

## LUMO Rewrite Project Plan - Roles & Engagement for Internal Stakeholders

### Project Planning Phase

	<b>Roles &amp; Responsibilities</b>	<b>Engagement</b>
<b>Council</b>	<ul style="list-style-type: none"> <li>Define Roles &amp; Responsibilities for the LUMO Rewrite process</li> <li>Initial goal discussions for the LUMO Rewrite</li> <li>Endorse Project Plan/Process</li> </ul>	Facilitated conversations regarding: <ul style="list-style-type: none"> <li>Defining roles &amp; responsibilities for the LUMO Rewrite process</li> <li>What works &amp; doesn't work with the LUMO</li> <li>What makes a good LUMO?</li> <li>Types of Unified Development Ordinances-pros &amp; cons</li> </ul>
<b>Dev. Review Boards<sup>1</sup></b>	Contribute to conversations about the LUMO Rewrite process	Staff attendance at Development Review Board/Commission meetings to: <ul style="list-style-type: none"> <li>Educate about zoning, etc.</li> <li>Inform about LUMO Rewrite process</li> </ul>
<b>Specialized Boards<sup>2</sup></b>	Contribute to conversations about the LUMO Rewrite process, as appropriate (Not all Specialized Boards may be consulted)	Staff attendance at Specialized Board/Commission meetings to: <ul style="list-style-type: none"> <li>Educate about zoning, etc.</li> <li>Inform about LUMO Rewrite process</li> </ul>
<b>Planning Commission</b>	Contribute to conversations about the LUMO Rewrite process	Staff attendance at Planning Commission meetings to: <ul style="list-style-type: none"> <li>Educate about zoning, etc.</li> <li>Inform about LUMO Rewrite process</li> </ul>
<b>Town Staff<sup>3</sup></b>	<ul style="list-style-type: none"> <li>Develop Project process, Engagement &amp; Communication Plans</li> <li>Develop website</li> <li>Perform Technical Analysis</li> <li>Write RFP/RFQ</li> <li>Create &amp; implement education videos/speakers' series</li> <li>Facilitation at Council Meetings</li> <li>Attendance/facilitation at Development Review &amp; Specialized Board/Commission meetings as well as Planning Commission</li> <li>Select Project Consultant/Consultant Team</li> </ul>	<ul style="list-style-type: none"> <li>Team meetings</li> <li>Consultation of specialized staff</li> <li>Project Consultant Selection Committee</li> </ul>

## Phase I – Code Diagnostic & Visioning

	<b>Roles &amp; Responsibilities</b>	<b>Engagement</b>
<b>Council</b>	<p>Provides direction on policy issues</p> <ul style="list-style-type: none"> <li>• Focus Area Visions</li> <li>• Values &amp; Community Benefits</li> </ul>	<p>Facilitated conversations regarding:</p> <ul style="list-style-type: none"> <li>• Values &amp; Community Benefits</li> <li>• What works &amp; doesn't work with the LUMO</li> <li>• Charrette results</li> </ul>
<b>Dev. Review Boards<sup>1</sup></b>	<p>Contribute to Code Diagnostic</p>	<p>Staff attendance at Development Review Board/Commission meetings to:</p> <ul style="list-style-type: none"> <li>• Facilitate Code Diagnostic discussion</li> <li>• Inform of Rewrite Process &amp; upcoming Project meetings</li> </ul>
<b>Specialized Boards<sup>2</sup></b>	<p>Contribute to Code Diagnostic tailored to the charge of each board/commission</p>	<p>Staff attendance at Specialized Board/Commission meetings to:</p> <ul style="list-style-type: none"> <li>• Facilitate Code Diagnostic discussion</li> <li>• Inform of Rewrite Process &amp; upcoming Project meetings</li> </ul>
<b>Planning Commission</b>	<p>Contribute to Code Diagnostic</p>	<p>Staff attendance at Planning Commission meetings to:</p> <ul style="list-style-type: none"> <li>• Facilitate Code Diagnostic discussion</li> <li>• Inform of Rewrite Process &amp; upcoming Project meetings</li> </ul> <p>Participate in Stakeholder Interviews</p>
<b>Town Staff<sup>3</sup></b>	<ul style="list-style-type: none"> <li>• Facilitation at Council Meetings</li> <li>• Attendance/facilitation at Development Review &amp; Specialized Board/Commission meetings as well as Planning Commission</li> <li>• Organize &amp; staff charrettes, transect walks, stakeholder interviews/focus groups, office hours</li> <li>• Evaluation of Project deliverables &amp; Technical Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Team meetings</li> <li>• Consultation of specialized staff</li> <li>• Attendance at engagement events</li> </ul>

## Phase 2 – Council Endorsement

	<b>Roles &amp; Responsibilities</b>	<b>Engagement</b>
<b>Council</b>	<ul style="list-style-type: none"> <li>Reviews &amp; evaluates Code Diagnostic</li> <li>Reviews &amp; evaluates feedback from Planning Commission &amp; Dev. Review Boards</li> <li>Endorses/adopts Specific Plans for Focus Areas</li> <li>Endorses results of Value &amp; Community Benefit facilitation</li> <li>Appoints Technical Task Force</li> </ul>	<p>Work Sessions/CCES Meetings to review &amp; evaluate:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Results of Value &amp; Community Benefit facilitation</li> <li>Feedback from Planning Commission &amp; Dev. Review Boards</li> </ul> <p>Council meeting to:</p> <ul style="list-style-type: none"> <li>Endorse results of Value &amp; Community benefit facilitation</li> <li>Endorse or adopt Specific Plans &amp; to amend <i>Chapel Hill 2020</i> with Specific Plans, if appropriate</li> <li>Appoints &amp; empowers the Technical Task Force</li> </ul>
<b>Dev. Review Boards<sup>1</sup></b>	<p>Review &amp; Comment on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Specific Plans</li> <li>Results of Value &amp; Community Benefit facilitation</li> </ul>	<p>Staff attendance at Development Review Board/Commission meetings to review &amp; take comments on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Specific Plans</li> <li>Results of Value &amp; Community Benefit facilitation</li> </ul>
<b>Specialized Boards<sup>2</sup></b>	<p>Review &amp; Comment on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Results of Value &amp; Community Benefit facilitation, if appropriate for the board's charge</li> </ul>	<p>Staff attendance at Specialized Board/Commission meetings to review &amp; take comments on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Results of Value &amp; Community Benefit facilitation, if appropriate</li> </ul>
<b>Planning Commission</b>	<p>Review &amp; Comment on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Specific Plans</li> <li>Results of Value &amp; Community Benefit facilitation</li> </ul> <p>If Specific Plans are to be incorporated into <i>Chapel Hill 2020</i>, provide recommendation to Council</p>	<p>Staff attendance at meetings to facilitate discussions &amp; take comments on:</p> <ul style="list-style-type: none"> <li>Code Diagnostic</li> <li>Specific Plans</li> <li>Results of Value &amp; Community Benefit facilitation</li> </ul>
<b>Town Staff<sup>3</sup></b>	<ul style="list-style-type: none"> <li>Facilitation at Council Meetings</li> <li>Attendance/facilitation at Development Review &amp; Specialized Board/Commission meetings as well as Planning Commission</li> </ul>	<ul style="list-style-type: none"> <li>Team meetings</li> <li>Consultation of specialized staff</li> </ul>

### Phase 3 – Code Rewrite & Zoning Atlas Alignment

	<b>Roles &amp; Responsibilities</b>	<b>Engagement</b>
<b>Council</b>	<ul style="list-style-type: none"> <li>Monitors work of the Technical Task Force</li> <li>Redirects policy direction of rewrite, if necessary</li> <li>Evaluate Technical Analysis</li> <li>Evaluates DRAFT UDO</li> </ul>	<ul style="list-style-type: none"> <li>Receives quarterly updates from staff at Work Sessions/CCES meetings</li> <li>Work Sessions/CCES meetings for in-depth review of particular areas of concern, as necessary</li> <li>Receives agenda, minutes &amp; meeting notes for Technical Task Force</li> <li>Extended Work Sessions (2) to review &amp; consider DRAFT UDO &amp; Zoning Atlas</li> </ul>
<b>Dev. Review Boards<sup>1</sup></b>	Review & Comment on: <ul style="list-style-type: none"> <li>“Blueprint” of Proposed LUMO changes</li> <li>Draft LUMO chapters</li> <li>Reports of Technical Analyzes</li> <li>DRAFT UDO</li> </ul>	<ul style="list-style-type: none"> <li>Staff attendance at Development Review Board/Commission meetings 1 time per quarter to review &amp; take comments on deliverables &amp; to provide project updates</li> <li>Written updates provided to Boards/Commissions monthly or as appropriate</li> <li>Staff/Consultant attendance at Joint Development Review Board Meeting to introduce DRAFT UDO</li> <li>Staff attendance at Development Review Board/Commission meetings to take comments on DRAFT UDO</li> </ul> (Comments on deliverables funneled to Technical Task Force for consideration)
<b>Specialized Boards<sup>2</sup></b>	Review & Comment, as appropriate for the Board’s charge: <ul style="list-style-type: none"> <li>“Blueprint” of Proposed LUMO changes</li> <li>Draft LUMO chapters</li> <li>DRAFT UDO</li> </ul>	<ul style="list-style-type: none"> <li>Staff attendance at Specialized Review Board/Commission meetings 1 time per quarter to review &amp; take comments on deliverables &amp; to provide project updates</li> <li>Written updates provided to Boards/Commissions monthly or as appropriate</li> <li>Staff/Consultant attendance at Joint Development Review/Specialized Board Meeting to introduce DRAFT UDO</li> <li>Staff attendance at Specialized Board/Commission meetings to take comments on DRAFT UDO</li> </ul> (Comments on deliverables funneled to Technical Task Force for consideration)
<b>Planning Commission</b>	Review & Comment on: <ul style="list-style-type: none"> <li>“Blueprint” of Proposed LUMO changes</li> <li>Draft LUMO chapters</li> <li>Reports of Technical Analyzes</li> <li>DRAFT UDO</li> </ul>	Staff attendance at meetings 1 time per month (or more often as needed) to discuss following deliverables & give project updates: <ul style="list-style-type: none"> <li>“Blueprint” of Proposed LUMO changes</li> <li>Draft LUMO chapters</li> <li>Reports of Technical Analyzes</li> <li>DRAFT UDO</li> </ul> (Comments on deliverables funneled to Technical Task Force for consideration)
<b>Technical Task Force</b>	<ul style="list-style-type: none"> <li>Evaluate ALL deliverables to insure implementation of Council policy direction</li> <li>Evaluate all input (community, Planning Commission, Development Review Boards) on deliverables</li> <li>Provide direction to staff &amp; consultant on deliverables</li> </ul>	Biweekly or monthly meetings with staff (& consultant as appropriate)

<p style="text-align: center;"><b>Town Staff<sup>3</sup></b></p>	<ul style="list-style-type: none"> <li>• Organize &amp; staff engagement events including office hours</li> <li>• Create &amp; monitor online engagement</li> <li>• Evaluation of Project deliverables &amp; Technical Analysis</li> <li>• Staff Technical Task Force</li> <li>• Facilitation/Updates at Council Meetings</li> <li>• Attendance/facilitation at Development Review &amp; Specialized Board/Commission meetings as well as Planning Commission</li> </ul>	<ul style="list-style-type: none"> <li>• Team meetings</li> <li>• Consultation of specialized staff</li> </ul>
--	--	--

## Phase 4 – Code/Atlas Adoption

	<b>Roles &amp; Responsibilities</b>	<b>Engagement</b>
<b>Council</b>	<ul style="list-style-type: none"> <li>Evaluates DRAFT Code suitable for adoption &amp; Zoning Atlas</li> <li>Holds required public hearings</li> <li>Adopts new UDO/Zoning Atlas</li> </ul>	<ul style="list-style-type: none"> <li>Extended Work Session to review DRAFT Code suitable for adoption &amp; Zoning Atlas (May require multiple Work Sessions)</li> <li>Public hearing(s)</li> <li>Adoption at Council Business Meeting</li> </ul>
<b>Dev. Review Boards<sup>1</sup></b>	Review & Comment on DRAFT UDO suitable for adoption	Staff attendance at Development Review Board/Commission meetings to review & take comments on Draft UDO suitable for adoption & to provide updates on adoption schedule  (Comments funneled to Technical Task Force for consideration)
<b>Specialized Boards<sup>2</sup></b>	Review & Comment on DRAFT UDO suitable for adoption, as appropriate for the Board’s charge	Staff attendance at Specialized Board/Commission meetings to review & take comments on Draft UDO suitable for adoption & to provide updates on adoption schedule  (Comments funneled to Technical Task Force for consideration)
<b>Planning Commission</b>	<ul style="list-style-type: none"> <li>Review &amp; Comment on DRAFT UDO suitable for adoption</li> <li>Provide recommendation to Council on final DRAFT UDO suitable for adoption</li> </ul>	<ul style="list-style-type: none"> <li>Staff attendance at Planning Commission meetings (at least 3) to review &amp; take comments on DRAFT UDO suitable for adoption &amp; to provide updates on adoption schedule (Comments funneled to Technical Task Force for consideration)</li> <li>Consideration of recommendation on the Final DRAFT UDO suitable for adoption</li> </ul>
<b>Technical Task Force</b>	<ul style="list-style-type: none"> <li>Evaluate all input (community, Planning Commission, Development Review &amp; Specialized Boards) on DRAFT UDO suitable for adoption &amp; Zoning Atlas</li> <li>Recommend any revisions to DRAFT UDO suitable for adoption &amp; Zoning Atlas</li> </ul>	<ul style="list-style-type: none"> <li>Biweekly or monthly meetings with staff (&amp; consultant as appropriate)</li> <li>Conclude meetings after recommending revisions to DRAFT UDO suitable for adoption</li> </ul>
<b>Town Staff<sup>3</sup></b>	<ul style="list-style-type: none"> <li>Organize &amp; staff engagement opportunities</li> <li>Create &amp; monitor online engagement</li> <li>Evaluation of Project deliverables</li> <li>Facilitation at Council Meetings</li> <li>Attendance/facilitation at Development Review &amp; Specialized Board/Commission meetings as well as Planning Commission</li> <li>Train/update internal &amp; external stakeholders</li> <li>Ensure code codification</li> <li>Create/update online code resources</li> </ul>	<ul style="list-style-type: none"> <li>Team meetings</li> <li>Consultation of specialized staff</li> </ul>

**<sup>1</sup> Development Review Boards include:** Housing Advisory Board, Transportation and Connectivity Advisory Board, Environmental Sustainability Advisory Board, Community Design Commission

**<sup>2</sup> Specialized Boards include:** Historic District Commission; Stormwater Management Utility Advisory Board; Parks, Greenways, & Recreation Commission

**<sup>3</sup> Staff** includes the LUMO Project Manager, Project Team, Strategic Team & Specialized staff consulted for specific topic knowledge & expertise