The Latimore Company, LLC

Predictable, Efficient and Collaborative

Community Land Use and Permit Processing

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Establishing a Streamlined Permit Review Cycle
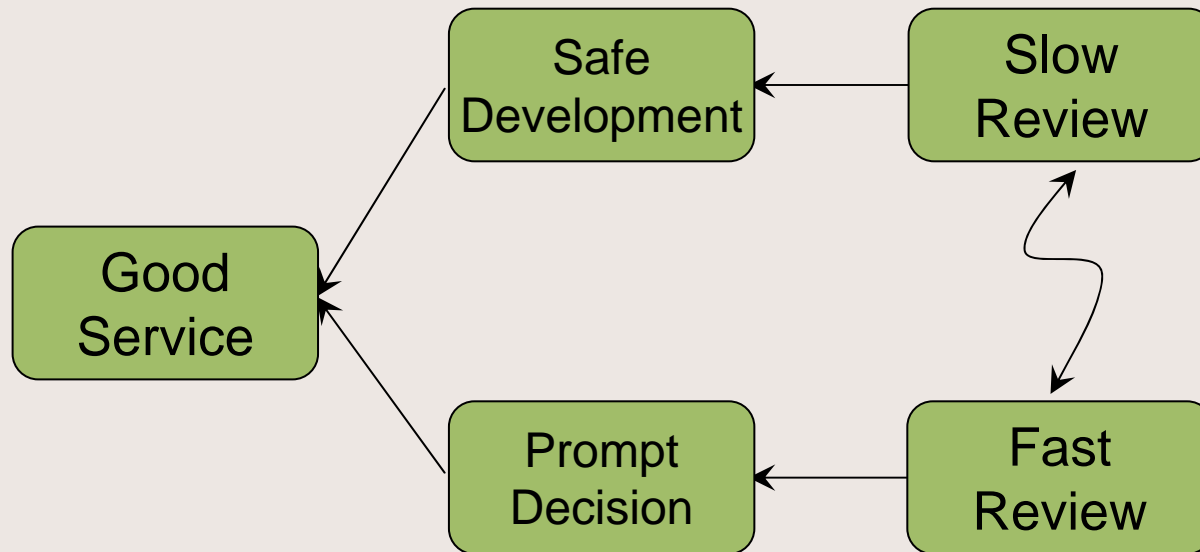
The Integrated Review Cycle

Kurt Latimore

APA National Conference

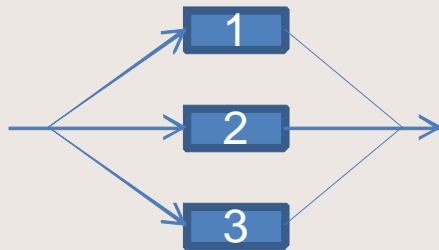Boston, Massachusetts

April 10, 2011

The Dilemma

```
  ┌──────────────┐        ┌──────────────┐
  │     Safe     │◄────── │     Slow     │
  │ Development  │        │    Review    │
  └──────────────┘        └──────────────┘
       ▲                          │
  ┌──────────────┐                │
  │     Good     │                │
  │   Service    │                ▼
  └──────────────┘        
       ▲                   
  ┌──────────────┐        ┌──────────────┐
  │    Prompt    │◄────── │     Fast     │
  │   Decision   │        │    Review    │
  └──────────────┘        └──────────────┘
```

- How do we provide thorough reviews <u>and</u> prompt decisions?
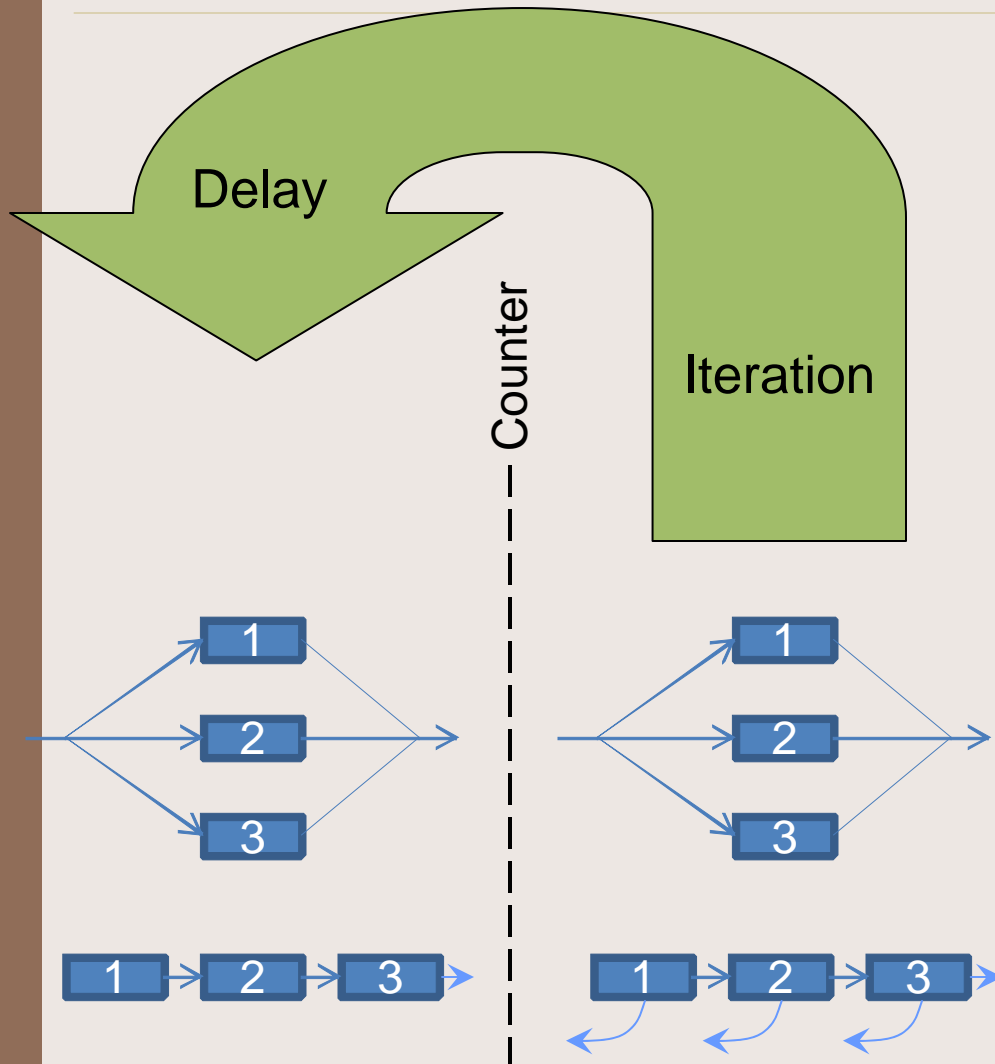
Thorough or Prompt?

Sequential

1 → 2 → 3

Parallel

1

2

3

- For more thorough reviews, we tend to add specialists in the various codes
- This adds time if the review is sequential
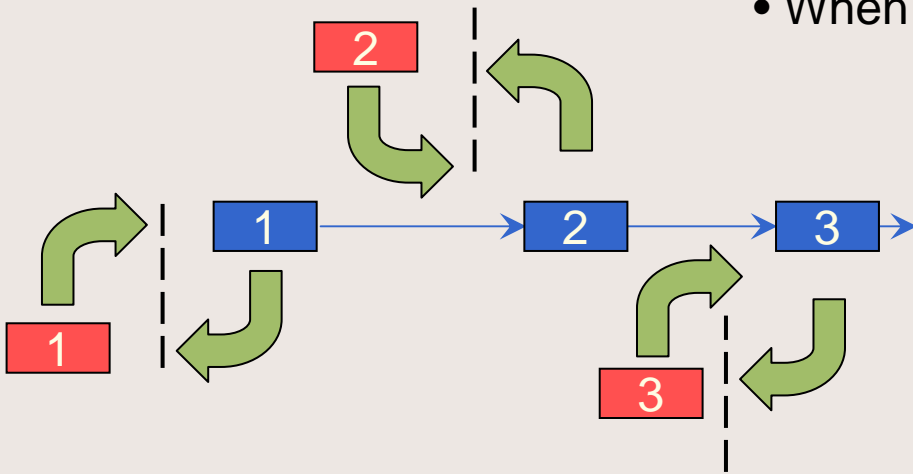- This adds complexity if the review is in parallel (concurrent)

The Plot Thickens

Delay

Counter

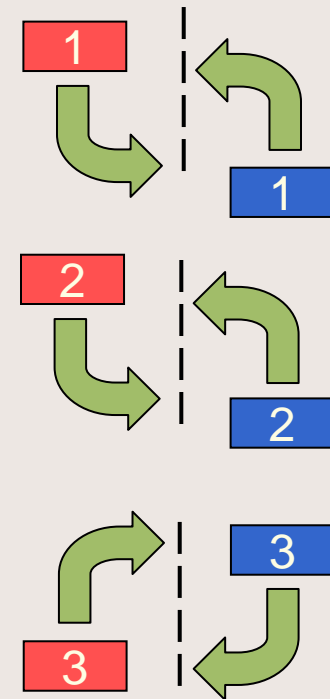Iteration

1
2
3

1
2
3

1 → 2 → 3

1 → 2 → 3

- The applicant has the same problem

- Both sides of the counter break the design into code specialty pieces, parallel or sequential

- High probability of breakdown, iteration and delay

Delays and Potential Gaps

- What if Changes invalidate each other?
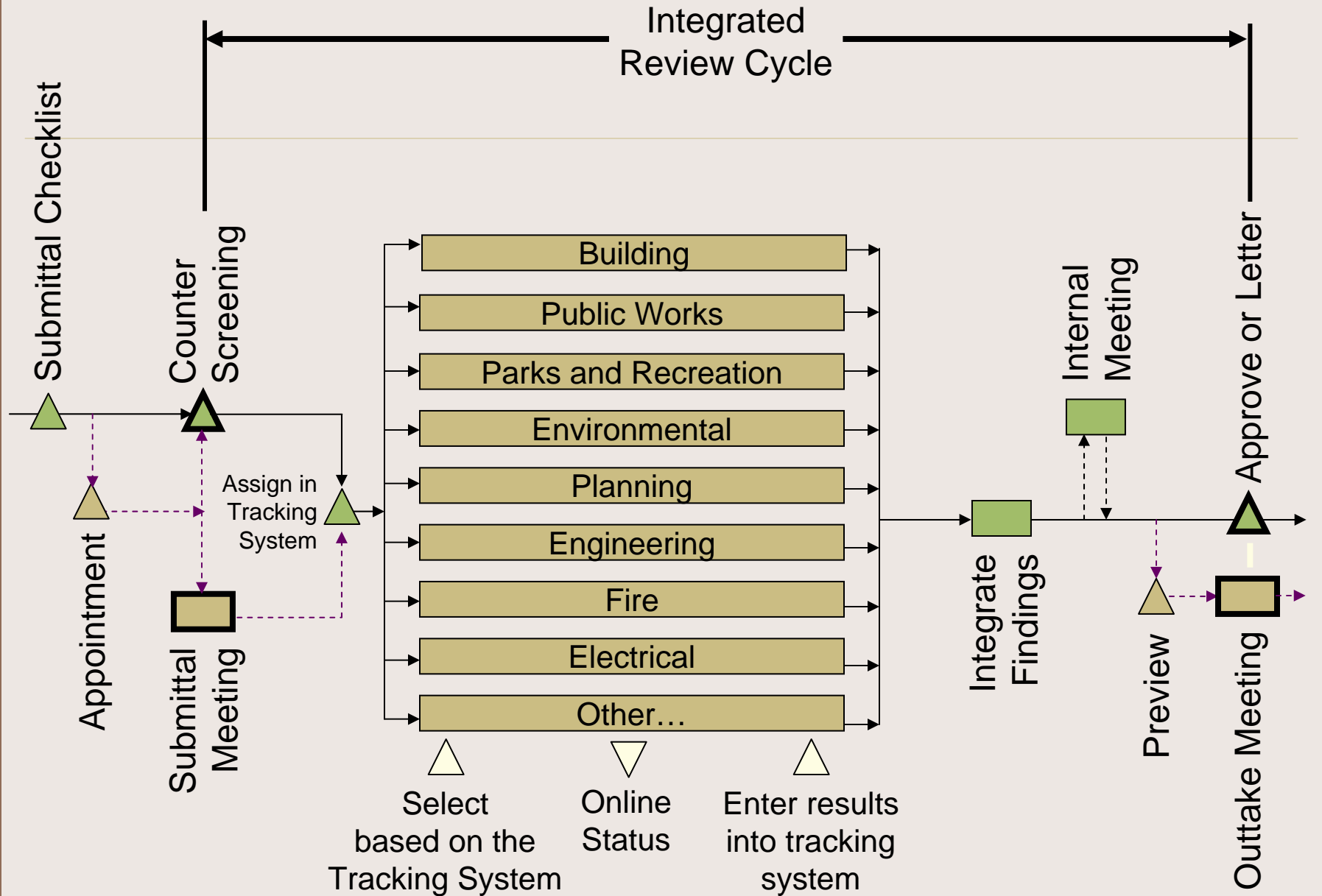- Just what configuration are we approving?
- When are we done?

- What if Changes 2 or 3 invalidate Change 1?
- To the applicant this looks like a "moving target"
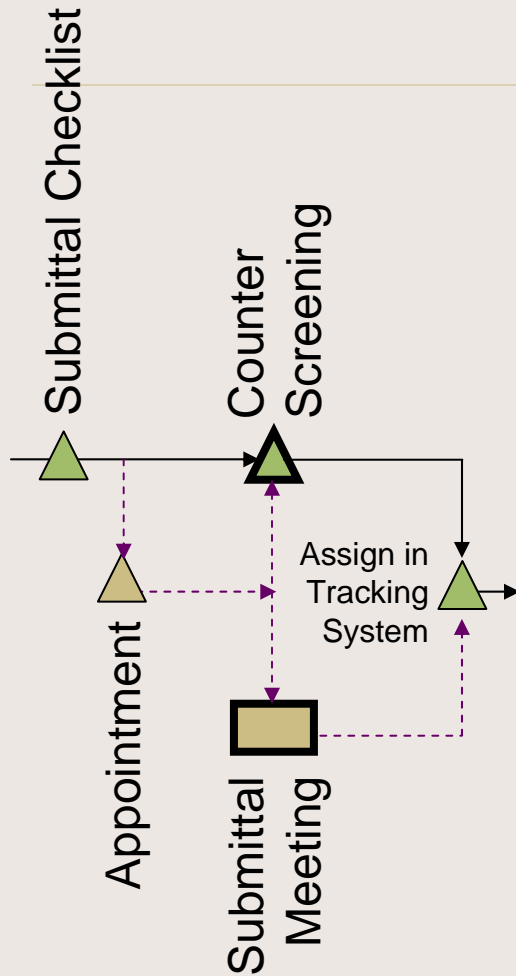- Takes a long time

The Integrated Review Cycle

- The thoroughness of multiple reviewers
- The speed of parallel review
- Made possible by:
  - Submittal screening (a complete application)
  - Integration of review findings and instructions (a complete review)
  - Revision screening (a complete revision)
  - A good control system (who's it)

Integrated Review Cycle

Submittal Checklist

Counter Screening

Appointment

Submittal Meeting

Assign in Tracking System

Building
Public Works
Parks and Recreation
Environmental
Planning
Engineering
Fire
Electrical
Other…

Select based on the Tracking System

Online Status

Enter results into tracking system

Integrate Findings

Internal Meeting
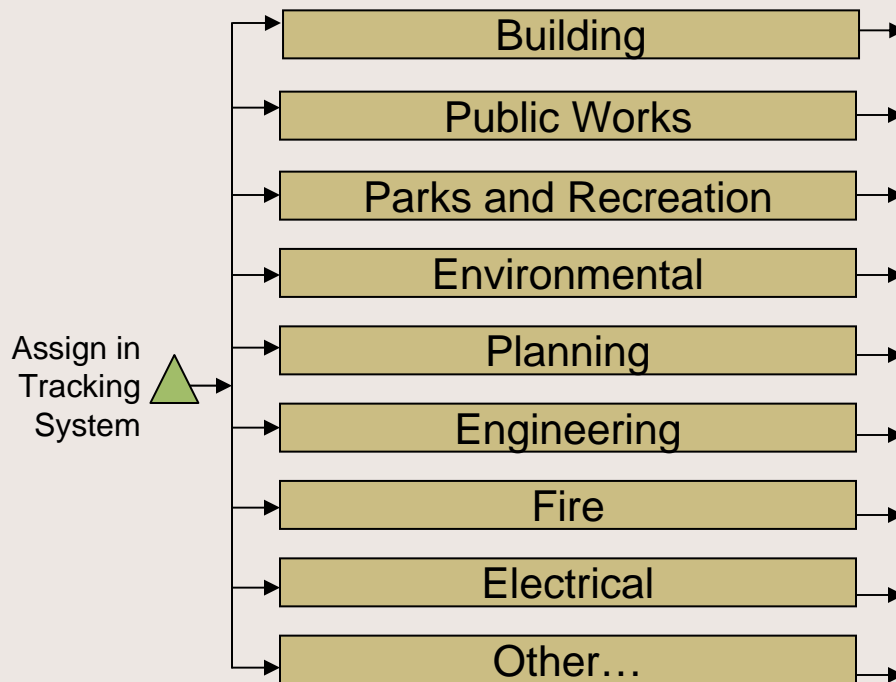
Preview

Approve or Letter

Outtake Meeting

1. Submittal Screening

- Published submittal checklists

- Informal counter support

- Pre-application meeting option

- Real-time screening at submittal

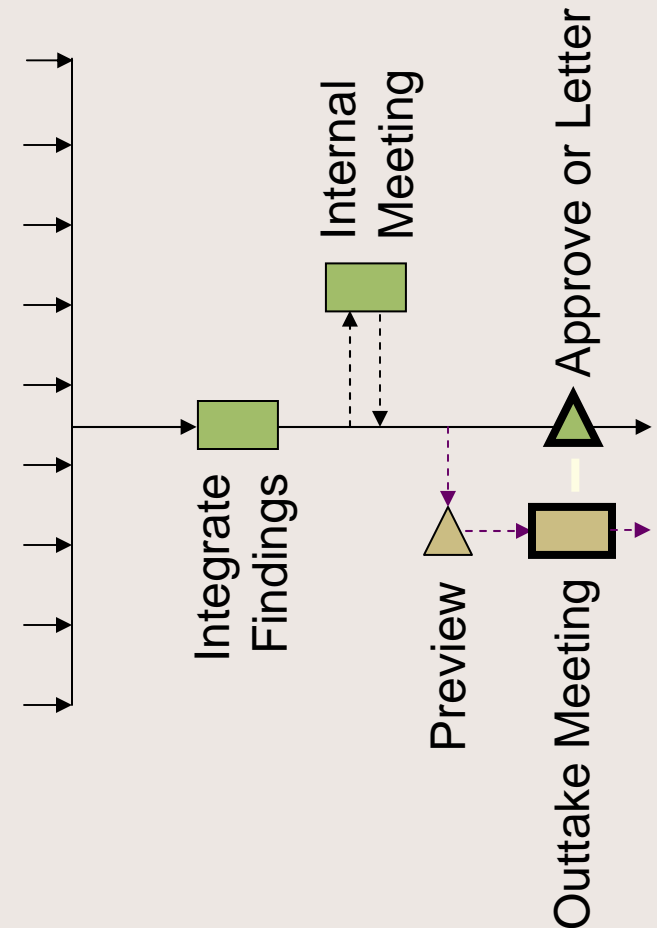- The Integrated Review Cycle starts when screening is successful

2. Thorough, Parallel Review

Assign in Tracking System

- Building
- Public Works
- Parks and Recreation
- Environmental
- Planning
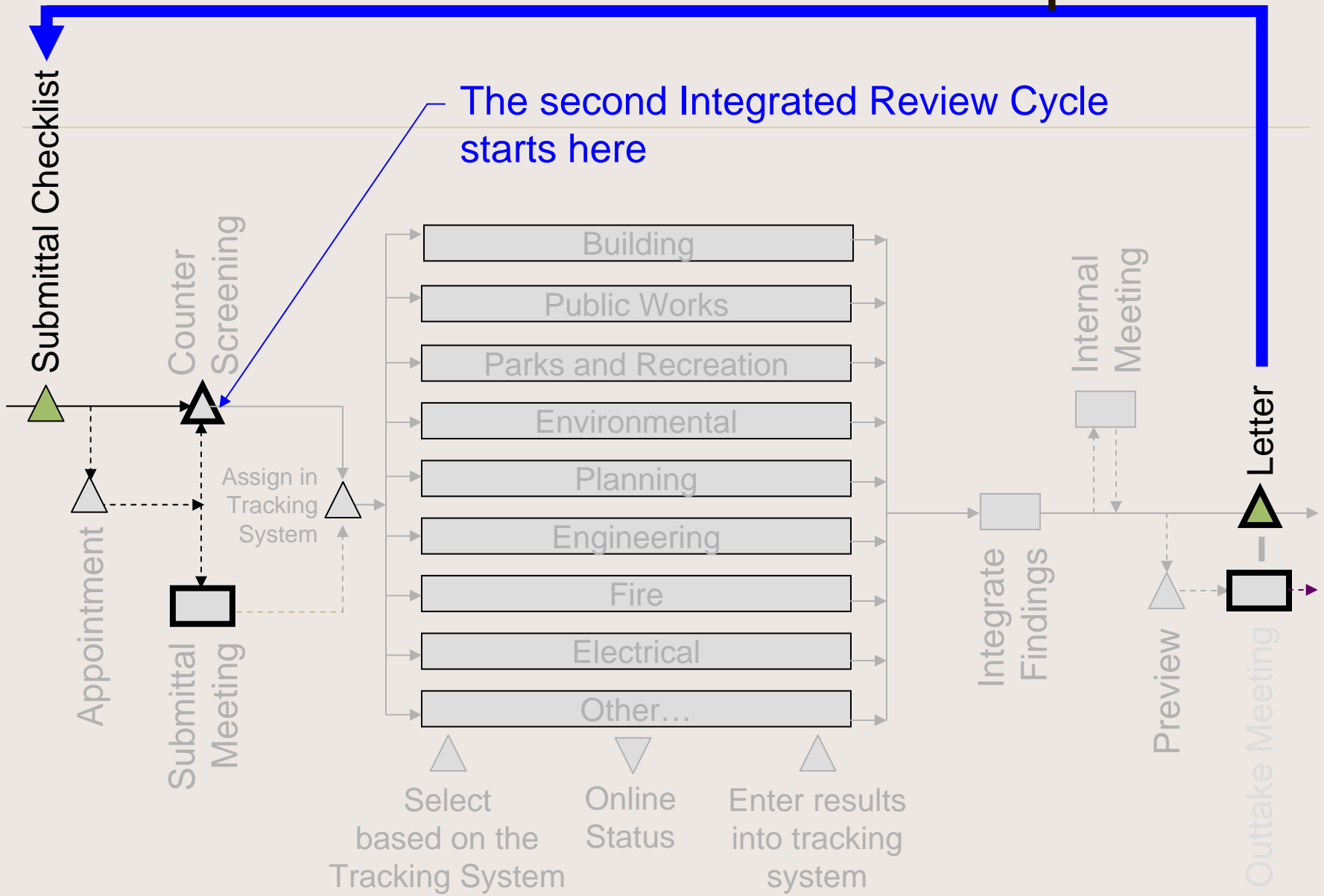- Engineering
- Fire
- Electrical
- Other…

- Assigned personnel conduct their reviews

- Review checklists add consistency

- Evaluate plans fully

- Build a list of any required corrections

- Transmit corrections list or any conditions to the *integrator*
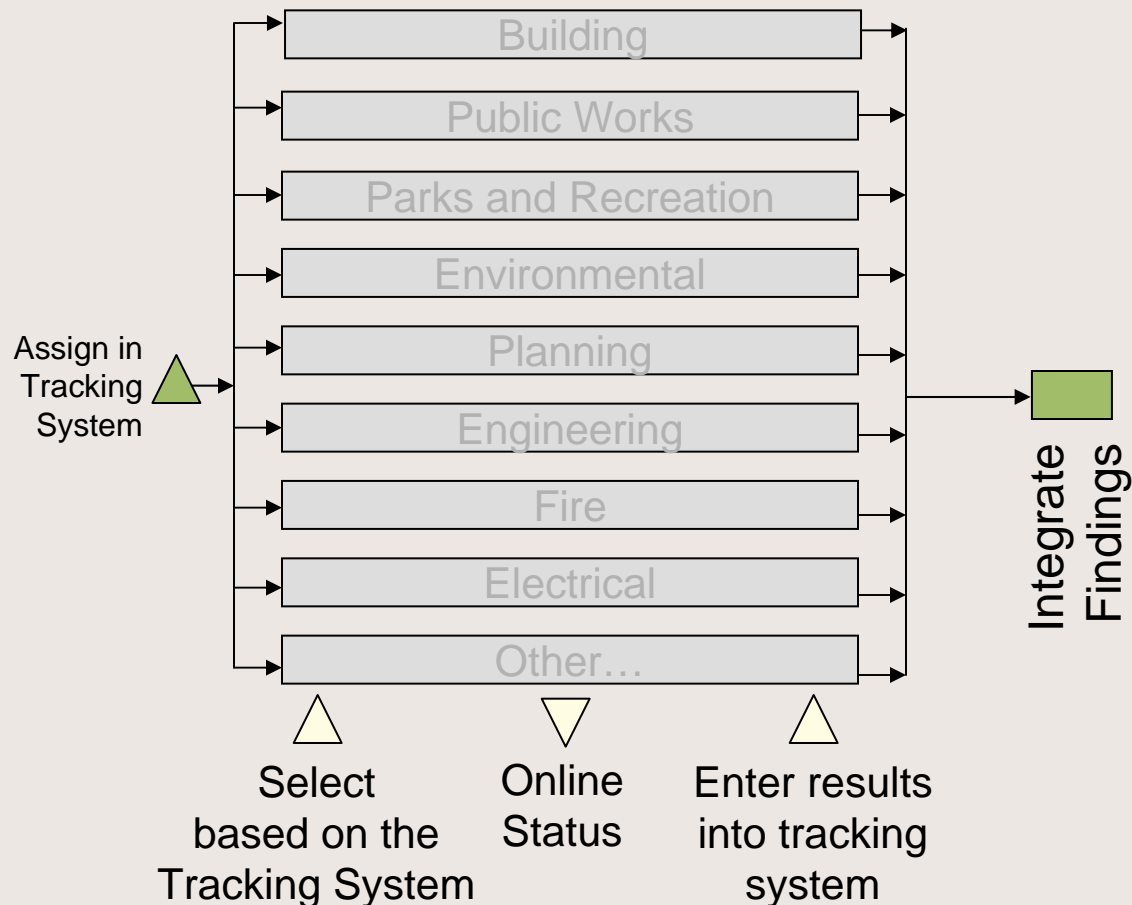
3. Integrate and Explain Findings

- Integrator combines the findings:
    - Removes overlaps, duplicates
    - Resolves any conflicting instructions
    - Calls a reviewer meeting to resolve any complex issues
- Document is released to the applicant
    - Sent to the applicant if straightforward
    - Explained in a meeting if complex
    - The Integrated Review Cycle ends here
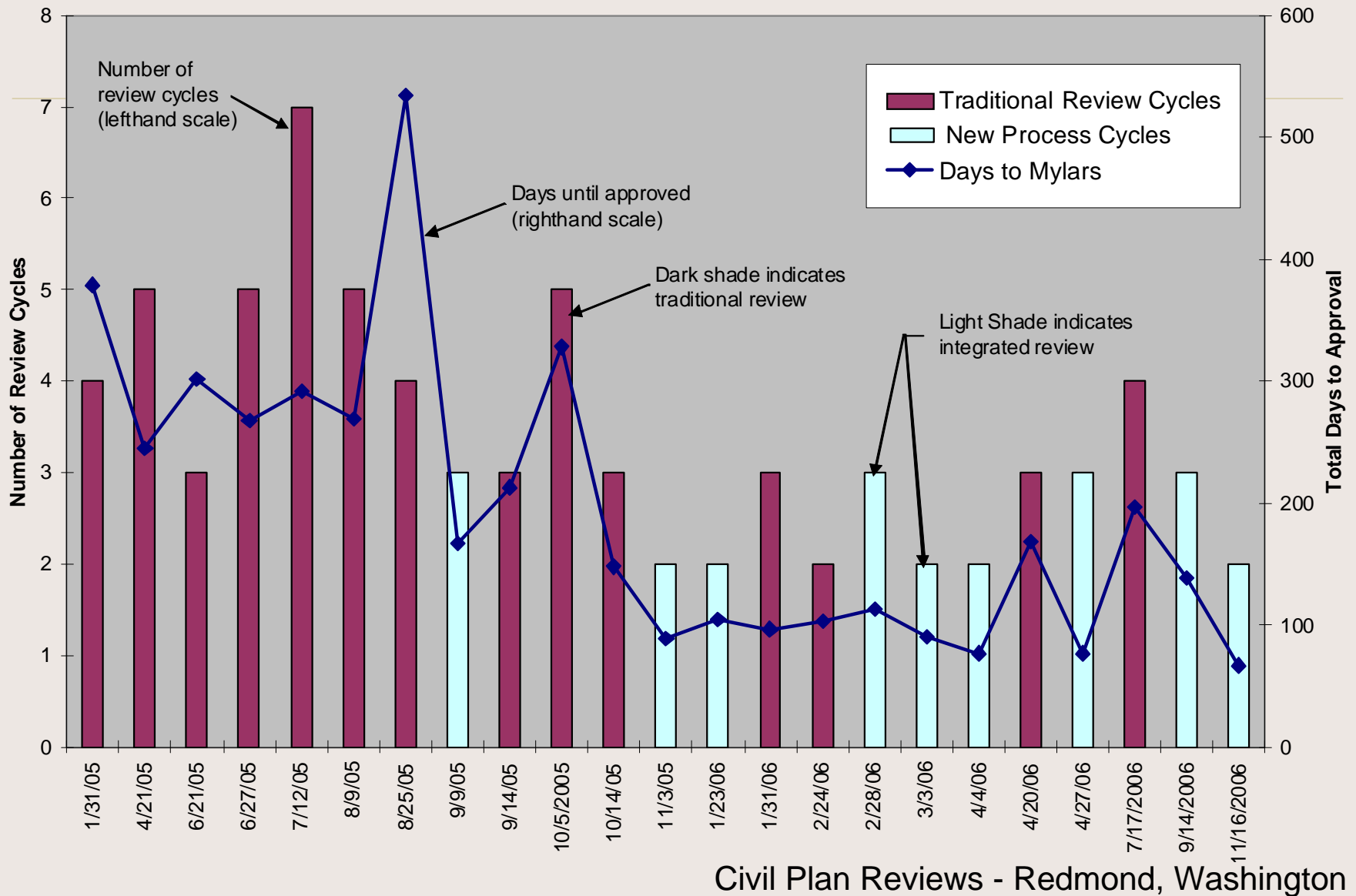- This document becomes the submittal checklist for the revision

Integrate Findings

Internal Meeting

Preview

Outtake Meeting

Approve or Letter

4. Revisions Must be Complete

Submittal Checklist

Counter Screening

The second Integrated Review Cycle starts here

Building

Public Works

Parks and Recreation

Environmental

Planning

Engineering

Fire

Electrical

Other…

Appointment

Assign in Tracking System

Submittal Meeting

Select based on the Tracking System

Online Status

Enter results into tracking system

Integrate Findings

Internal Meeting

Preview

Letter

Outtake Meeting

5. A Good Control System

The Results

Civil Plan Reviews - Redmond, Washington
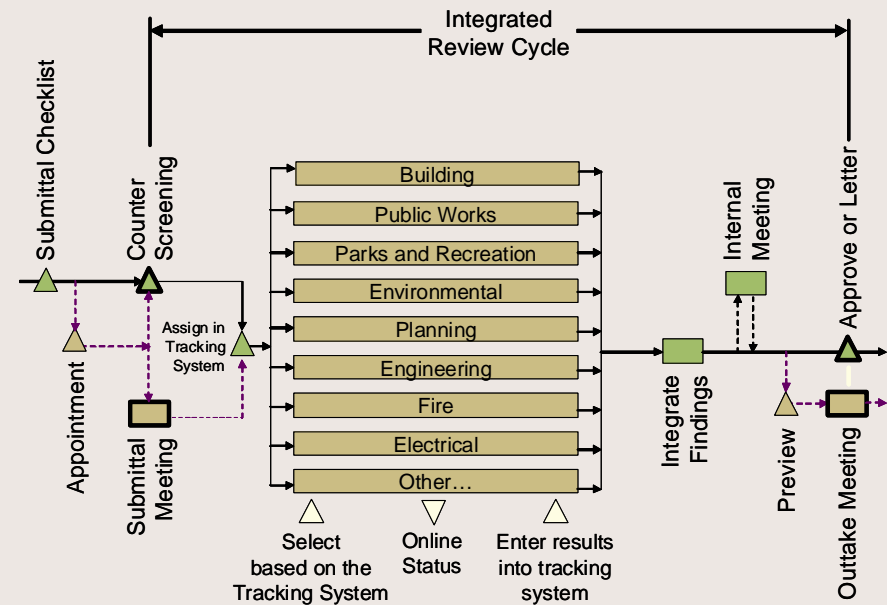
Integrated Review Cycle

- Submittal screening (complete application)

- Thorough, parallel, and prompt review

- Integration of review findings, instructions (a complete review)

- Revision screening (a complete revision)

- A good control system (who's it)

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