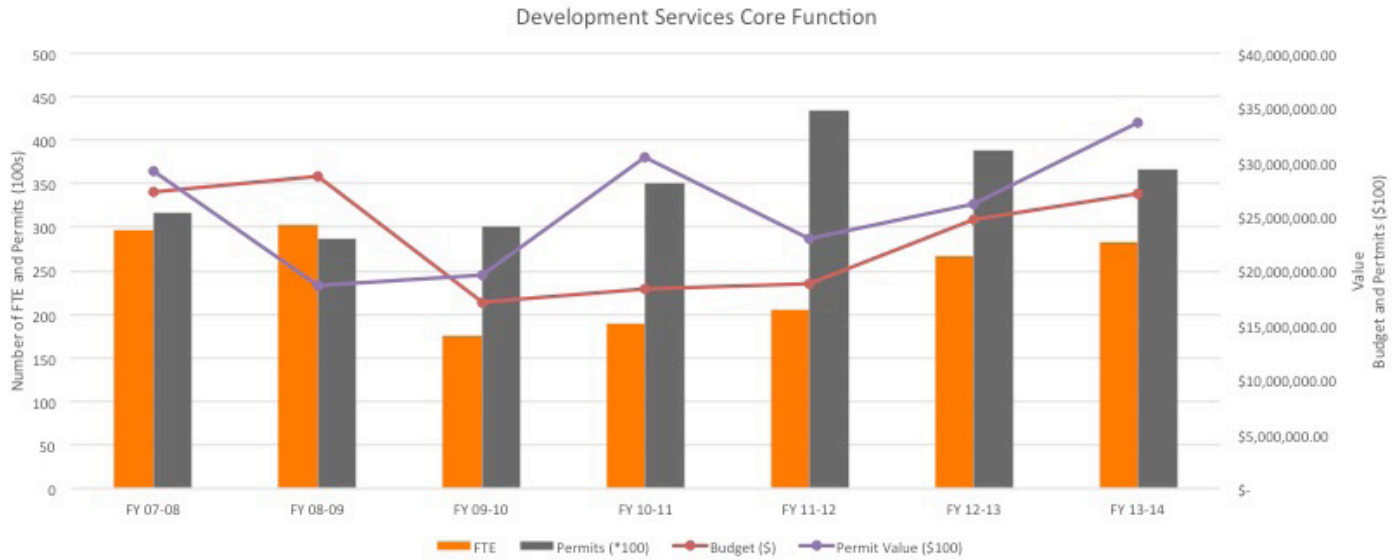
## Current Conditions

As the urban center of one of the fastest growing regions in the nation, Dallas is experiencing a development boom that includes an array of projects from large-scale redevelopment in the Downtown core to redevelopment opportunities in emerging neighborhoods throughout the city. Developers perceive that the City's development review process is not operating as efficiently as it should, which prevents the City from fully capitalizing on future growth opportunities and diminishes the City's competitive edge over other municipalities. The economic downturn had a profound impact upon staffing levels, and the City's ability to meet demands was challenged as the economy recovered [See Figure 1]. Important strides have been made in recent years recovering from the Great Recession to improve permitting and vertical construction review; however, horizontal development—pre-construction infrastructure and site development—review processes remain as the primary area for additional improvements. Figure 2 further identifies the various aspects of project review.

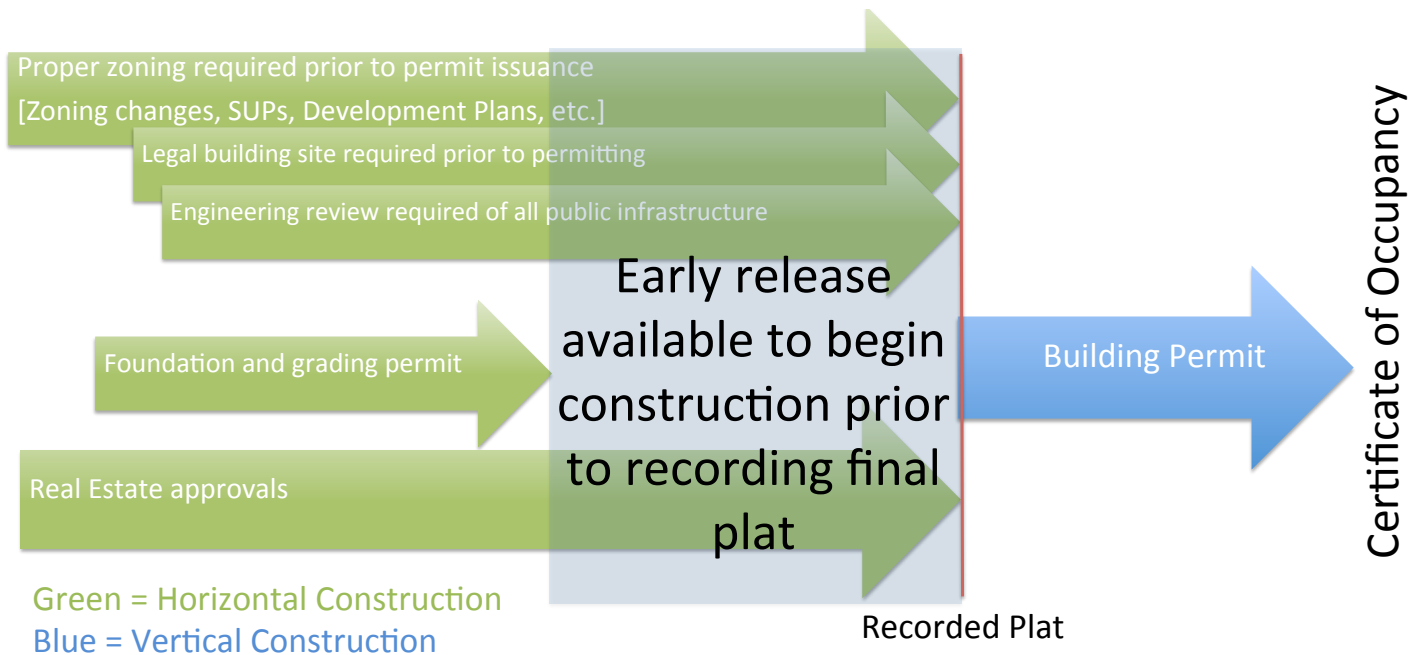
The development community is balancing tenant demands and time constraints from lenders with requirements of the City Review process. Lack of predictability in the City's process can result in "late hits" and unanticipated delays that add a level of risk to development projects. The general worry and discontent expressed by the development community during this study focused on this lack of predictability, ambiguity around timelines, and a fragmented and disconnected review process.

At the same time, City Staff has multiple layers of responsibility with the primary objective to uphold the City's regulations and protect public safety. Meeting these objectives while providing good customer service, enforcing Code requirements, and accounting for various interests—the neighborhood, the applicant, and the City's vision—to balance private desires with the public good is a complex undertaking. There have been additional staffing challenges following the recession, with the loss of experienced talent and workforce. Additionally, reviews can be slowed or complicated by incomplete

**Figure 1. Impact of Great Recession on Development Review in Dallas**



**Figure 2. Current Workflow for Construction Projects**



and inaccurate submittals, lack of familiarity of and compliance with the existing regulations, lack of applicant team communication, and complexities of planned development districts. The challenge for staff is continue to uphold the role of the City, enforce regulations, and protect public safety, while trying to be flexible and responsive to meet market expectations and keep the City competitive, both regionally and nationally.

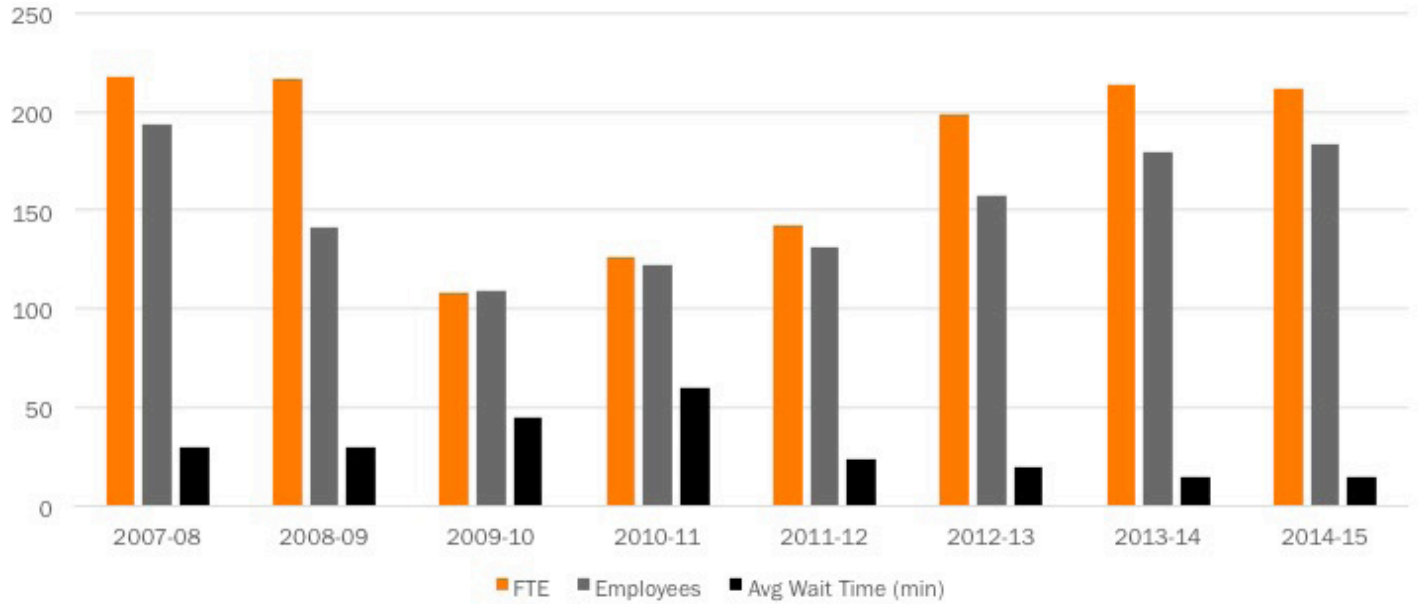
Undoubtedly, development in urban centers such as Dallas is a complicated process. Given the size of the city, the scale of the workforce required to manage and monitor building activities presents its own set of coordination and communication issues, and in fact, reaches throughout the organization. Having over 900 planned development districts, each with their own set of zoning regulations, certainly contributes to the complexity.

Following the recovery from the Great Recession, which resulted in a substantial reduction in staff employed in the various functions of Building Inspections, the City of Dallas has been rebuilding its development review functions. In FY 2013-2014 Building Inspections added 41 FTEs to improve levels of service in development review. Additionally, the Northwest Field Inspection Office was reopened, increasing field inspection offices from three to four. Electronic Plan Review has been rolled out, with early implementation currently being tested as part of the City's Q-Team program. A concierge program was recently created to assist Building Inspection customers that are new to the development process or have a complicated development project, with two FTEs dedicated to providing guidance through aspects of the permitting process.

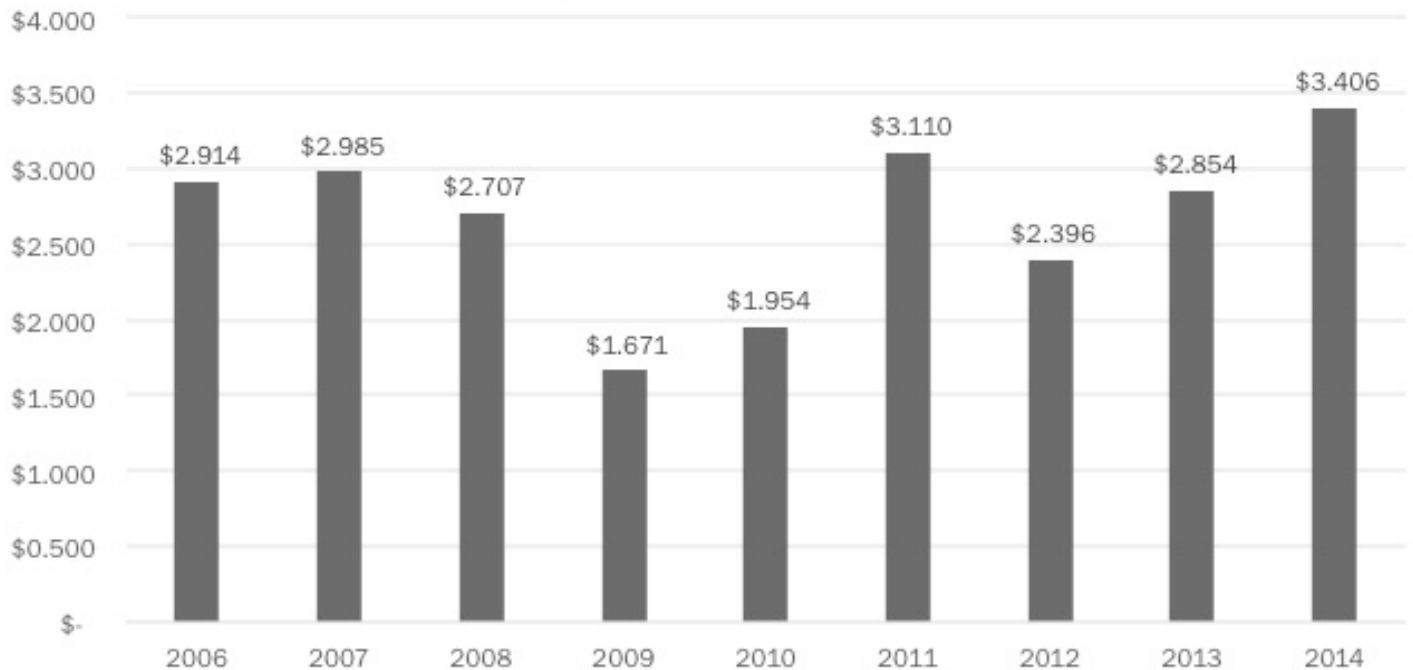
These and other recent service improvements have begun improving the level of service to applicants [Figures 3 & 4]. Key results include:

- Walk-in wait times in the Building Inspection Permit Center have been reduced 41%, from 27 minutes to 16 minutes;
- The majority of single family permits are now issued same day, even while single-family permit issuance has increased 32% over

**Figure 3. Building Inspections Staffing**



**Figure 4. Value of Permits Issued (in billions)**



the last two fiscal years;

- The number of field inspections completed on the same day requested has risen from 93% in 2013 to 98% in 2014;
- Pay adjustments have been the City to be more competitive in filling vacancies;
- Work group was formed to evaluate OCMC space needs; and
- Interdepartmental meeting has been instituted to review cross-departmental coordination issues.

In addition to these achievements, there are areas where existing improvements could be expanded or new enhancements explored, particularly with regard to preconstruction infrastructure and site development review and approval processes. Bringing focus to this area of review will help to clear the backlog for plat reviews and reduce overall plat review timelines. There is also a general need to improve protocols, checklists, and update the development guide, as well as increase accountability and coordination across the entire spectrum of the review process.

## Process of Study

The recommendations outlined in the September 2014 TREC report served as the starting point for discussion. In response to TREC's request, the City Manager's Office directed the Office of Economic Development to spearhead an examination of the City's development review processes and make recommendations for enhancements. The City and TREC participated in a series of discussions to confirm and vet key issues, as well as identify any additional areas of concern associated with the various types of approvals typically sought by developers. Representatives from TREC, various City Departments, local engineering firms, and individuals engaged in processing requests through the City attended these "listening sessions." The purpose of the discussion was to:

- Better understand the concerns posed by TREC and identify "root" causes;
- Outline a full suite of issues to be addressed through this investigation;
- Identify current work underway at the City to improve the development review process; and
- Determine areas for additional process improvement.

In addition to the conversations with TREC, the City held a workshop, convened by the Small Business Resource Center, to solicit input and feedback from representatives working on smaller-scale projects. The purpose was to identify issues relating to a different scale and type of development. The City further engaged in additional conversations with various industry representatives, including developers; permit expeditors; as well as design and engineering professionals. Research and conversations with other municipalities addressing similar issues around the country provided examples and insight into other means to implement change. Detailed conversations with key City staff provided deeper insight into challenges that the City is facing. Finally, observation of the Q-Team process and an electronic plan review provided an opportunity to evaluate a local best practice for applicability to other area of the review process.

## Desired Results

Throughout this process, participants on all sides of the issue exhibited a cooperative attitude and genuine desire for Dallas to succeed in this endeavor. It should be noted however, that this document only represents a first step. Although actions have been identified to bring about immediate results, substantive process change will require a sustained initiative. This will involve ongoing engagement with industry professionals, a continued commitment to technology upgrades, establishment of meaningful metrics and full process accountability, as well as improved communication, training and outreach.

This document synthesizes key issues identified by the workgroup, and makes recommendations for process improvement. Desired results are:

- A development review process and regulatory environment that better facilitates desired growth and development;
- A predictable and transparent development process;
- Improved efficiency and effectiveness of development review; and
- Improved coordination and communication throughout the entirety of the review process, both internally and externally.



# Recommended Enhancements



## Overview

Many common themes emerged from the listening sessions and meetings. This commonality provided a level of understanding that the issues noted were chronic and systemic in nature rather than one-off occurrences resulting from a set of unique circumstances. Recommended enhancements are intended to address the bulk of these issues and offer an approach to addressing each.

Key issues arising from the dialogue aligned generally into three categories:

- Organization and Culture – Fostering a more collaborative organizational culture and aligning the structure to be best suited to execute City duties in an efficient and transparent manner;
- Coordination and Processes – Minimizing fragmentation of review efforts and approvals, streamlining and adding predictability to the process, as well as addressing outdated regulations and code requirements that do not align with the City’s vision and development objectives; and
- Communication, Training, and Outreach – Developing a communication strategy to provide clear, timely, and relevant information to customers and other staff.

This document outlines specific outcomes, goals, and strategies to realize improvement in each of these three categories. In key instances, more detailed actions have been identified to further articulate necessary steps on high-priority or strategic initiatives. Recommended enhancements are organized in a way that actions outline how strategies will be executed in order to reach goals and achieve desired outcomes. Recommendations are color coded by functions involved, in order to provide a clearer understanding of implementation responsibility. An implementation matrix at the end of the document provides further details for these actions.

## Organization and Culture

During the course of the study, a number of changes were identified that relate to the structure of the organization and improving the corporate culture. Hiring and maintaining quality of staff is a challenge. Recent turnover due to the economic cycle is both a concern and an opportunity. While institutional history has been lost, having one-third of staff hired within the last two years presents an opportunity to foster a cultural change aligned with the City's vision.

## Where We Are

- Recent pay adjustments have allowed the City to be more competitive in the market for new hires and retaining staff
- OCMC remodel is underway to accommodate changing demands in space needs and provide a more customer-focused atmosphere
- Q-team is viewed as a best practice in customer-focused service delivery as well as model of efficiency in development review and problem resolution
- Q-Team comment cards and links to a survey on the backs of green and red tags provide customer feedback opportunities
- A two person concierge team was created in Building Inspection to assist projects by facilitating permitting functions
- Multi-year budgeting has been implemented to align permit fees with project timelines

## Desired Outcomes, Goals, Strategies and Actions

**Outcomes** are the overarching targets for the future performance of the development review process generated out of the work-group conversation.

**Goals** establish specific, measurable, attainable targets to guide implementation.

**Strategies** outline the steps necessary to achieve goals.

**Actions** provide further detail regarding critical path work items in some key instances.

Where appropriate, implementation activities are color coded in the following way in order to clarify specific responsibilities or areas of impact:

General Applicability

Building Inspections

CityDesign Studio/Long Range

Planning

Current Planning

Economic Development

Engineering

Real Estate

## Where We Are Going

### Outcome 1.1: The development review process exemplifies a collaborative culture focused on innovation and problem-solving

Goal 1.1A: Build team attitude and collaborative mindset among staff. Strategies to achieve this goal include:

1. Develop multi-year program that engages development review staff across the organization to instill organization values focused on customer service, efficiency, transparency, and innovation
2. Hold periodic Department-wide Town Halls to encourage two-way communication
3. Build accountability and responsiveness as a key measure in staff performance reviews

Goal 1.1B: Address hiring to more effectively respond to market demands, and empower staff to troubleshoot and problem solve.

Strategies to achieve this goal include:

1. Fill key vacancies in all departments and hire temporary staffing and/or third party contract personnel to address backlogs
2. Anticipate retirements and double-fill positions when possible
3. Continue evaluating salary scale to stay competitive in the market

## **Outcome 1.2: The organizational structure is aligned to operate in a transparent, efficient and customer-focused manner**

Goal 1.2A: Capitalize on opportunities of newly focused Department of Sustainable Development and Construction. Strategies to achieve this goal include:

1. Develop Departmental Mission, Values, and Strategic Plan through collaborative dialogue across the Department
2. Ensure that new performance measures include metrics to emphasize customer service, efficiency and innovation
3. Evaluate organizational and reporting structure of the newly focused Sustainable Development and Construction Department in order to best execute revised Departmental Mission, Values, and Strategic Plan

Goal 1.2B: Create project champions to encourage seamless development review process. Strategies to achieve this goal include:

1. Assemble a permanent project management team focused on enhancing development review that is responsible for:
  - Advancing initiatives outlined in this document
  - Providing comprehensive development coordination to facilitate projects through the entire spectrum of development review
  - Providing feedback loop to identify additional opportunities for enhanced service
2. Partner with Small Business Resource Center and other Office of Economic Development staff to review needs for small businesses and complicated projects
3. Define the scope of services that are provided by the recently created concierge program

- Goal 1.2C: Provide a conducive environment to support a “one-stop-shop” mindset and facilitate a coordinated work environment and customer service goals. Strategies to achieve this goal include:
1. Identify immediate space needs as well as functions that benefit from physical proximity
  2. Find cost effective solution to address long-term space needs

## Focus: Case Management Services

The concept of utilizing ‘development concierges’ to assist applicants navigating the development process is regarded as potentially being a high-value, high-impact tool that could begin to address customer concerns as a measure while other improvements are being implemented.

A review of various approaches to case management with regard to development review was conducted. The cities or studies reviewed to-date are outlined below.

- Las Vegas, NV
- Los Angeles, CA
- Boise, ID
- Pennsylvania Centre Region Council of Governments
- American Planning Association Model Code

During this review, several common themes among programs surfaced. These commonalities generally represent the spectrum of services, as well as specified roles for the Project Manager. To aid in discussion, common themes are organized into three categories, Project Served, Process, and Role of the Project Manager, and are outlined below:

### Project Served

- Projects are generally selected through an application process;
- Projects meeting certain development thresholds [size, value, jobs created] that would suggest increased complexity;
- Projects meeting public objectives [senior housing, affordable/workforce housing, economic development];
- Some projects may seek assistance at reduced service levels despite not meeting specified criteria.

Goal 1.2D: Create a framework for ongoing conversation and evaluation to provide for continual improvement of practices and policies. Strategies to achieve this goal include:

1. Begin quarterly meetings of external stakeholders and City Staff to continue open dialogue regarding needed process improvements, identify issues and monitor progress. Actions to execute this strategy include:
  - A. Assign staff responsible for organizing and participating in meetings
  - B. Maintain ongoing agenda of issues and create objectives for each meeting
  - C. Ensure timely follow-up on action items identified in meetings
  - D. Report metrics and benchmarks at each meeting
  - E. Provide annual progress report to City Council
2. Develop proactive customer survey to solicit ongoing feedback

#### **Process**

- Pre-development meeting(s) to define critical path customized for each development are generally required as an initial step in the process;
- Review generally involves a multidisciplinary review team. The team is sometimes assembled by the Project Manager based upon the needs of the project or is a set committee in the development review process;
- Concurrent permit reviews or consolidated development applications are available in some instances to streamline review and minimize conflicts among various approval processes;
- Heavy emphasis on clear communication is universal among programs, from setting clear expectations for submittals to project status and process timelines update availability.

#### **Role of the Project Manager**

- Act as a single point of contact throughout the entire development process, but are not generally responsible for any review authority;
- Generally regarded as an experts in development review, with some project manager teams emphasizing representation from a variety of development review disciplines to ensure that a full suite of expertise is available as part of the case management system;
- Serve as a proactive watchdog for the project's progress through the system;
- Bring innovative thinking to the equation and an attitude toward empowering and enabling development beyond simply serving enforcers of development requirements;
- Negotiates conflicts among review comments on behalf of the development project;
- Provides ongoing review and assessment of the development review process, with a mechanism to affect continued improvements.

## Desired Outcomes, Goals, Strategies and Actions

**Outcomes** are the overarching targets for the future performance of the development review process generated out of the work-group conversation.

**Goals** establish specific, measurable, attainable targets to guide implementation.

**Strategies** outline the steps necessary to achieve goals.

**Actions** provide further detail regarding critical path work items in some key instances.

Where appropriate, implementation activities are color coded in the following way in order to clarify specific responsibilities or areas of impact:

General Applicability

Building Inspections

CityDesign Studio/Long Range Planning

Current Planning

Economic Development

Engineering

Real Estate

## Coordination and Processes

A common concern was the time it took to gain approvals for a number of City processes, such as Platting, Engineering, Real Estate, and Zoning. The Q-Team is generally regarded as the gold standard in permit review, and held as a positive example of the potential for the Department. The desire is to evaluate current review practices and develop a more efficient process that compresses review timelines, minimizes conflicting issues, and improves the customer experience.

Additionally, a number of items relate to adopted policy. Changing these policies would require a longer and more deliberate conversation. There needs to be a mechanism to review and audit the Code periodically in a deliberate manner to identify and address overly onerous or outdated regulations and rules that do not comport with the City's vision and development objectives. There is an additional opportunity to ensure consistent applications of the rules.

## Where We Are

- Engineering developed a series of agreements to better describe expectations and performance requirements
- Engineering hired additional staff and reduced backlog
- Preliminary plat intake increased from 4 to 6 days per month
- Board of Adjustment intake grew to accommodate more cases
- The Q-team was expanded to two teams
- Zoning Review Team process was streamlined to improve reviews
- Zoning is establishing standardized checklists
- Electronic plan review implemented for building permits
- Zoning Ordinance Committee recommends changes to the Development Code with Current Planning staff support
- Development Code Amendments may be advanced to the front of the queue with payment of an application fee
- Gold Card program implemented for home builders to provide quicker service to high performing applicants



## Where We Are Going

### Outcome 2.1: The review process is reliable, efficient, and well-communicated, with clear expectations and timelines established at the outset

Goal 2.1A: Add predictability to the entire review process. Strategies to achieve this goal include:

1. Compress review and approval times, particularly with Final Plats through the following actions:
  - A. Develop detailed implementation strategy focused on pre-development functions
  - B. Conduct conversations with staff and development industry regarding Fire protection reviews and inspections to improve coordination and understanding
  - C. Clear backlog of plat reviews by Summer 2015
  - D. Once plat backlog has been cleared, commit to first and second round review times for projects requiring Engineering Review
  - E. As plat times are reduced, conduct an evaluation and make recommendations for appropriate use of Early Release program and revise criteria
  - F. Amend Fee Ordinance to add express review option to engineering review and review certain fees
  - G. Evaluate ability to phase the release of water meters prior to final acceptance
  - H. Establish PD experts in Building Inspections
  - I. Have zoning planners participate in complicated zoning reviews for permits
  - J. Review CAO forms for consistency and accuracy, particularly three-way contracts with water/wastewater and paving and drainage
2. Clarify criteria for certain reviews and better define involvement by other areas of the organization. Actions to execute this strategy include:
  - A. Work with Real Estate to define review approach for abandonments and licensing, and brief City Council, as well as

#### Focus: Final Plat Review Times

Farmers Branch: 10 day first review

Irving: 4-6 weeks total time

Plano: 8 weeks total time

Lewisville: 15 days first round review, 10 days second round review

Mesquite: 15 days first round review, 10 days second round review

define and document approach for all development reviews, including:

- i. Evaluate using master agreements or similar vehicles to create a pool of qualified candidates to conduct appraisals to eliminate bidding for the appraisal of each request
  - ii. Review internal routing list for Real Estate to clearly define which are required reviews vs. which are informational only and explore technology to streamline process
  - iii. Allow private contractors to obtain third-party utilities approvals for easements and ROW requests
- B. Evaluate and monitor effectiveness of revised Zoning Review Team process through communication with customers**
- C. Create an urban design vision that defines goals and principles for urban design performance of development projects to provide a clear guide for CityDesign Studio reviews**
3. Improve customer experience by improving intake process. Strategies to achieve this goal include:
- A. Work with DWU Credit Services to explore eliminating the requirement to file an open records request for applicant representatives to obtain tax lien statements required for zoning change applications**
  - B. Increase application intake for Board of Adjustment from 12 to 14 per month, with the discretion to take additional applications depending on complexity of projects on the docket**
  - C. Provide staff at OCMC to conduct pre-check/pre-screening of permit submittals for review and ensure bilingual services**
  - D. Encourage pre-application meetings for Real Estate applicants**

Goal 2.1B: Use Lean/Six Sigma process to establish and report on measurement standards in order to monitor effectiveness and efficiency of the entire development review process. Strategies to achieve this goal include:

1. Benchmark review processes and timelines against other cities
2. Project management team should continually recommend ways to enhance performance

3. Estimate the economic impact of delays

**Outcome 2.2: Best practices modeled by the Q-team are exported to other aspects of development review to improve coordinated, multi-disciplinary review for the entirety of the development review process**

Goal 2.2A: Create a comprehensive approach to project management that identifies critical path items across the City organization and responsible parties at the outset of each project. Strategies to achieve this goal include:

1. Convene summit of ACMs and Directors over all departments engaged in development review and approval, including DWU, Fire, Economic Development, Sustainable Development and Construction, Planning and Neighborhood Vitality, and City Attorney's Office. Meet quarterly to identify issues and ensure consistency in development review objectives
2. Project management team should continually evaluate best practice opportunities to implement

Goal 2.2B: Expand/enhance use of technology to allow for "real-time" interaction among public and private sector project team members. Strategies to achieve this goal include:

1. Continue implementation of electronic plan review for building permits and utilize coordinators or other staff as final point of contact to reconcile comments on plans
2. Continued rollout of e-plan review and other technology initiatives including:
  - Improved communication protocols for building permit review
  - Digitizing of archives for engineering drawings
  - Zoning intake log online, indicating application status

**Focus: Q-Team**

The Q-Team was created to provide customers an increased level of service and shortened review times for a fee. The methodology is to bring together various trades reviewing a project into an interactive setting with the applicant and their design team. The stated goal at the beginning of each session is to end the meeting with the issuance of a permit or, at a minimum, have a definitive list of project deficiencies that provide a clear set of actions in order to receive a permit. In fact, approximately half of the projects reviewed successfully receive their permit same-day, and all projects realize a significant time savings during review. The interactive dialogue provides a better understanding of the project and code requirements for both parties, and the multi-disciplinary approach eliminates conflicts and streamlines review. This process is highly regarded and should be exploited and exported to other facets of the Department's review functions.

## **Outcome 2.3: Appropriate and relevant regulations are consistently applied to advance the vision of our City.**

Goal 2.3A: Align Codes with current best practices and Dallas development objectives and create an inventory and priority for desired code improvements. Strategies to achieve this goal include:

1. Identify needed amendments to the Development Code for consideration by City Council
2. Assemble a Code Review Team to develop needs inventory of Development Code changes. Items previously identified include:
  - Platting regulations: Developer bond requirements, monumentation requirements, abandonment of easements, and off-site easements
  - Updates to the Green Building ordinance

Goal 2.3C: Provide a mechanism to document and publish rule interpretations for greater transparency and improved consistency in rule application. A strategy to achieve this goal includes:

1. Develop and maintain an interpretations manual for consistent application of City Code

## Communication, Training, and Outreach

Better communication is a key element to improving customer service and customer expectations of the review process. Further, there have been a number of improvements and initiatives put in place that need to be better communicated to the development community. A two-pronged communication program can market the City and positive changes, as well as identify and resolve internal communication breakdowns. A lack of consistency among Staff interpretations of the Code could be resolved through increased training opportunities, which is especially important given the share of Department staff that are relatively new. Lastly, ensuring that customers are fully aware of requirements that, if met, will simplify and streamline their experience needs specific attention and focus.

### Where We Are

- Zoning has launched online portal to track zoning cases
- Engineering has begun process to review and revise their collateral material to clearly outline requirements
- Training initiatives have been expanded in the following areas: certification and training for Building Inspections staff; additional training opportunities for staff and the industry through City University; training for third party inspectors for Engineering reviews
- Bluebeam has been procured as platform for interactive electronic plan review, creating the opportunity to have real-time access to comments needing resolution for projects to advance to approval
- Permit records are going digital to improve customer access to information

## Desired Outcomes, Goals, Strategies and Actions

**Outcomes** are the overarching targets for the future performance of the development review process generated out of the work-group conversation.

**Goals** establish specific, measurable, attainable targets to guide implementation.

**Strategies** outline the steps necessary to achieve goals.

**Actions** provide further detail regarding critical path work items in some key instances.

Where appropriate, implementation activities are color coded in the following way in order to clarify specific responsibilities or areas of impact:

General Applicability  
Building Inspections  
CityDesign Studio/Long Range  
Planning  
Current Planning  
Economic Development  
Engineering  
Real Estate

## Where We Are Going

### Outcome 3.1: An overall communication strategy and protocols that are succinct, user-friendly and consistent, and branded across all development-related divisions guides communication and associated collateral

Goal 3.1A: Improve the City's communications to the private sector to enhance customer knowledge of the process and understanding of requirements and responsibilities. Strategies to achieve this goal include:

1. Create permanent working group composed of key City Staff and private sector stakeholders to discuss issues, monitor progress, and raise awareness of updated city processes and market conditions
2. Establish customer feedback processes
3. Publish updated review time targets and work with Lean/Six Sigma team to develop efficiency metrics to track performance across all departments
4. Clearly articulate CityDesign Studio/Peer Review function in development review process
5. Improve communication protocols for building permit review to ensure two-way communication and improve transparency, including clarifying level of research and performance necessary for applicants

Goal 3.1B: Create comprehensive communication and branding strategy. Strategies to achieve this goal include:

1. Develop and implement a strategy, and create associated collateral materials to improve communication, education, and outreach
2. Update real estate brochures, checklists and protocols to provide more accurate timelines and required steps for abandonment procedures. Actions to execute this strategy include:
  - A. Update current brochure as part of larger communications strategy, and provide more accurate timelines and required steps/reviews necessary for abandonment procedures
  - B. Develop a calendar showing submittal and review deadlines for each Council action meeting
  - C. Develop checklist for private development reviews of Real Estate requests
  - D. Develop pre-submittal checklist to better communicate required due diligence before submitting an application for abandonment or licensing
3. Update Development Guide
4. Create new application forms that better describe revised processes and requirements, including requiring a pre-application meeting for Planned Development District requests to improve review process
5. Regularly review and update City website for accuracy and customer-friendly web presence, and explore creating a “one-stop” website for all development review functions

Goal 3.1C: Further expand the use of technology to improve communication. Strategies to achieve this goal include:

1. Digitize archive for engineering drawings that can be made readily available to assist in applicant research, including adding recent plans by working with Public Works and Transportation to obtain information regarding recent bond project construction
2. Place zoning intake log online, and indicate application status
3. Investigate which GIS layers would not pose public safety concerns if available to the public and provide more efficient access to these and other record drawings
4. Ensure that trade and building inspectors are consistently using technology to communicate with customers to schedule inspections

### **Outcome 3.2: Cross-disciplinary learning opportunities for City employees to enhance understanding of all areas of the development process ensures consistent staff performance**

Goal 3.2A: Utilize training to ensure consistent staff performance within and across departments. Strategies to achieve this goal include:

1. Hold periodic Brown Bag lunches for continuing educational opportunities regarding: 1) New Code interpretations; 2) Review experiences from complicated development cases to encourage an interactive dialogue regarding lessons learned; 3) Major zoning cases, newly adopted complicated PDs, or Code Amendments; 4) Industry advancements; and 5) General issues relating to the development process.
2. Explore a ride-along program between plans examiners and field inspectors to improve understanding and increase consistency of interpretations



### **Outcome 3.3: Proactive educational opportunities for the private sector are readily available and well publicized, improving knowledge of process requirements**

Goal 3.3A: Improve accuracy of customer expectations. Strategies to achieve this goal include:

1. Develop commitment to city review times for each process and publish online and in the updated development guide
2. Publish average review times monthly to improve accountability and transparency in the process
3. Explore posting live/real time wait times for various requests at the permit center online
4. For processes with limited intake allowed, publish the number of applications submitted
5. Include routing guides as part of updated development guide

Goal 3.3B: Improve customer knowledge and understanding of Dallas development requirements. Strategies to achieve this goal include:

1. Create regularly recurring "Development 101" Symposiums, as well as informational sessions/town halls with professional organizations throughout Dallas
2. Work with industry representatives to communicate shared responsibility to achieve program enhancements
3. Create a communication and training curriculum geared toward all customers from large to small
4. Issue "Top 10 List" of most common causes for delays in the development review process

# Strategic Implementation Plan



## Category: Organization and Culture

### OUTCOME 1.1: THE DEVELOPMENT REVIEW PROCESS EXEMPLIFIES A COLLABORATIVE CULTURE FOCUSED ON INNOVATION AND PROBLEM-SOLVING

Goal 1.1A: Build team attitude and collaborative mindset among staff. Strategies to achieve this goal include:

Strategy 1. Develop multi-year program that engages development review staff across the organization to instill organization values focused on customer service, efficiency, transparency, and innovation	CMO, SDC	FY17+
Strategy 2. Hold periodic Department-wide Town Halls to encourage two-way communication	SDC	FY16
Strategy 3. Build accountability and responsiveness as a key measure in staff performance reviews.	HR	FY16

Goal 1.1B: Address hiring to more effectively respond to market demands, and empower staff to troubleshoot and problem solve. Strategies to achieve this goal include:

Strategy 1. Fill key vacancies in all departments and hire temporary staffing and/or third party contract personnel to address backlogs	SDC	4QFY15
Strategy 2. Anticipate retirements and double-fill positions when possible	SDC	Ongoing
Strategy 3. Continue evaluating salary scale to stay competitive in the market	HR	Ongoing

### OUTCOME 1.2: THE ORGANIZATIONAL STRUCTURE IS ALIGNED TO OPERATE IN A TRANSPARENT, EFFICIENT AND CUSTOMER-FOCUSED MANNER

Goal 1.2A: Capitalize on opportunities of newly focused Department of Sustainable Development and Construction. Strategies to achieve this goal include:

Strategy 1. Develop Departmental Mission, Values, and Strategic Plan through collaborative dialogue across the Department	SDC, CPE	FY16
Strategy 2. Ensure that new performance measures include metrics to emphasize customer service, efficiency and innovation	CPE	FY16
Strategy 3. Evaluate organizational and reporting structure of the newly focused Sustainable Development and Construction Department in order to best execute revised Departmental Mission, Values, and Strategic Plan	CMO, SDC	FY16

\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, [Building Inspections](#), [CityDesign Studio/Long Range Planning](#), [Current Planning](#), [Economic Development](#), [Engineering](#), [Real Estate](#)

**Goal 1.2B: Create project champions to encourage seamless development review process. Strategies to achieve this goal include:**

Strategy 1. Assemble a permanent project management team focused on enhancing development review that is responsible for: 1) Advancing initiatives outlined in this document; 2) Providing comprehensive development coordination to facilitate projects through the entire spectrum of development review; and 3) Providing feedback loop to identify additional opportunities for enhanced service	CMO, OED, SDC	3QFY15	
Strategy 2. Partner with Small Business Resource Center and other Office of Economic Development staff to review needs for small businesses and complicated projects	OED, SDC	FY16	
Strategy 3. Define the scope of services that are provided by the recently created concierge program	SDC	FY15	

**Goal 1.2C: Provide a conducive environment to support a “one-stop-shop” mindset and facilitate a coordinated work environment and customer service goals. Strategies to achieve this goal include:**

Strategy 1. Identify immediate space needs as well as functions that benefit from physical proximity	SDC, EBS	Ongoing	
Strategy 2. Find cost effective solution to address long-term space needs	SDC, EBS	FY16	

**Goal 1.2D: Create a framework for ongoing conversation and evaluation to provide for continual improvement of practices and policies. Strategies to achieve this goal include:**

Strategy 1. Begin quarterly meetings of external stakeholders and City Staff to continue open dialogue regarding needed process improvements, identify issues and monitor progress. Actions to execute this strategy include:	Action A. Assign staff responsible for organizing and participating in meetings	SDC, OED, CMO (new project management team)	FY15	
	Action B. Maintain ongoing agenda of issues and create objectives for each meeting	OED, SDC, CMO	FY15	
	Action C. Ensure timely follow-up on action items identified in meetings	OED, CMO	FY15	
	Action D. Report metrics and benchmarks at each meeting	CMO, CPE	FY15	
	Action E. Provide annual progress report to City Council	CMO	FY16	
Strategy 2. Develop proactive customer survey to solicit ongoing feedback	SDC	FY16		

\*Legend: CAO = City Attorney’s Office; CIS = Communication and Information Services; CMO = City Manager’s Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

## Category: Coordination and Processes

### OUTCOME 2.1: THE REVIEW PROCESS IS RELIABLE, EFFICIENT, AND WELL-COMMUNICATED, WITH CLEAR EXPECTATIONS AND TIMELINES ESTABLISHED AT THE OUTSET

Goal 2.1A: Add predictability to the entire review process. Strategies to achieve this goal include:

Strategy 1. Compress review and approval times, particularly with Final Plats through the following actions:	Action A. Develop detailed implementation strategy focused on pre-development functions	SDC, OED	1QFY16	
	Action B. Conduct conversations with staff and development industry regarding Fire protection reviews and inspections to improve coordination and understanding	SDC, Fire	4QFY15	
	Action C. Clear backlog of plat reviews by Summer 2015 by completing cursory review and identifying major deficiencies	SDC	4QFY15	
	Action D. Once plat backlog has been cleared, commit to first and second round review times for projects requiring Engineering Review	SDC	1QFY16	
	Action E. As plat times are reduced, conduct an evaluation and make recommendations for appropriate use of Early Release program and revise criteria	SDC, CMO	FY17+	
	Action F. Amend Fee Ordinance to add express review option to engineering review and review certain fees	SDC, CAO	FY16	
	Action G. Evaluate ability to phase the release of water meters prior to final acceptance	SDC, DWU	FY17+	
	Action H. Establish PD experts in Building Inspections	SDC	FY17+	
	Action I. Have zoning planners participate in complicated zoning reviews for permits	SDC	FY17+	
	Action J. Review CAO forms for consistency and accuracy, particularly three-way contracts with water/wastewater and paving and drainage	SDC, CAO	FY17+	

\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, City/Design Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

	Actions [Where Detailed]	Lead Partners	Target Date	Review Function*
Strategy 2. Clarify criteria for certain reviews and better define involvement by other areas of the organization. Actions to execute this strategy include:	Action A. Work with Real Estate to define review approach for abandonments and licensing, and brief City Council, as well as define and document approach for all development reviews, including: i. Evaluate using master agreements or similar vehicles to create a pool of qualified candidates to conduct appraisals to eliminate bidding for the appraisal of each request; ii. Review internal routing list for Real Estate to clearly define which are required reviews vs. which are informational only and explore technology to streamline process; and iii. Allow private contractors to obtain third-party utilities approvals for easements and ROW requests.	SDC, OED	FY16	
	Action B. Evaluate and monitor effectiveness of revised Zoning Review Team process through communication with customers	SDC	FY16	
	Action C. Create an urban design vision that defines goals and principles for urban design performance of development projects to provide a clear guide for City-Design Studio reviews	PNV, CMO	FY16	
Strategy 3. Improve customer experience by improving intake process. Strategies to achieve this goal include:	Action A. Work with DWU Credit Services to explore eliminating the requirement to file an open records request for applicant representatives to obtain tax lien statements required for zoning change applications	SDC, DWU	FY16	
	Action B. Increase application intake for Board of Adjustment from 12 to 14 per month, with the discretion to take additional applications depending on complexity of projects on the docket	SDC	FY16	
	Action C. Provide staff at OCMC to conduct pre-check/pre-screening of permit submittals for review and ensure bilingual services	SDC	FY17+	
	Action D. Encourage pre-application meeting for Real Estate with applicants	SDC	FY16	

\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

Goal 2.1B: Use Lean/Six Sigma process to establish and report on measurement standards in order to monitor effectiveness and efficiency of the entire development review process. Strategies to achieve this goal include:

Strategy 1. Benchmark review processes and timelines against other cities	OED, CPE, SDC	FY16	
Strategy 2. Project management team should continually recommend ways to enhance performance	OED, CPE, SDC	Ongoing	
Strategy 3. Estimate the economic impact of delays	OED	FY16	

**OUTCOME 2.2: BEST PRACTICES MODELED BY THE Q-TEAM ARE EXPORTED TO OTHER ASPECTS OF DEVELOPMENT REVIEW TO IMPROVE COORDINATED, MULTI-DISCIPLINARY REVIEW FOR THE ENTIRETY OF THE DEVELOPMENT REVIEW PROCESS**

Goal 2.2A: Create a comprehensive approach to project management that identifies critical path items across the City organization and responsible parties at the outset of each project. Strategies to achieve this goal include:

Strategy 1. Convene summit of ACMs and Directors over all departments engaged in development review and approval, including DWU, Fire, Economic Development, Sustainable Development and Construction, Planning and Neighborhood Vitality, and City Attorney's Office. Meet quarterly to identify issues and ensure consistency in development review objectives	CMO	4QFY15	
Strategy 2. Project management team should continually evaluate best practice opportunities to implement	OED, CMO, SDC	Ongoing	

Goal 2.2B: Expand/enhance use of technology to allow for "real-time" interaction among public and private sector project team members. Strategies to achieve this goal include:

Strategy 1. Continue implementation of electronic plan review for building permits and utilize coordinators or other staff as final point of contact to reconcile comments on plans	SDC, CIS	FY15	
Strategy 3. Continued rollout of e-plan review and other technology initiatives including:	Improved communication protocols for building permit review	SDC	FY16
	Digitizing of archives for engineering drawings	SDC, CIS	FY16
	Zoning intake log online, indicating application status	SDC, CIS	FY15

**OUTCOME 2.3: APPROPRIATE AND RELEVANT REGULATIONS ARE CONSISTENTLY APPLIED TO ADVANCE THE VISION OF OUR CITY.**

Goal 2.3A: Align Codes with current best practices and Dallas development objectives and create an inventory and priority for desired code improvements. Strategies to achieve this goal include:

Strategy 1. Identify needed amendments to the Development Code for consideration by City Council	SDC, PNV, CAO	Ongoing	
--	---------------	---------	--

\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

Actions [Where Detailed]	Lead Partners	Target Date	Review Function*
Strategy 2. Assemble a Code Review Team to develop needs inventory of Development Code changes. Items previously identified include: i. Platting regulations such as developer bond requirements, monumentation requirements, abandonment of easements, and off-site easements; and ii. Updates to the Green Building ordinance.	SDC, CAO	FY16	
<b>GOAL 2.3B: PROVIDE A MECHANISM TO DOCUMENT AND PUBLISH RULE INTERPRETATIONS FOR GREATER TRANSPARENCY AND IMPROVED CONSISTENCY IN RULE APPLICATION. A STRATEGY TO ACHIEVE THIS GOAL INCLUDES:</b>			
Strategy 1. Develop and maintain an interpretations manual for consistent application of City Code	SDC, CAO	FY17+	

## Category: Communication, Training, and Outreach

**OUTCOME 3.1: AN OVERALL COMMUNICATION STRATEGY AND PROTOCOLS THAT ARE SUCCINCT, USER-FRIENDLY AND CONSISTENT, AND BRANDED ACROSS ALL DEVELOPMENT-RELATED DIVISIONS GUIDES COMMUNICATION AND ASSOCIATED COLLATERAL**

**Goal 3.1A: Improve the City’s communications to the private sector to enhance customer knowledge of the process and understanding of requirements and responsibilities. Strategies to achieve this goal include:**

Strategy 1. Create permanent working group composed of key City Staff and private sector stakeholders to discuss issues, monitor progress, and raise awareness of updated city processes and market conditions	OED, CMO, SDC	4QFY15	
Strategy 2. Establish customer feedback processes	SDC, CPE, CMO	FY16	
Strategy 3. Publish updated review time targets and work with Lean/Six Sigma team to develop efficiency metrics to track performance across all departments	CPE, CMO, SDC	FY16	
Strategy 4. Clearly articulate of CityDesign Studio/Peer Review function in development review process	PNV	4QFY15	
Strategy 5. Improve communication protocols for building permit review to ensure two-way communication and improve transparency, including clarifying level of research and performance necessary for applicants	SDC	FY16	

**Goal 3.1B: Create comprehensive communication and branding strategy. Strategies to achieve this goal include:**

Strategy 1. Develop and implement a strategy, and create associated collateral materials to improve communication, education, and outreach	SDC, OED, PIO	1QFY16	
--	---------------	--------	--

\*Legend: CAO = City Attorney’s Office; CIS = Communication and Information Services; CMO = City Manager’s Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate



	Actions [Where Detailed]	Lead Partners	Target Date	Review Function*
Strategy 2. Update real estate brochures, checklists and protocols to provide more accurate timelines and required steps for abandonment procedures. Actions to execute this strategy include:	Action A. Update current brochure as part of larger communications strategy, and provide more accurate timelines and required steps/reviews necessary for abandonment procedures	SDC, PIO	FY16	
	Action B. Develop a calendar showing submittal and review deadlines for each Council action meeting	SDC	FY16	
	Action C. Develop checklist for private development reviews of Real Estate requests	SDC	FY16	
	Action D. Develop pre-submittal checklist to better communicate required due diligence before submitting an application for abandonment or licensing	SDC	FY16	
Strategy 3. Update Development Guide		SDC, PIO	FY16	
Strategy 4. Create new application forms that better describe revised processes and requirements, including requiring a pre-application meeting for Planned Development District requests to improve review process		SDC	FY16	
Strategy 5. Regularly review and update City website for accuracy and customer-friendly web presence, and explore creating a "one-stop" website for all development review functions		SDC, CIS, PIO	Ongoing	
<b>Goal 3.1C: Further expand the use of technology to improve communication. Strategies to achieve this goal include:</b>				
Strategy 1. Digitize archive for engineering drawings that can be made readily available to assist in applicant research, including adding recent plans by working with Public Works and Transportation to obtain information regarding recent bond project construction		SDC, PWT, CIS	FY16	
Strategy 2. Place zoning intake log online, and indicate application status		SDC	FY16	
Strategy 3. Investigate which GIS layers would not pose public safety concerns if available to the public and provide more efficient access to these and other record drawings		SDC	FY17+	
Strategy 4. Ensure that trade and building inspectors are consistently using technology to communicate with customers to schedule inspections		SDC	FY17+	

\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

**OUTCOME 3.2: CROSS-DISCIPLINARY LEARNING OPPORTUNITIES FOR CITY EMPLOYEES TO ENHANCE UNDERSTANDING OF ALL AREAS OF THE DEVELOPMENT PROCESS ENSURES CONSISTENT STAFF PERFORMANCE**

**Goal 3.2A: Utilize training to ensure consistent staff performance within and across departments. Strategies to achieve this goal include:**

Strategy 1. Hold periodic Brown Bag lunches for continuing educational opportunities regarding: 1) New Code interpretations; 2) Review experiences from complicated development cases to encourage an interactive dialogue regarding lessons learned; 3) Major zoning cases, newly adopted complicated PDs, or Code Amendments; 4) Industry advancements; and 5) General issues relating to the development process.	SDC	FY16	
Strategy 2. Explore a ride-along program between plans examiners and field inspectors to improve understanding and increase consistency of interpretations	SDC	FY17+	

**OUTCOME 3.3: PROACTIVE EDUCATIONAL OPPORTUNITIES FOR THE PRIVATE SECTOR ARE READILY AVAILABLE AND WELL PUBLICIZED, IMPROVING KNOWLEDGE OF PROCESS REQUIREMENTS**

**Goal 3.3A: Improve accuracy of customer expectations. Strategies to achieve this goal include:**

Strategy 1. Develop commitment to city review times for each process and publish online and in the updated development guide	CPE, SDC, CMO	FY16	
Strategy 2. Publish average review times monthly to improve accountability and transparency in the process	SDC	FY16	
Strategy 3. Explore posting live/real time wait times for various requests at the permit center online	SDC	FY16	
Strategy 4. For processes with limited intake allowed, publish the number of applications submitted	SDC	FY16	
Strategy 5. Include routing guides as part of updated development guide	SDC, PIO	FY16	

**Goal 3.3B: Improve customer knowledge and understanding of Dallas development requirements. Strategies to achieve this goal include:**

Strategy 1. Create regularly recurring "Development 101" Symposiums, as well as informational sessions/town halls with professional organizations throughout Dallas	SDC, OED, CMO	FY15	
Strategy 2. Work with industry representatives to communicate shared responsibility to achieve program enhancements	SDC, OED, CMO	Ongoing	
Strategy 3. Create a communication and training curriculum geared toward all customers from large to small	SDC, CMO	FY16	
Strategy 4. Issue "Top 10 List" of most common causes for delays in the development review process	SDC, PIO	FY16	

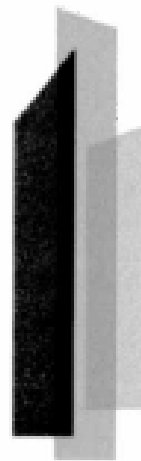
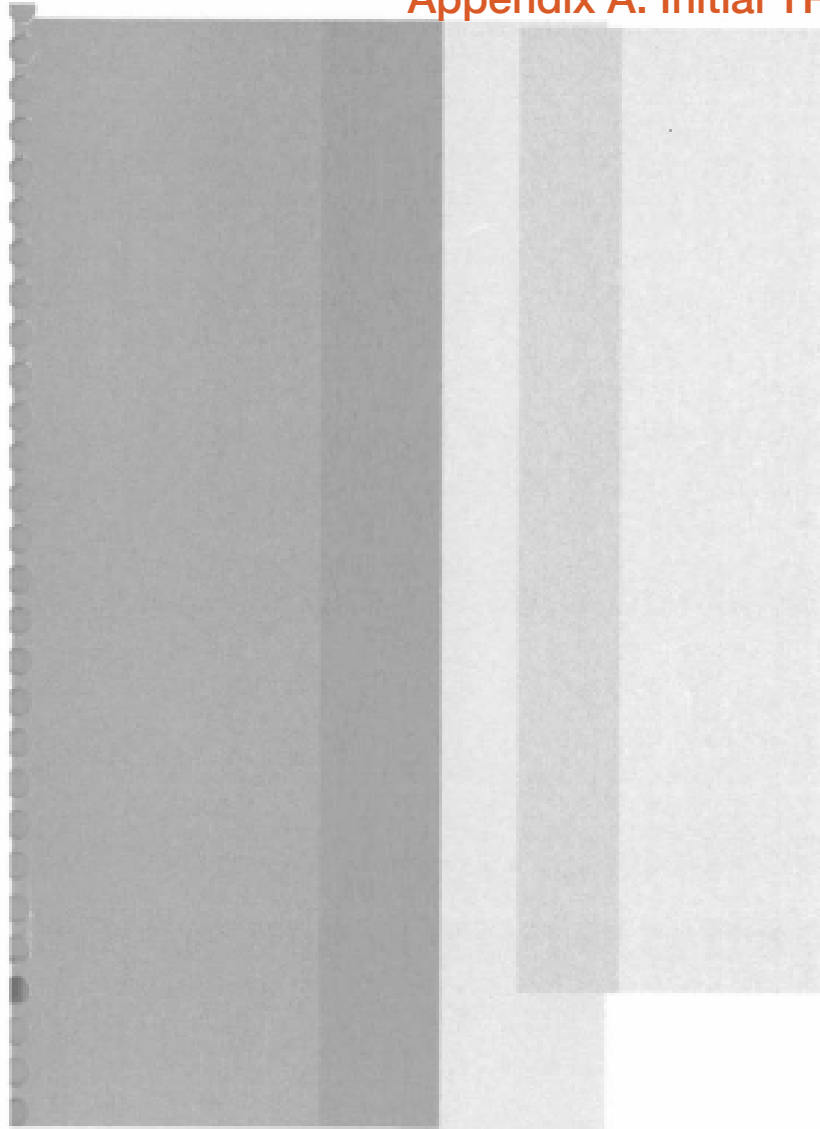
\*Legend: CAO = City Attorney's Office; CIS = Communication and Information Services; CMO = City Manager's Office; CPE = Center for Performance Excellence; DWU = Dallas Water Utilities; EBS = Equipment and Building Services; HR = Human Resources; OED = Office of Economic Development; PIO = Public Information Office; PNV = Planning and Neighborhood Vitality; SDC = Sustainable Development and Construction

\*Legend: General Applicability, Building Inspections, CityDesign Studio/Long Range Planning, Current Planning, Economic Development, Engineering, Real Estate

# Appendix



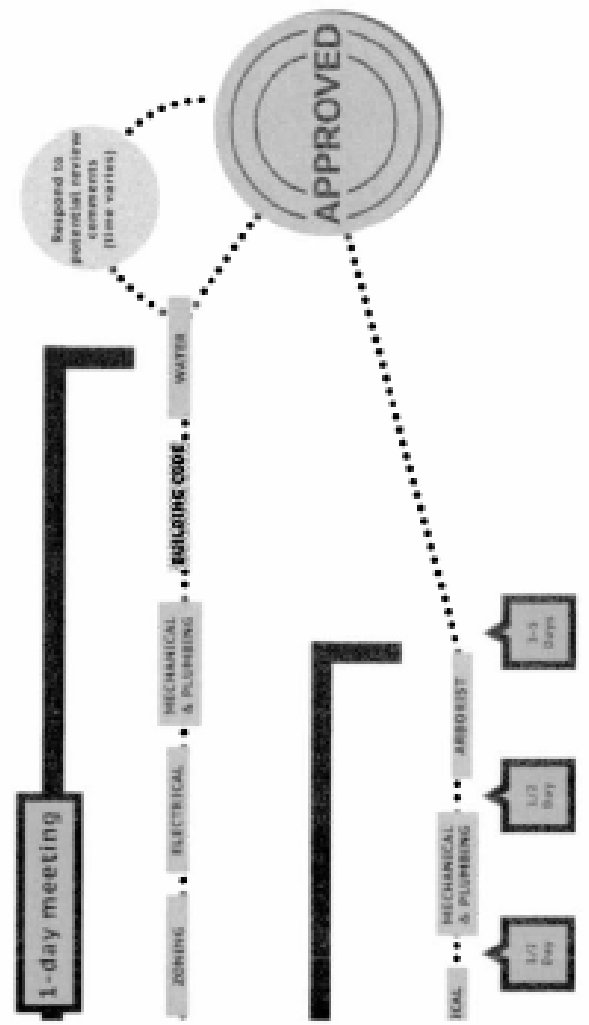
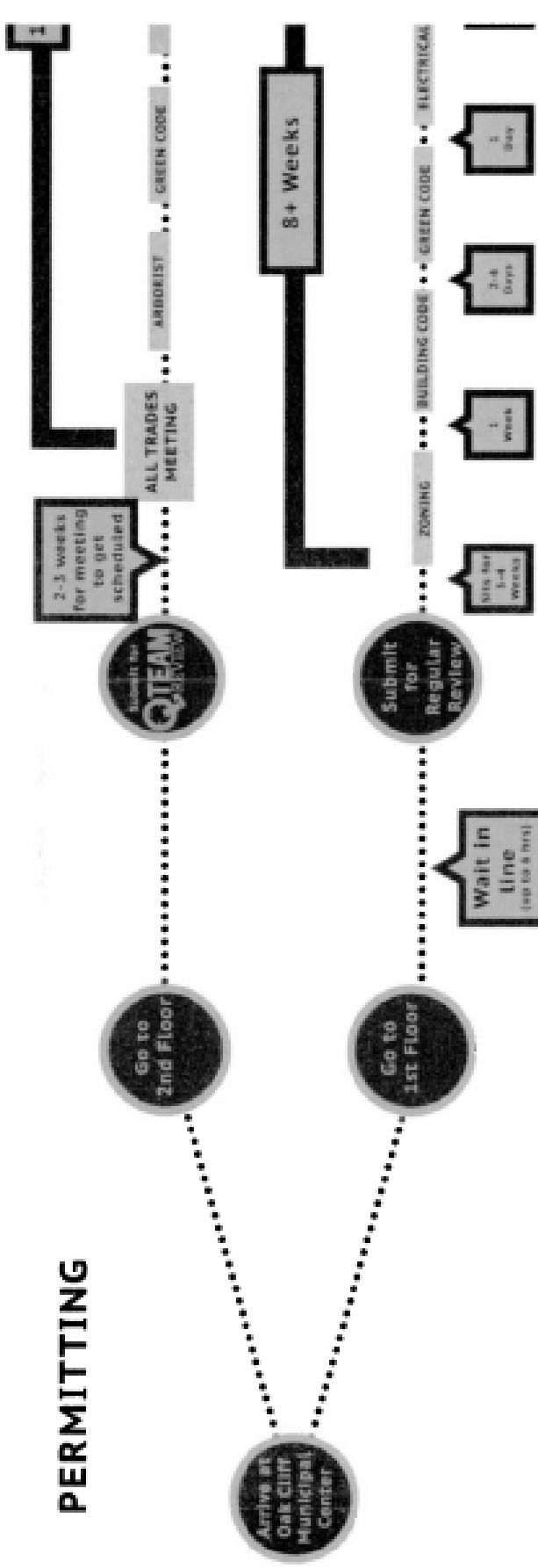
## Appendix A. Initial TREC report



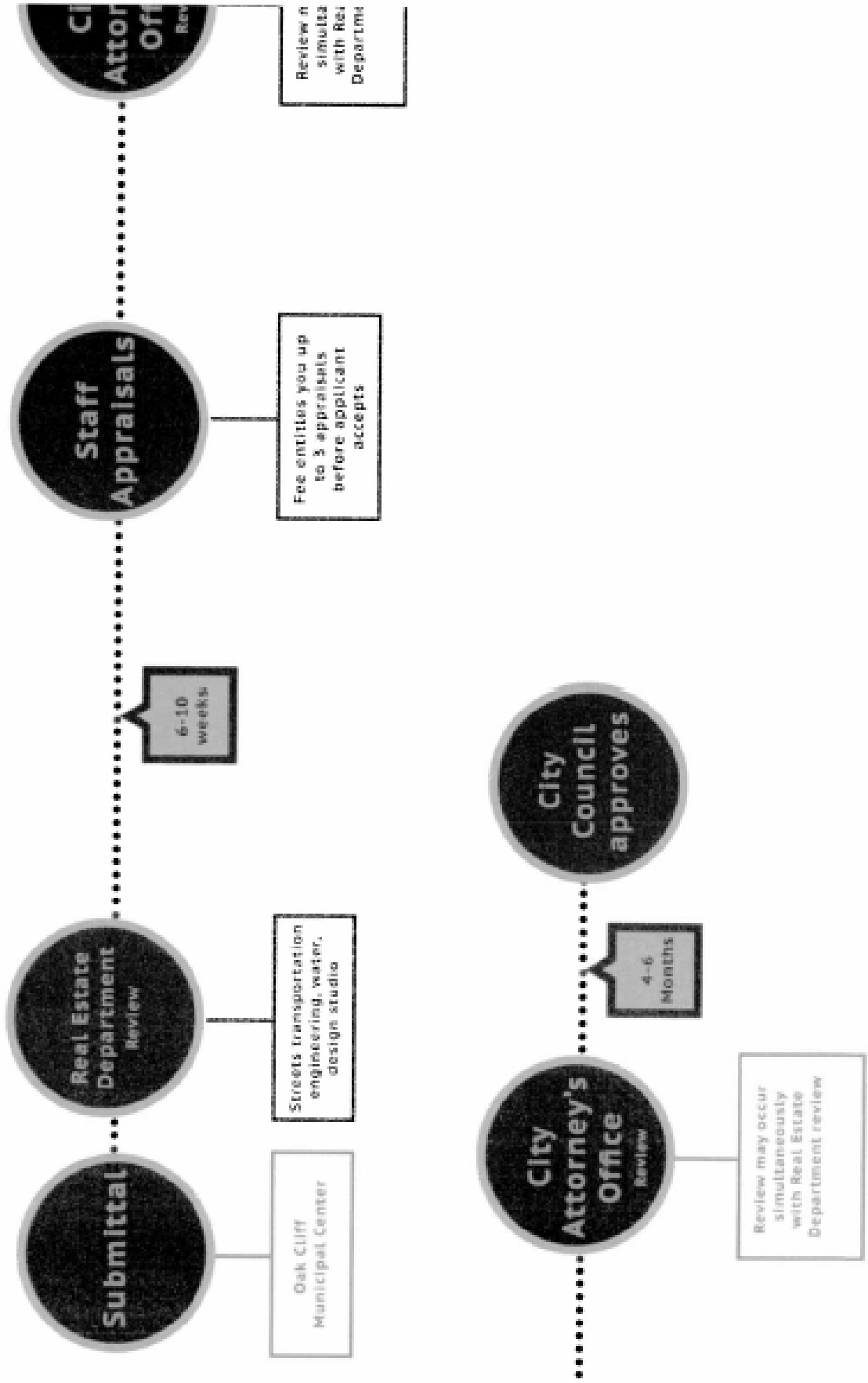
*the*  
**REAL ESTATE  
COUNCIL**

Dallas City Hall Development Process Improvement Project  
September 2014

# PERMITTING

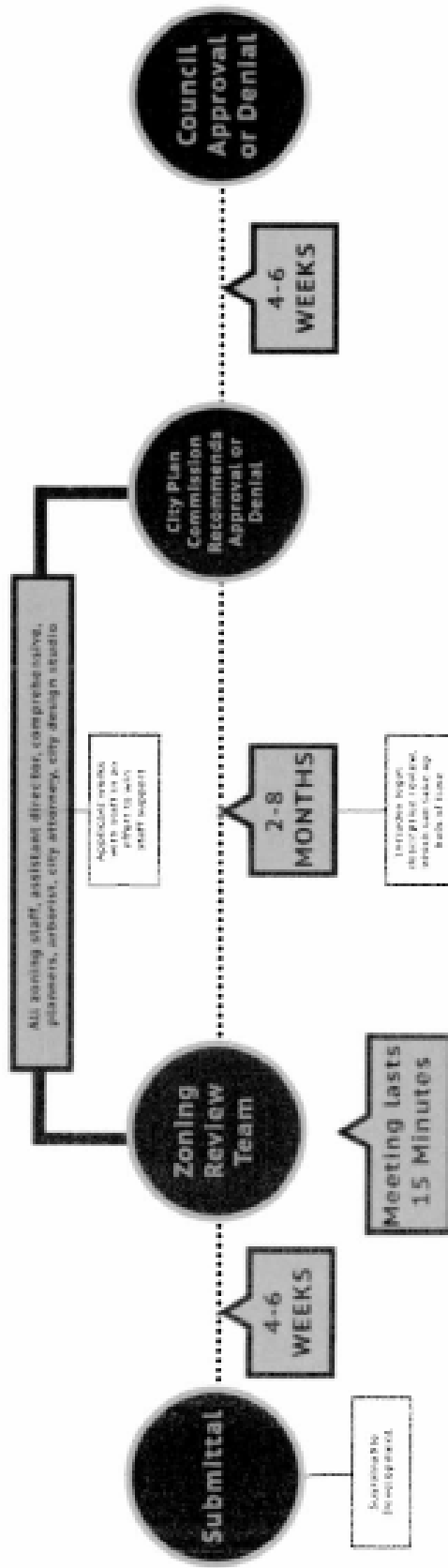


# ABANDONMENT/ LICENSES/ EASEMENTS/ RIGHT-OF-WAY DEDICATIONS

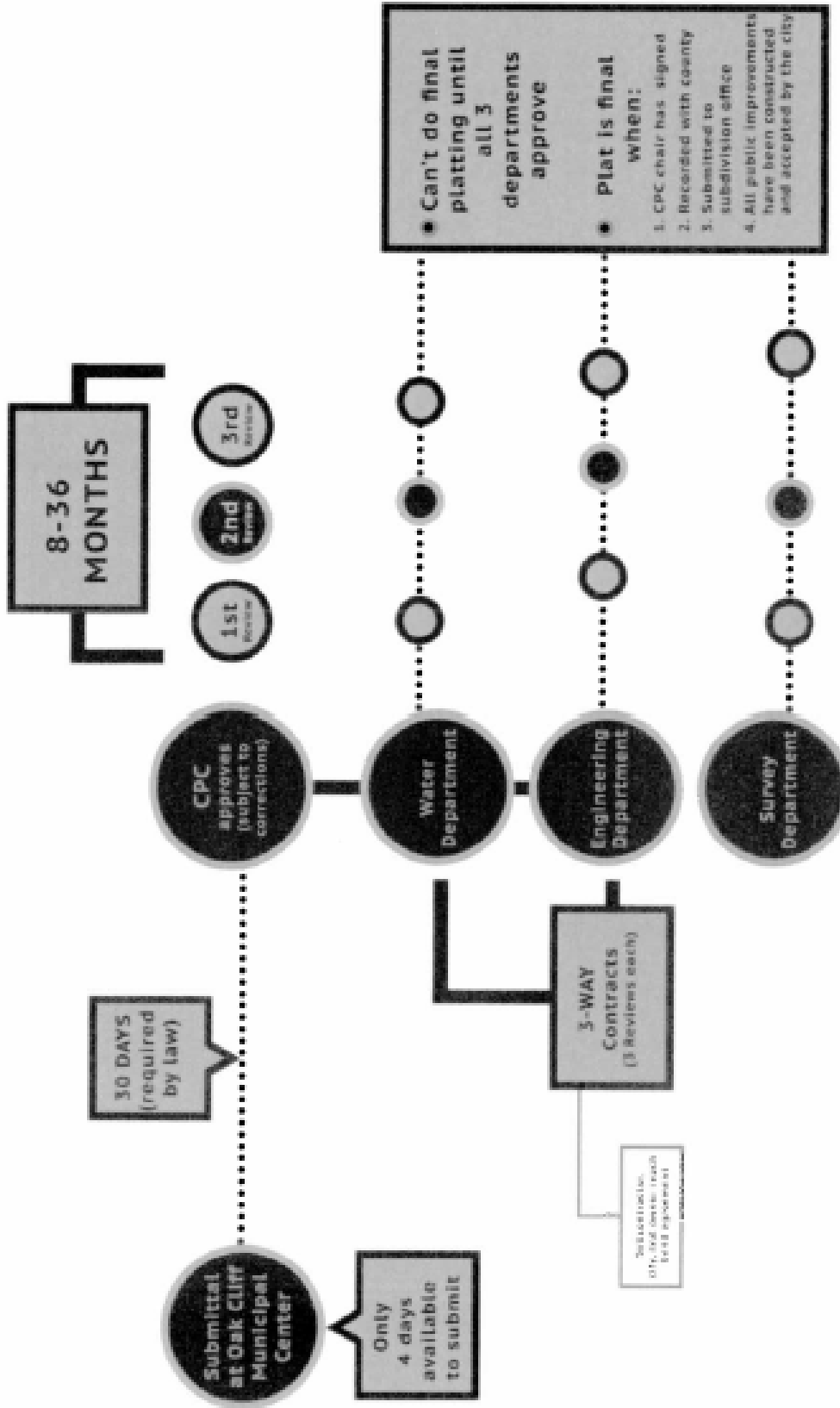




# ZONING

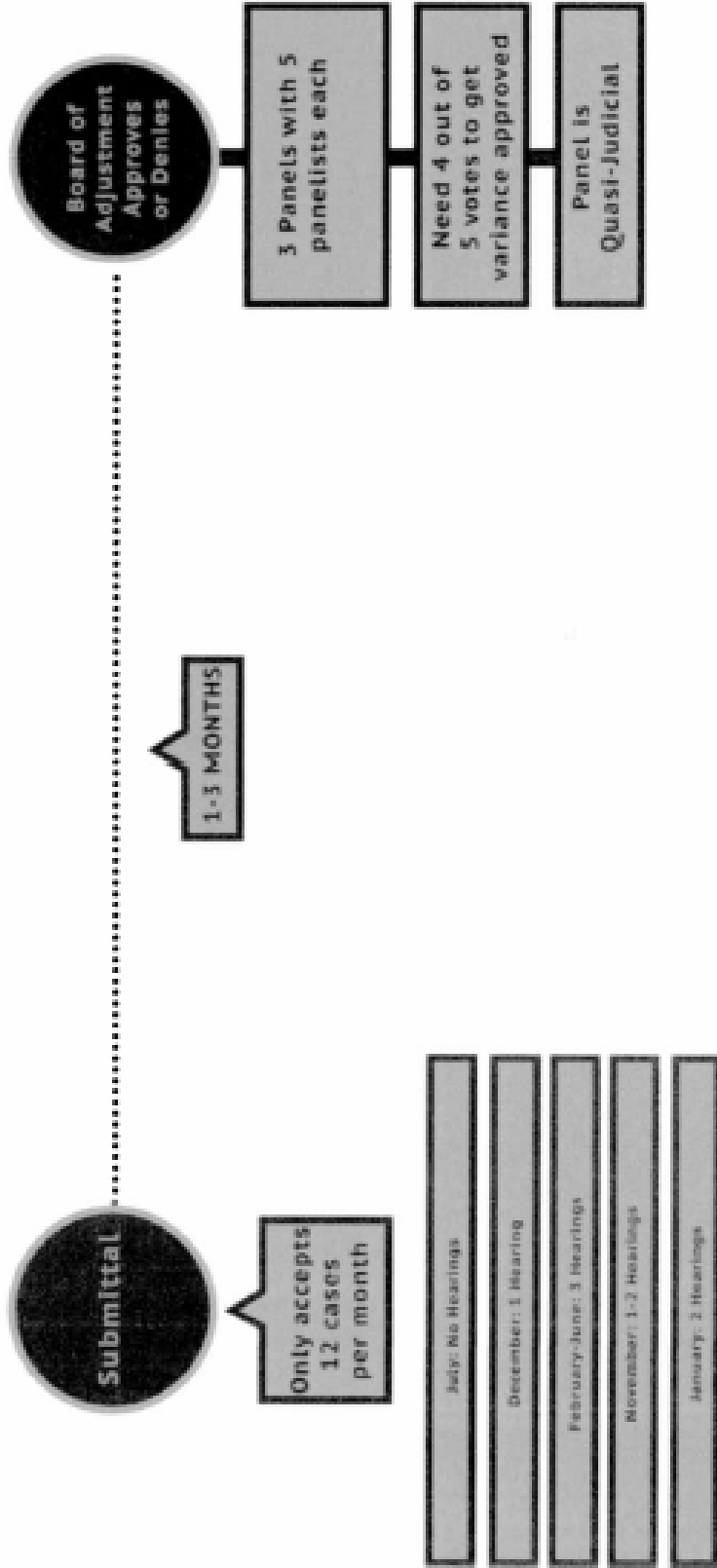


# PLATTING





# Board of Adjustment





## RECOMMENDATIONS FOR EFFICIENCY IN THE DEVELOPMENT PROCESS September, 2014

### PERMITTING

**Problem:** No clear guidance on where to go or which line to wait in to submit application.

**Solution:** Provide concierge option at entrance to guide applicants to appropriate line.

**Problem:** Language barrier for non-English speaking applicants.

**Solution:** Hire more bi-lingual staff, especially at entrance/concierge area.

**Problem:** The regular review process and the utilities review process are extremely time-consuming.

**Solution:** Create clear performance goals/metrics for staff-review time. Stagger lunch hours so that staff is not gone all at once. Implement communication process among departments and trades.

**Problem:** Inconsistent application of the rules despite certain precedents already in place.

**Solution:** Uniform training for all personnel to ensure continuity.

**Problem:** Engineering is taking way too long.

**Solution:** Hire more personnel or outsource.

ABANDONMENTS  
/LICENSES  
/EASEMENT  
DEDICATION

**Problem:** Time-consuming process that holds entire development hostage.

**Solution:** Create clear performance goals/metrics for staff-review time. Consider a Q-Team process for abandonments. Allow abandonment of easement by plat when the easement was dedicated by plat. Create a comments check-list and if the comments are not timely (according to metrics), the abandonment is deemed approved. Hire a facilitator or account manager.

**Problem:** Scope of review is too broad in City Attorney's office.

**Solution:** Keep attorneys on task and focused on format and compliance of abandonment. Staff should be empowered to help keep attorneys on task.

PLATTING

**Problem:** Heavily understaffed, especially in 3-way contracts.

**Solution:** Hire more staff to facilitate 3-way contracts.

**Problem:** Inspections for Construction is understaffed.

**Solution:** Consider 3rd party reviews through engineering or survey firms to approve design plans and plats. Expand city inspections forces to include paving and storm sewer inspection.

**Problem:** Submittals allowed only 4 days per month.

**Solution:** Allow more days for submittals.

**Problem:** Platting process is delayed because Development Bond is not in place.

**Solution:** Allow final plat to be filed once the public contracts are finalized. Do not delay platting process because Development Bond is not in place. Create specific timeline for process.

**ZONING:**

**Problem:** Zoning Review Team meetings are not as effective as they could be.  
**Solution:** Allow applicant to speak at meetings and make the meetings interactive to avoid misinterpretation or confusion.

**Problem:** Legal description takes too long and no specific information is provided.  
**Solution:** Create metrics for timely performance. Specify what is wrong with legal description. Ensure that planning department is sending information to city attorneys' office in a timely manner.

**Problem:** Once an application is submitted, the applicant is not given any timeframe for which the hearing is expected to take place at the City Plan Commission (CPC). Oftentimes, the hearing date is not scheduled for many months.  
**Solution:** Set a date for the CPC hearing at the time the application is submitted.

**BOARD OF ADJUSTMENT:**

**Problem:** Not enough spots available to apply for hearing.  
**Solution:** Needs to meet more often and allow more than 12 cases per month.

**CITY DESIGN STUDIO:**

**Problem:** No clear function or direction, even though all zoning is funneled through this department.  
**Solution:** Set clear expectations and guidelines for the purpose and process of the studio. The studio should not have the authority to recommend denial.

**GENERAL:**

**Problem:** There is no one at City Hall who can help push a project through the process.  
**Solution:** Create an Ombudsman through the Economic Development Department that can serve as a facilitator on larger projects.

## Appendix B. Improving Customer Expectations

Official Website of the City of San Antonio

CITY OF SAN ANTONIO  
Development Services Department

WHAT DO YOU WANT TO BUILD TODAY?

Home About DSD Business Online Services Resources Contact Us SanAntonio.gov

CONTACT US

**Main Office**  
[Office Hours](#)  
[Staff Telephone/Email](#)  
[Need Directions?](#)  
[About DSD](#)

Join Our Mailing List!

**Services**  
[Director's Office](#)  
[Divisions](#)

**Affiliated City Departments**  
[City Service Centers](#)  
[Planning & Community Development](#)  
[Historic](#)  
[Fire Marshal's Office](#)  
[Economic Development](#)  
[Public Works Storm Water](#)

**External Links**  
[Bexar Appraisal](#)  
[Bexar Met Water](#)  
[Bexar County Land Data](#)  
[SAWS](#)

Business Area	Total Customers in Queue	Estimated Wait Time
Trade License	0	0
Trade Permits	0	0
Residential Building Permits	1	2
Commercial Building Application	0	0
Certificate of Occupancy	0	0
Garage Sale	0	0
Zoning Consultation	0	0
Commercial Project Consultation	0	0
Small Business Consultation	0	0
Code Enforcement	0	0
C of O Pickup/DBA/TABC App	2	2
Other Services	0	0

Refresh Wait Times

(NEW) Inspection Scheduler

ONLINE Permits & Inspections

ONLINE Code Service Request

Lunchtime Training

SABCA

Development Process Manual

CUSTOMER SURVEY

NO GRAFT SA

TRAINING VIDEOS

The City of San Antonio maintains a live feed of customer wait times by request on their website.

In an effort to educate customers and resolve issues before they arise, the City of San Antonio maintains a Top 10 List of developer delays as they relate to various topics in plan review. This assists customers to be better prepared for their submittals and reduces common comments and discrepancies on plans.



## Developer Delays - Top 10 Plan Review Discrepancies

### BUILDING (Residential)

- Subdivision plat not approved or recorded at plan submittal
- Legal description and plans not matching
- Incomplete set of plans, documents missing
- Wrong foundation/site plan submitted
- Lot does not meet minimum lot size
- Plans not in compliance for zoning regulations
- Building setbacks not maintained
- Application indicates septic tank, requiring approval from Bexar County
- Site plans missing easement indications, or construction over easements
- Energy report incomplete

### BUILDING (Commercial)

- Lack of a recorded plat
- Incomplete site plan, no recognized platted lot with all easements, lot dimensions, multiple buildings need multi-bldg form, etc.
- Incomplete application; missing documents such as asbestos surveys
- Lack of general design compliance; such as showing windows where the code prohibits them
- Incomplete project details such missing plan sheets enumerated in the index or referenced within the plan set
- Life-safety design compliance issues, such as lack of stairs, exit elements
- The required exterior wall protection is not met
- The fire wall system does not meet the structural separation requirements
- Information provided on the building envelope energy report does not coordinate with the plans
- The provided assemblies do not meet the required fire-resistive rating based on the proposed/required type of construction

### ELECTRICAL (Commercial)

- Plans submitted with no information
- Plans not sealed by engineer when required by state law or local ordinance
- Disconnecting means for HVAC equipment does not comply
- Lighting compliance certificate missing, not signed, or plans do not match and lighting is not in compliance with the recommended IECC
- Multiple services to one building not in compliance with CPS standards
- Location of service and panels is not indicated or is in a noncompliant location
- Electrical equipment and feeders not in compliance with proposed load
- Grounding electrode system is not in compliance
- Load calculations/one line diagram of feeders and panel schedules are missing or incorrect
- Insufficient information regarding emergency systems to include fire pumps

### TRAFFIC (Commercial)

- Site does not meet minimum parking required
- Submit a site plan to scale showing existing and proposed improvements for the entire site
- Clarify the uses and areas (square feet, gross floor area) for the existing buildings on site
- A minimum
- foot throat is required, delete parking spaces as required
- Only one approach is allowed along A Rd.
- A minimum foot corner clearance is required, relocate proposed approach as required
- TIA is currently under review, fee pending
- Submit a plan and profile to determine curb feasibility and placement
- Sidewalks and approaches shall be reconstructed to current City and TAS specifications
- Engineer/Architect shall address all redline comments/stamps prior to next submittal

### DRAINAGE (Commercial)

- Drainage information currently under review by Platting – Land Development/Drainage information currently under Storm Water Engineering- Public Works to determine if Fee-In-Lieu-Of Detention is acceptable or if Detention is required
- Provide Water Surface Elevations, cross-sections for Detention Pond/outfall structures
- Provide Q and velocity calculations and depth for flow discharging through saw tooth curb/sidewalk box drains/approaches
- Show flow path taken to derive Time of Concentration (Tc) and justify the existing and proposed Tc.
- Minimum pipe size in a Drainage Easement/ROW does not meet requirement of 24 inches
- No structures/retaining walls shall be erected within the Drainage Easement. Engineered prints required for retaining walls greater than three feet.
- Submit a site grading plan illustrating existing/proposed contours based off a USGS benchmark
- For proposed CMP/HDPE pipe in Drainage ROW/Easement, submit a warranty letter from the Manufacturer's Engineer asserting the pipe will have a minimum life expectancy of 50 years
- An original Storm Water Management Participation Form with original signatures shall be submitted
- Site resides in the
- 0-year Flood Plain and a Development Permit may be required

## Appendix C. Interpretations and Bulletins

The City of Vancouver, Canada proactively communicates with its customer base to ensure that they are apprised of the most recent information and interpretations regarding the regulations governing development. Bulletins and interpretations are posted on their website [<http://former.vancouver.ca/commsvcs/LICANDINSP/bulletins/index.htm>] and indexed by topic for easy navigation. Examples are provided below. An example from San Antonio is also included on the next page.



COMMUNITY SERVICES  
Licences and Inspections

BULLETIN 2014-03-BU

April 8, 2014

### POWER-ACTUATED FASTENERS AND DROP-IN ANCHORS FOR ANCHORAGE AND SEISMIC RESTRAINT

Vancouver's Building By-Law (VBBL) Clause 4.1.8.17.(8)(d) prohibits the use of power-actuated fasteners and drop-in anchors to be used to support elements of structures and non-structural components and equipment described in Table 4.1.8.17.

It has been brought to our attention that industry is unclear about which anchors are permitted to be used for anchorage and seismic restraint. The BC Building Code Interpretation Committee has provided an interpretation stating that power-actuated fasteners and drop-in anchors are not permitted to be used for seismic tensile loading (see link below). It is our understanding that a code change request has been sent to NRC to further clarify this matter and also that APEGBC will be issuing a bulletin to its members in the future.

Until more clarification is provided, drop-in anchors and power-actuated connections in concrete are not considered to be acceptable for anchorage and seismic restraint. Registered professionals who sign the schedule B-2 for structural capacity including anchorage and seismic restraint (all disciplines) and contractors must ensure that the proper fasteners and anchors are being used and that they comply with Part 4 of the VBBL. These anchors and fasteners shall be inspected, tested, and listed (e.g. sprinkler) where required.

If you have any questions, please contact the Building Policy Branch at [cbo@vancouver.ca](mailto:cbo@vancouver.ca).

BCBC Interpretation Committee Link:

<http://www.boabc.org/assets/Codes-and-Regs/201403191335.pdf>

(Sgd.) P. Ryan, P.Eng.  
DEPUTY CHIEF BUILDING OFFICIAL, AND  
ASSISTANT DIRECTOR, BUILDING,  
PLANNING AND DEVELOPMENT SERVICES

(Sgd.) J. Watt, P.Eng., CP  
BUILDING POLICY ENGINEER  
BUILDING POLICY BRANCH

DOC/2014/106733

City Hall 453 West 12th Avenue Vancouver BC V5Y 1V4  
[vancouver.ca](http://vancouver.ca)

# BC BUILDING CODE INTERPRETATION COMMITTEE

A joint committee with members representing  
**AIBC, APEGBC, BOABC, POABC**

**File No: 12-0020**

**INTERPRETATION**

**Page 1 of 1**

Interpretation Date:	March 18, 2014
Building Code Edition:	BC Building Code 2012
Subject:	Drop-in Anchors
Keywords:	Power-actuated fasteners, drop-in anchors
Building Code Reference(s):	4.1.8.18.(1), 4.1.8.18.(2), 4.1.8.18.(8)(d)

**Question:**

Can power-actuated fasteners or drop-in anchors be used to support elements and components of buildings listed Table 4.1.8.18. for seismic tensile loading?

**Interpretation: No.**

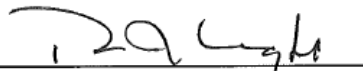
Sentence 4.1.8.18.(8) requires connections to the structure of elements and components listed in Table 4.1.8.18. be designed to support the component or element for gravity loads, to accommodate building deflections and the element or component deflections, and shall be designed for lateral force,  $V_p$ , as described in Sentence 4.1.8.18.(1).

Clause 4.1.8.18.(8)(d) states that power-actuated fasteners and drop-in anchors shall not be used for tension loads.

The NBC 2010 Structural Commentaries explained that "power-actuated connections, such as nails and bolts in concrete and shallow drop-in-type anchors, shall not be used for tension loading. This restriction is placed on these types of connections because of their inability to withstand the cyclic tensile loading imposed by seismic response."

Sentence 4.1.8.18.(2) exempts Categories 6 through 21 of Table 4.1.8.18. from having to be designed for lateral force,  $V_p$ , for buildings in low seismic area, other than post-disaster buildings, where  $I_E F_a S_a(0.2)$  is less than 0.35.

It is interpreted that power-actuated fasteners and drop-in anchors cannot be used in post-disaster buildings and buildings where  $I_E F_a S_a(0.2) \geq 0.35$  if they are subject to cyclic tensile loading imposed by seismic response.



R. J. Light, Committee Chair

The views expressed are the consensus of the joint committee with members representing AIBC, APEGBC, BOABC, and POABC, which form the BC Building Code Interpretation Committee. The purpose of the committee is to encourage uniform province wide interpretation of the BC Building Code. These views should not be considered as the official interpretation of legislated requirements based on the BC Building Code, as final responsibility for an interpretation rests with the local *Authority Having Jurisdiction*. The views of the joint committee should not be construed as legal advice.

1107875 / 2014-03-17



**CITY OF SAN ANTONIO**  
**Planning and Development Services Department**  
**MEMORANDUM**

**TO:** PDS Associates  
**FROM:** Roderick Sanchez, AICP, CBO - Building Official  
**DATE:** August 27, 2010  
**FILE:** Code Interpretation Manual

---

**INTERPRETATION NUMBER:** CI2010-015

**TITLE:** Home Occupancies and Residential portions of Live Work Units

**CODE EDITION:** Chapter 10 of the City Code  
2009 *International Building Code* (IBC)  
*Unified Development Code* (UDC)  
2008 *National Electric Code* (NEC)

**SECTION:** 10-1403.3 (1) - (Chapter 10)  
Section 419 (IBC)  
Section 35-378 and 35-381 (UDC)  
Section 334.10 (1) and (2) (NEC)

**PURPOSE:** To clarify when an existing residential structure will need to have the electrical system re-wired in a commercial wiring method when the structure is used for a home occupancy, and to clarify when the electrical system is required to be in commercial wiring method within the residential portion of a live-work unit.

**QUESTION:** Is it a requirement to convert the existing electrical wiring to commercial approved wiring method when applying to use an existing residence for a Home Occupancy?

**ANSWER:** No, although there is code language that addresses having all commercial installations wired in a commercial wiring method in Chapter 10, a Home Occupancy is not a commercial application under the UDC. Home Occupancies do not require a certificate of occupancy and the property remains residential. Information Bulletin 106 is still valid for Home Occupancies.

**QUESTION:** Is it a requirement to convert the existing residential electrical wiring to a commercial wiring method in the residential portion of a Live Work Unit?

**ANSWER:** No, as long as the structure meets 334.10 (1) and (2) of the 2008 NEC (built as a one and two family dwellings and/or is Type III, IV or V construction) and meets the definition and the requirements of a Live Work Unit in Section 419 of the 2009 IBC, then NM and SE cabling may be allowed to remain in the residential portion of the Live Work Unit. However the non-residential portion would be required to comply with a commercial wiring method. If the existing service entrance were located in the non-residential portion, the SE cabling would require sleeving in the non-residential area to extend it to the residential area.

**QUESTION:** In a proposed new structure that is intended to be a Live Work Unit, is the electrical system of the residential portion of the unit required to be designed and built per commercial standards?

**ANSWER:** No, if the new structure meets 334.10 (2) of the 2008 NEC which allows NM, NMC, and NMS cabling in Type III, IV and V construction, the entire structure is 3 stories or less above grade as per 10-1403.1 (21), and the structure meets the definition and the requirements of a Live Work Unit in Section 419 of the 2009 IBC, then NM cabling may be used in the residential portion of the Live Work Unit. However the non-residential portion would be required to comply with commercial wiring methods of the City Code Section 10-1403.3 (1).



Roderick J. Sanchez, AICP, CBO  
Director and Building Official  
Planning and Development Services Department



