

# Planning Systems Evaluation (PSE)

Advancing Complete Communities through  
Development Review in Chapel Hill

Planning Systems Evaluation  
Council Working Group Session  
THE KEESMAAT GROUP

January 18th, 2023

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COMPLETE  
COMMUNITIES  
STRATEGY

# Laying the foundations: what we know

1. Development review is **not** delivering desired outcomes.
2. Current processes are the primary **disincentive** to investment in Chapel Hill.
3. **Efficiencies are required** to streamline processes and mitigate confusing iterations.
4. **Role clarification is required.**
5. An unclear process creates **an emotional toll** for everyone involved.
6. The **time is right for change**: a key success factor for change is having a clear vision. The Complete Community Framework provides critical guidance.

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# The opportunity – what we heard

## 1. Eliminate Duplication

- i. Decisions are revisited by multiple parties
- ii. Expectations are not clear
- iii. Review is 'siloed'
- iv. Adjacent municipalities have better processes that are precedents (Asherville, Raleigh)

## 2. Better use staff expertise

- i. Staff are underutilized: facilitators vs experts
- ii. Generate responsibility for recommendations by defining their role more in keeping with professional expectations
- iii. Add clarity to where decisions are being made

## 3. Acknowledgement that there is no 'silver bullet'

- i. And yet the aspiration to do better exists
- ii. Find the low-hanging fruit: begin with process changes
- iii. Concern that even if 'processes' are fixed, people will still behave the same

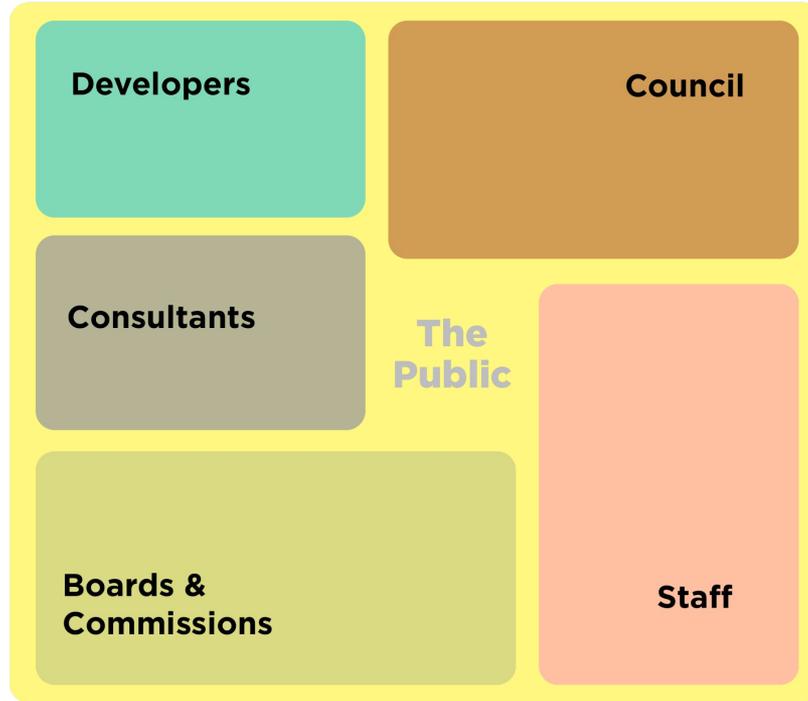
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# Project Principles

| PROJECT PRINCIPLES                            | Implications  |
|---|---|
| Build on existing work-to-date                | Review and consider the new expedited review process for affordable housing |
| Collect diverse perspectives and inputs       | Council, staff, developers, boards, consultants, public                     |
| Maintain momentum                             | Manage the PSE to key dates with clear outcomes                             |
| Build trust in Council's commitment to change | Implement a trial alternative review mechanism                              |
| Deliver tangible outcomes                     | Propose a revised development review process                                |
| Ensure deliverability                         | Work closely with Planning Staff to ensure alignment                        |

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# Key Inputs



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*Key Inputs of the Planning Systems Evaluation*

# Objectives

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## Planning Systems Evaluation Objectives

1. Re-establish planning culture expectations
2. Ensure future outcomes align with the vision of Chapel Hill
3. Focus on successful implementation
4. Align work underway with Complete Communities Strategy objectives
5. Position development for to deliver on city building outcomes versus a culture of regulation
6. Assess the Role of Boards and Commissions to find efficiencies
7. Create developer participation in the review to build confidence/trust
8. Assess/use information that Orion has collected to date

# How will change take place?

1. **Alignment with a vision is new:** Complete Community Framework sets the stage for process change.
2. **Culture change requires clear roles:** But people need to work within the bounds of their role.
3. **New Processes are a tool:** They will not deliver the outcome. People will.

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# In and Out of Scope

| In Scope  | Out of Scope (follows approval)  |
|---|----------------------------------|
| Evaluate Development Review                                   | Implement changes in the process |
| Assess Roles in the Review Process                            | Monitor implementation           |
| Review Role of Boards and Commissions                         | Build consensus on these roles   |
| Recommend a revised process to Council based on due diligence | Revise internal processes        |
| Understanding the level of detail in the LUMO                 | Rewriting the LUMO               |
| A summary deck of recommendations that is usable to staff     | A traditional report             |
| Re-establish planning culture expectations                    | Changing the culture             |

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# Critical Questions to be explored

| # | Question   | Focus  |
|---|--|--|
| 1 | How can we reduce the time it takes to approve new developments? | Consolidating processes                          |
| 2 | How can we deliver better outcomes?                              | Understanding what is working today, what is not |
| 3 | How can we ensure Boards and Commissions are appropriately used? | Ensuring clear roles                             |
| 4 | How should Council best participate in the review process?       | Ensuring appropriate roles                       |
| 5 | What Planning Systems will best deliver a complete community?    | Aligning Planning Systems with desired outcomes  |

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# The Checklist

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# Checklist Goals

## Goal One

To incentivize Applicants to evaluate their own proposals based on Complete Community Objectives.

## Goal Two

To reward Applicants who achieve high levels of conformity with the Complete Community Framework, as determined through the Checklist process. Resembles as-of-right.

## Goal Three

To equip Staff with a clear mechanism for evaluating, discussing and refining Applications in a collaborative manner, with Applicants.

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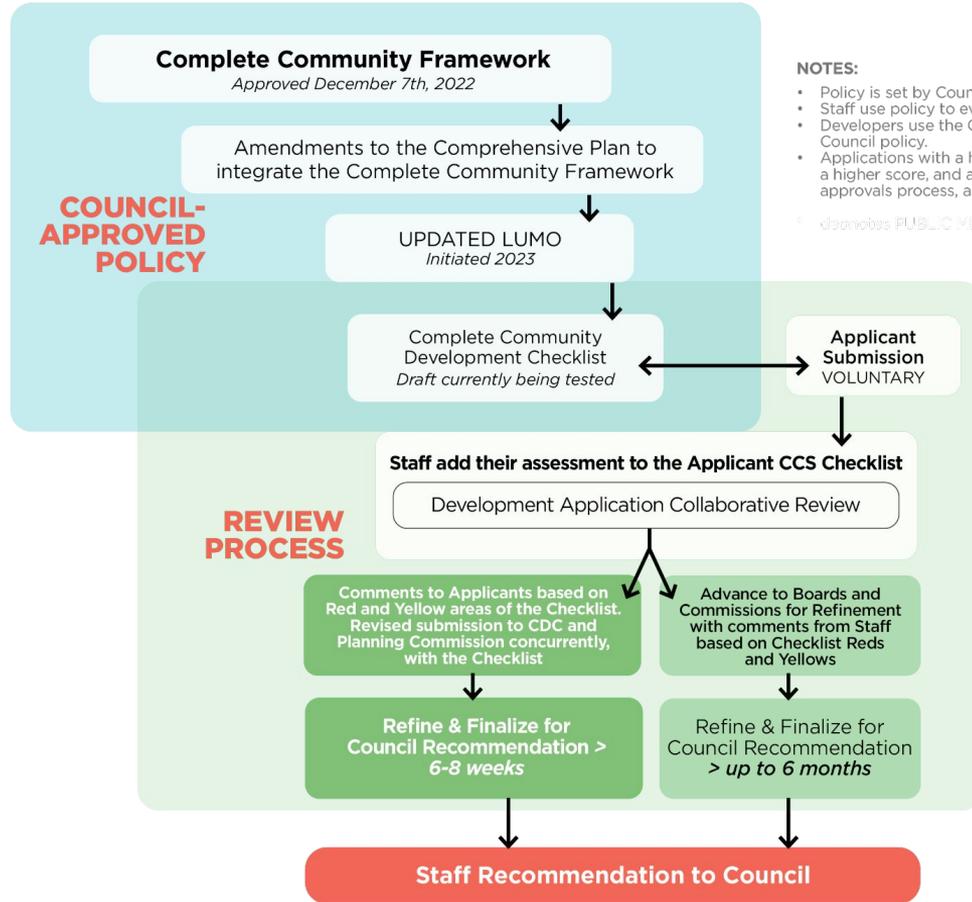
# The Checklist is a tool.

1. **It builds on the Complete Community Framework**, and is a mechanism for executing that framework.
2. It sits with a revised overall development review process as captured in the **PSE Expedited Process graphic**.
3. It is intended to assist in delivery of outcomes consistent with regulatory frameworks: both the Comprehensive Plan and the LUMO (both to be updated).
4. It will lead to a **shorten review process** – applicants now have clarity as to the measures being used to evaluate their application.
5. It puts **greater emphasis on the role of Staff** in administering the policies of Council. This move closer to an as-of-right approach.
6. Like any tool it does not deliver an outcome – **the people using it do**.

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# Planning Systems Consolidated and Expedited Approach Town of Chapel Hill

Last updated: Jan. 12, 2023



**COUNCIL-APPROVED POLICY**

**REVIEW PROCESS**

**NOTES:**

- Policy is set by Council.
- Staff use policy to evaluate development applications.
- Developers use the Checklist to ensure conformity with Council policy.
- Applications with a higher level of conformity receive a higher score, and advance through an expedited approvals process, as led by Staff.

☞ denotes PUBLIC MEETING

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**DEVELOPMENT REVIEW BOARDS -**  
*These boards have a role in the formal review of a development application:*

- Planning Commission
- Community Design Commission
- Housing Advisory Board
- Transportation and Connectivity Advisory Board
- Environmental Stewardship Advisory Board
- Historic District Commission (within HDC boundary)

**OTHER BOARDS -**

- Stormwater Management Utility Advisory Board - by policy, reviews Concept Plans for projects larger than 5 acres or impacts within a stream buffer

| Subject Area           | Expectation  | N/A  | Red | Yellow | Green |  |
|------------------------|--|--|-----|--------|-------|--|
| 1. Development Program | a. Compliant with Future Land Use Map  |  |     |        |       |  |
|                        | b. Compliant with Comprehensive Plan   |  |     |        |       |  |
|                        | c. Developer experience  |  |     |        |       |  |
|                        | d. Neighborhood Amenities  |  |     |        |       |  |
|                        | e. Appeal to or accommodation of all ages  |  |     |        |       |  |
|                        | f. Relationship to neighborhood context  | i. Opportunities for synergies<br>ii. Adjacencies (at edges, what uses abut?)                          |     |        |       |  |
|                        | Advance to B/G or to Staff?  |  |     |        |       |  |
| 2. Location            | a. Within Focus Area   |  |     |        |       |  |
|                        | b. Proximity to neighborhood community facilities (schools, day care, community center, and recreation facilities/parks) (Red = >2 mi.; Yellow = 1-2 mi.; Green <1 mi) |  |     |        |       |  |
|                        | c. Proximity to other neighborhood centers (commercial, employment)  |  |     |        |       |  |
|                        | d. Proximity to greenways  |  |     |        |       |  |
|                        | e. Walk Score metric   |  |     |        |       |  |
|                        | Advance to B/G or to Staff?  |  |     |        |       |  |
| 3. Revenue             | a. Tax efficiency  |  |     |        |       |  |
|                        | b. Job Creation  |  |     |        |       |  |
|                        | c. Sales Tax Generator   |  |     |        |       |  |
|                        | Overall score  |  |     |        |       |  |
| 4. Design              | a. Site placement, design, and building disposition  | i. Buildings front or create engaging street edges with no parking located between building and street |     |        |       |  |
|                        |  | ii. Provision of open spaces in a purposeful and composed manner, no "left over" spaces                |     |        |       |  |
|                        |  | iii. Create scale, break down large masses into smaller related sub-components                         |     |        |       |  |

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# How does the Checklist promote culture change?

Establishes Roles and responsibilities

## **Council**

- Sets Policy
- Decision-maker

## **Developers**

- Collaborates with staff
- Refines based on feedback

## **Staff**

- Delegated to lead review & assess
- Makes recommendation to council

## **Boards and Commissions**

- Comments based on conformity to Council Policy
- Mostly Advisory

Makes these roles clear and public

All parties will require guidance and accountability to ensure conformance to roles.

Council meetings, and Boards and Commissions, should be governed by Robert's Rules. Chairs, upon appointment, should be trained to implement the rules to ensure the body does not stray from its role.

Provides incentives to follow roles

## **Council**

- Stated objective of 'getting out of the weeds'
- Provide a more respectful work environment for existing staff
- Attract and retain qualified staff

## **Developers**

- Shorter process, better outcomes

## **Staff**

- Use & development of expertise
- Meaningful work; shape outcomes

## **Boards & Commissions**

- Meaningfully contribute expertise

# How does the Checklist promote culture change?

**Council:** incentivized to focus on policy, and to empower staff to implement policy on their behalf

**Developers:** incentivized to work collaboratively with staff

**Staff:** incentivized to work collaboratively with developers

**Boards and Commissions:** incentivized to comment on their area of expertise

**Public:** incentivized to engage in appropriate public meetings

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