



The Juggling Act

Managing and Improving Development Processes

The Many Hats of Development Staff



Where the ordinance ends and business process begins...

- **Ordinance/ Code – defines the general process for each type of development application or permit**
- **Business process – the specific way your city accepts, processes, reviews, and approves development applications and permits**
 - **Clear well defined & written out procedures**
- **Train development staff in the business processes and ensure each person understands the purpose of the application/permit and where they can go if they have questions**



Diagnosics

- **When was the last time we updated the development codes?**
 - **When was the last time we updated our business processes?**
 - **What are the common complaints you receive from the development community?**
 - **On average how many permit applications go missing each year?**
 - **Can I clearly describe our processes to a new employee?**
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The Application Process

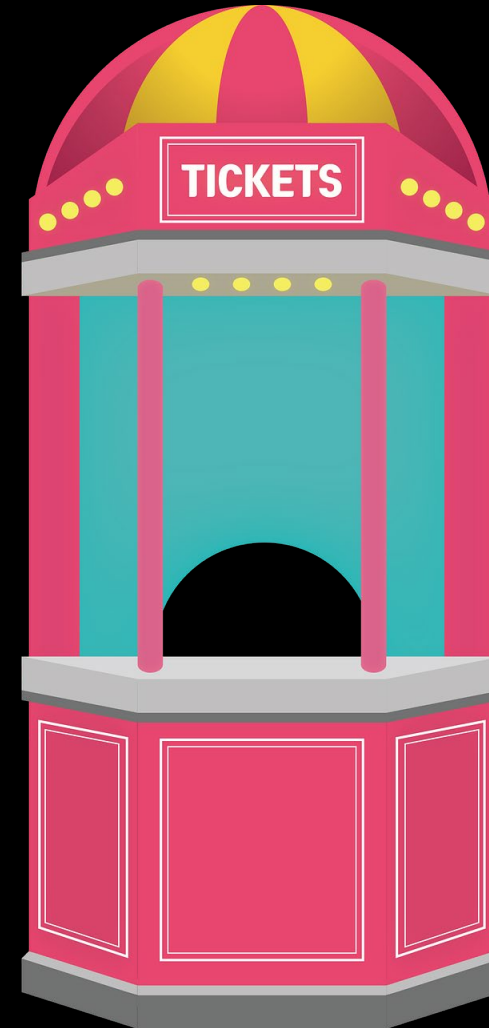
- Intake
 - Distribution
 - Tracking
 - Review & Comments
 - Approval & Issuance
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Application Process: Intake

- **Updated applications and checklists**
- **Completeness review**
- **Physical and/or Digital submittal**
- **Have a clear process for how digital files are stored and named**



Application Process: Distribution

- **Clear process for how plans are distributed for review and which reviews are required**
 - **Include internal review timelines**
- **Don't relay solely on physical distribution of plan and application materials**





Application Process: Tracking

- **Have you ever lost a planning or building permit application?**
- **Ensure you have a functioning system for tracking received applications/permits which can be accessed by other development staff members**
- **Recommended – digital tracking and organized in a way to collect various data fields**
 - **Microsoft Access, Microsoft Excel, Microsoft Planner**
 - **Regularly back up digital files**
- **Track plan review status**

Application Process: Review & Comments

- **#1 Go Digital**
 - **Popular digital review programs include Bluebeam Revu & Adobe Acrobat**
 - **Have multiple reviewers or different departments?**
 - **Best practice is to issue a single set of consolidated comments**
 - **Assign a staff point of contact to manage the project/permit**
 - **Staff Development Review meetings**
 - **Ensure that reviewers are trained and understand when various regulations are applicable**
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Application Process: Approval & Issuance

- **Have a process for tracking approval and sign-off**
- **Issue written notice of approval every application**
 - **Permits or form letters**

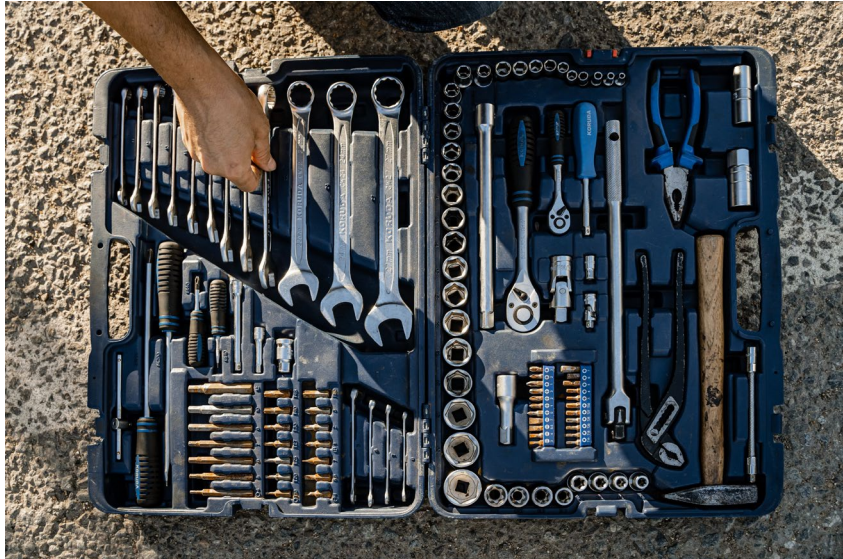




Do you know what tools you have in your Toolbox?



VS



“If the only tool you have is a hammer, you tend to see every problem as a nail.”

- Abraham Maslow



A Few Tools You Already Have

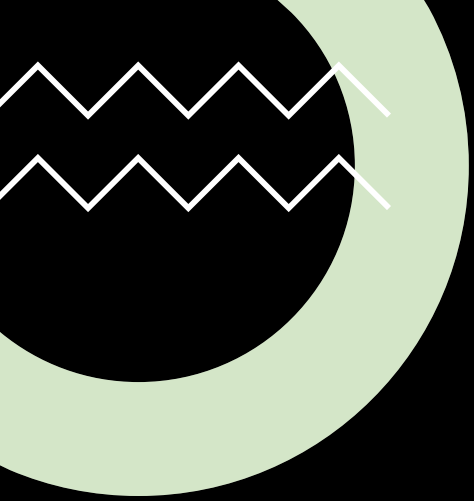
- **Your staff**
- **Your peers**
- **Audit your processes**
- **Office365**
 - **Teams**
 - **SharePoint**
 - **Planner**
- **Specialty software**
- **Consultants & 3rd Party Services**



Consultants

- **Utilize consultants and 3rd party services whenever you need**
 - **Pro Tip: structure your fee schedule to pass these costs on to the applicant**
- **Make sure it is clear what you expect and the scope of their authority**
- **Don't hesitate to ask questions**





Watch Out!

- **Old outdated processes and forms**
- **“This is the way it has always been done...” mentality**
- **Working in a silo**
- **Surges in development**



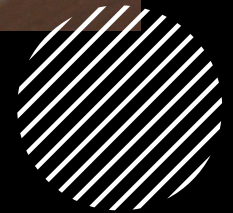


Tips for Success

- **Write it down, write everything down!**
- **Reevaluate your processes regularly**
- **Update processes for clarity, efficiency, and customer service**
- **Go digital**
- **Teamwork makes the dream work**

Where to Start...

- **Identify any existing processes that are missing or need improvement**
- **Stay organized and define the scope of your improvement effort**
- **Work on incremental improvement: 1 bite at a time**
- **Create a team to help with the update process**
- **Meet weekly or bi-weekly for 1 hour to discuss process improvements**





Quick & Easy Improvements

- **Website presence and information**
- **Create a development manual (applications & checklists)**
- **Cross train staff**



Development updates share challenges with dam building... the water never stops flowing!



**Don't get
overwhelmed!**

**Ask for
assistance...**



HERE
TO
HELP



Questions?

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