



Site Plan Review Process Strategies for Improvement

Executive Summary

Problem Statement:

Mecklenburg County, North Carolina Department of Transportation (NCDOT) and the Towns jointly review land development plans within the planning jurisdictions of the six Towns. With the recovery of the economy, land development activity has increased significantly. Recent staff turnover in some of the Towns and the increase of one Mecklenburg County plan reviewer position in FY15 to three reviewers at the end of FY16 make it the perfect time to look for opportunities to improve the plan review processes by implementing changes in the short term. The goals of these changes are to improve customer service and manage the land development plan review processes more efficiently.

Approach:

With the support of the Town Managers, a Site Plan Review Improvement Team was assembled. The Team members are as follows:

- Dave Canaan – Water & Land Resources, Division Director (Team Lead)
- Don Ceccarelli – Mecklenburg County, Permitting & Compliance
- Jason Burdette - Town of Davidson
- Wayne Herron – Town of Cornelius
- Jack Simoneau – Town of Huntersville
- John Hoard – Town of Mint Hill
- Mary Jo Gollnitz – Town of Matthews
- Travis Morgan – Town of Pineville
- Brett Canipe - NCDOT

Eight meetings were conducted by the Team and were structured around the three focus areas that would yield the most benefit to improving customer service and managing plan review processes more efficiently. The three focus areas include:

- Improving the predictability of how long it will take to successfully complete the plan review process
- Enhancing the communication among all agencies and the applicant

- Increasing flexibility of the agencies to support the applicant through a truncated review process.

The Team discussed numerous strategies as they worked through the three focus areas. After the strategies were drafted by the Team, they were shared with a group of customers (site engineers) for their input prior to being presented to the leadership for each agency. The customers consulted were:

- Skip Notte – Dewberry
- Jay Henson - Henson/Foley
- Matt Langston - Landworks Design Group

The site engineers provided valuable feedback and supported the proposed strategies.

Strategies to be Implemented:

The Focus Areas and corresponding Strategies are as follows:

I. Improve Predictability

- A. All agencies will strive to meet the following set of common goals:
 1. The average number of cycles for plans to be approved is 2.5 cycles.
 2. A pre-submittal meeting and checklist are not required for Revisions to Approved Plans unless the revisions are extensive (example: changes to the product of the proposed development).
 3. If project types that have a review cycle higher than the goal were reduced down to the goal, approximately 15% fewer plans would come through the plan review process.
 4. Final Plats will be reviewed in 14 calendar days or less.
 5. All other plans (including preliminary, concept, etc., but excluding Final Plats) will be reviewed in 21 calendar days or less.
 6. If a review exceeds the prescribed number of review days, the additional time used is reduced from the prescribed number of review days for the next cycle.

II. Enhance Communication

- A. The review agencies will clearly delineate plan review comments (those required to meet the minimum requirements vs. suggestions) related to State delegated programs.
- B. The County will start attending pre-submittal meetings again.
- C. The engineer will develop a table (block copying redline results from EPM) that lists all the agency comments and how the engineer addressed each comment.
- D. With assistance from the Towns, the County will conduct at least two educational forums annually on the plan review and permitting processes, EPM, etc. Feedback on improvements to plan review processes should be gathered at the forum also.
- E. An on-going Stakeholder's group will be formalized to gather feedback from engineers and surveyors that provide site design services specifically related to improving the plan review process over time.

III. Increase Flexibility

- A. Increase staff availability to address plan review comments and resolve or clarify issues over the phone or via email (dealing with all questions at one time and not relying on Town and County staff to design the project).
- B. Prior to resubmitting, a pre-resubmittal meeting will be conducted to go over how the engineer addressed the agencies comments that were made on the previous submittal.
- C. The agencies and the County will implement a formal process of allowing slip sheeting.
- D. As part of the project to replace the Electronic Plans Management (EPM) system sheet indexing and interactive review will be seriously considered to increase flexibility and reduce review cycles. This is a significant technology endeavor for all agencies and it may be 2016 or 2017 before the project is implemented.

Strategies Not Supported for Implementation:

The Team discussed several additional strategies but felt that the implementation of these strategies should not be considered in the near future. The strategies and the reasoning for not pursuing in the near term are as follows:

- Instead of developing a new process to offer scheduled reviews, the Team agreed that focusing on productive pre-submittal meetings (including setting up a process where the plans are distributed prior to the meeting) and starting pre-resubmittal meetings would be more effective.
- Having a pre-submittal meeting, post submittal meeting and a pre-resubmittal meeting(s) for a plan seemed excessive.
- The Team also agreed that all the new initiatives mentioned in this report should be implemented and closely monitored before consideration is given to charging additional fees if plan goes past a certain cycle.
- To help reduce review cycles, the elimination of the requirement for Concept Plan submittal was considered; however, the Site Plan Review Improvement Team agreed the Concept Plan requirement was valuable and should not be eliminated.

Timeline:

With the exception of potentially implementing sheet indexing and interactive review, the above will be implemented after the County has filled a vacant plan reviewer position. This is necessary because the County does not have the ability to implement the above strategies with one plan reviewer.