

Memorandum

Date: November 16, 2009
To: Members of the Development Community
From: Tim Gauss, Senior Director, Development Services
Town of Morrisville
Re: Project Review Process

The attached Project Review Procedures for the Town of Morrisville materials have been prepared by staff of the Development Services Directorate of the Town (Planning Department, Engineering Department, Inspections Department) to map out the procedures the Town follows in reviewing private and public development proposals. The material identifies the various steps in the project review process, including the sequencing of steps, the responsible department/staff at each stage, and the submittal requirements for each step.

Our purpose in compiling this material is to help applicants and designers successfully navigate through the Town's development process, and to better communicate with the Town's elected and appointed Boards, members of the development community, staff, and other interested citizens about the Town's development review process.

These materials are presented in response to a need originally identified in a survey of the development community. Working in conjunction with the Chamber of Commerce in the fall of 2004, Town staff developed and circulated an extensive survey of how the Town's project review process was perceived by the development community.

We received a variety of comments regarding the review process, including criticisms that the process was unpredictable in terms of 1) poorly defined engineering standards (with reliance on staff interpretation) and 2) unclear path and timing of reviews. The attached materials are intended to provide greater predictability in the development review process.*

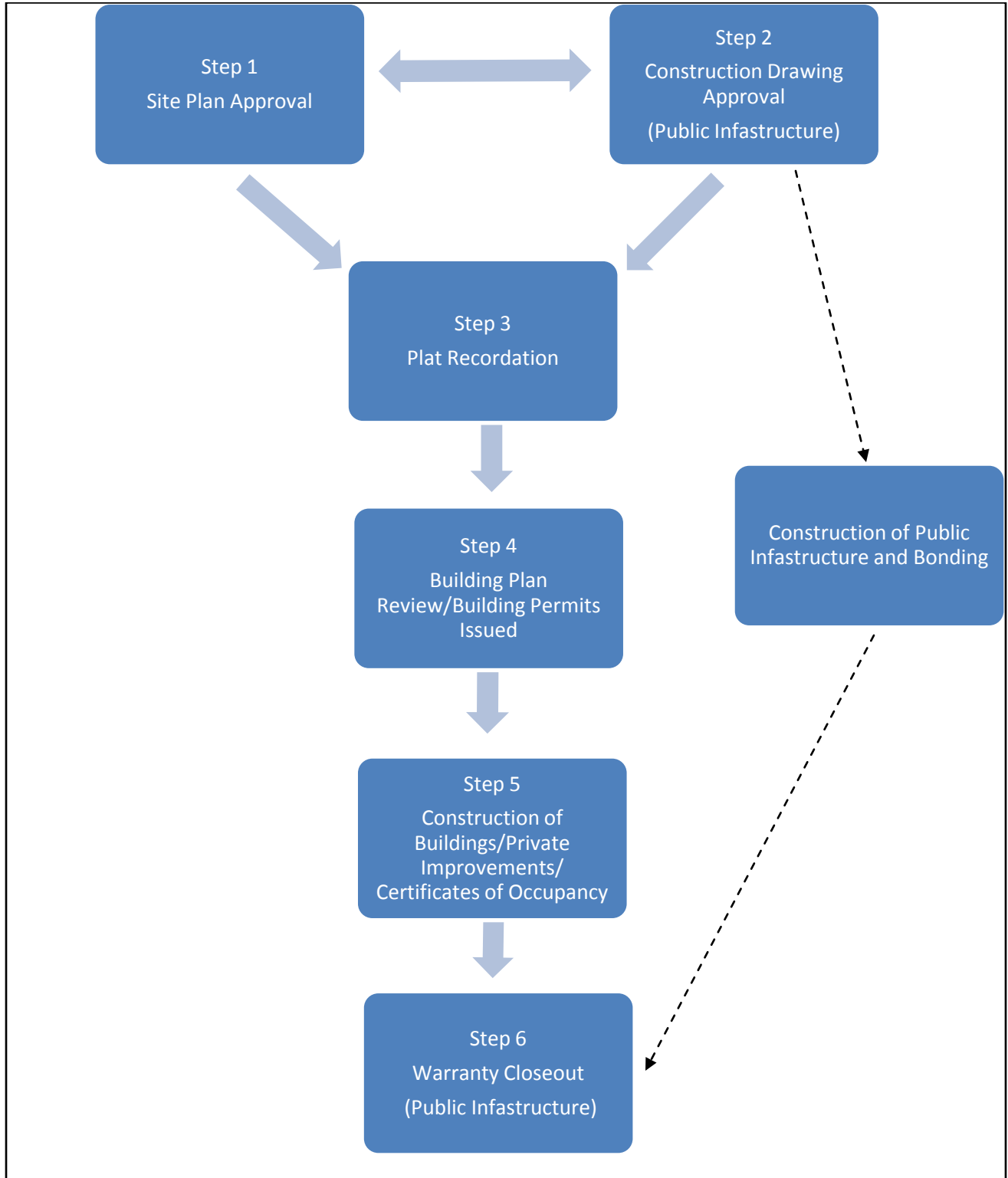
The review procedures are available in hard copy or at the Town's website www.townofmorrisville.org.

We look forward to working with you as we build Morrisville together.

* To address the issues of substance and uncertainty of the engineering standards, new standards (*Design and Construction Ordinance*) were adopted by the Town of Morrisville Board of Commissioners in November 2007 (effective date January 1, 2008) after a process involving extensive participation of the development community. The document may be accessed on the Town's website.

Development Review Process

Town of Morrisville



Town of Morrisville Development Review Process & Potential Roadblocks

Step 1 - Site Plan Approval *(Including site plans, preliminary plats for SFU detached, Conditional Use Zoning, Special Use Permits)**

What happens?

1. Site Plan Preparation and Review

- Pre-submittal conference with various Town staff prior to designer preparing any drawings (at least 45 days before formal submittal) to 1) go over site plan submittal requirements, including Transportation Impact Analysis (TIA), review procedures, expiration or reversion schedules; 2) get applicant contact information; and 3) identify major planning, engineering, other issues;**
- Additional informal meeting(s) with Planner; Town Engineer; Parks, Recreation, and Cultural Resources staff/Greenway Planner to address site plan issues and comments;
- Additional formal meeting(s) with Town Transportation Planner to 1) review Memorandum of Understanding (MOU) for TIA and 2) review draft TIA once prepared (**Note: Signed MOU must be submitted to Planning at least two weeks prior to intended site plan submittal; completed TIA submitted with site plan**)
- Submittal of complete site plan and supporting material at least two days prior to intended site plan submittal deadline; Planning Department staff to review: if submittal complete site plan accepted for review; if not, application to be revised and resubmitted by published deadline. (**Note: Incomplete applications will not be accepted**)
- Site plan submittals shall consist of the following documents:
 - > *Site Plan Application w/ Fees*
 - > *Site Plan (Consistent with Checklist)*
 - > *Completed Checklist*
 - > *Final TIA (with MOU)*
- Review of site plans submitted: Town comments coordinated through designated staff Planner; designer response and revision of site plan
- Internal staff Interdepartmental review; staff opinion/recommendation on rezoning petitions; evaluation/recommended conditions on site plans
- Staff recommendation of (revised) site plan (with conditions)
- Place on next Planning and Zoning Board (PZB) agenda

2. Planning and Zoning Board (PZB)

- Staff report (*Briefing Sheet*) with recommendation and conditions
- Schedule on PZB agenda
- Staff meet legal notice requirements, if any
- Public meeting before PZB and vote/recommendation

**Process outlines formal review process; Planning staff may also approve internally minor revisions to site plans per Part D Article II Section 9 of the Zoning Ordinance*

***For Town-initiated projects, the purpose of this meeting is expanded to include development of a conceptual layout; additional staff participate, including representatives of the lead department, engineering, and other departments*

3. Board of Commissioners (BOC)

- Revised staff report
- Place on BOC agenda
- Staff meet legal notice requirements, if any
- Public meeting before BOC
- BOC vote/decision

What can slow you down?

- Missed mandatory pre-submittal conference
- Incomplete application not accepted for review; missing checklist items
- Memorandum of Understanding for TIA not finalized;
- TIA not finalized
- Submittal deadlines missed
- Staff comments not addressed
- Controversial project or site
- Planning and Zoning Board or Board of Commissioners request additional information
- Staff workload, coordination

Questions? Call Morrisville Planning Department 463-6194

Town of Morrisville Development Review Process & Potential Roadblocks (cont'd)

Step 2 - Construction Drawing Approval and Construction/Installation of Improvements (*Public Infrastructure*)

What happens?

1. Construction Drawing (CD) Preparation and Approval

- Documents Required for Formal CD Submittal
 - *CD Application w/ Fees*
 - *CD in accordance with Checklist*
 - *Checklist completed*
- Staff comment/designer response (Designer encouraged to initiate face-to-face discussions of areas of disagreement and/or misunderstanding)
- Notify Wake County Soil and Erosion Control
- Staff approval/release of (revised) CD's

2. Construction/Installation of Infrastructure

- Pre-construction conference
- Construction/installation of infrastructure
- Town of Morrisville Engineering Inspectors inspect/approve construction of public infrastructure at various stages

What can slow you down?

- Skip preconstruction conference
- CD, application missing checklist items
- Submittal inconsistent with site plan
- Staff comments not addressed
- Staff comments, designer responses not clear
- Lack of direct discussions to resolve areas of disagreement or misunderstanding
- Unauthorized changes to drawings
- Staff overall workload
- Appointments with Engineering Inspectors not made
- Unauthorized changes or deviations from CD's made in field

Questions? Contact Morrisville Engineering Department @ 463-6169

Town of Morrisville Development Review Process & Potential Roadblocks (cont'd)

Step 3 - Plat Recordation

What happens?

1. Draft Final Plat Review Submittal

- Documents Required for Draft Final Plat
 - > *Final Plat in accordance w/ Checklist*
 - > *Fee Schedule Form with Final Plat Application*
- Review of Draft Final Plat with staff comments and designer response/revisions
 - > *Document Required: Revised Final Plat*
- Once all staff comments addressed, preparation of Final Record Plat

2. Final (Record) Plat

- Plat circulated by staff to obtain signatures
- Applicant/designer records Final Plat at Wake County Register of Deeds

What can slow you down?

- Plat submitted prior to CD approval
- Incomplete submittal/Final Plat missing required items
- Submittals do not address Town's specific requirements
- Staff comments not addressed
- Determination of what may be bondable (*Cary and Morrisville*)
- Addressing details (e.g., signatures from all parties)
- Functional hydrants (*Cary requirement*)
- Staff workload/coordination

Questions? Contact Morrisville Planning Department @ 463-6194

**Town of Morrisville
Development Review Process & Potential Roadblocks (cont'd)**

Step 4 - Building Plans Approval & Issuance of Building Permits (*Private Habitable Structures*)

What happens?

1. Building Plans Reviewed for Compliance with International Building Code

- Pre-submittal conference (New Plans)
- Building plans submitted
 - > *Document Required: Building Permit Application w/ Fees*
 - > *Document Required: Building Plans*
- Fees paid
- Staff comment/Designer response
 - > *Document Required: Revised Building Plans*
- Staff approval of plans

2. Issue Building Permits

- Inspector assigned
- Coordination with Cary

What can slow you down?

- Skip pre-submittal conference
- Incomplete information on building plans
- Submit building plans before CD's or plats approved
- Delays coordinating with Town of Cary, other Town departments
- Clarifying issues about prepaid fees for public water and sanitary sewer with Cary

Questions? Contact Morrisville Inspections Department @ 463-6187

**Town of Morrisville
Development Review Process & Potential Roadblocks (cont'd)**

Step 5 - Construction of Private Improvements (*Private Habitable Structures*) and Issuance of CO

What happens?

1. Pre-construction Conference

- Building Inspectors Monitor Construction
- Building Inspectors review work in field to insure consistency with approved building plans and International Building Code (IBC) requirements
- Contractors set up appointments in advance for Building Inspectors to review and sign off work
- Corrections made to work in field as necessary

2. Certificate of Occupancy (CO) Issued

- Final walk-through by Inspections, Planning, Engineering Field Inspectors, Fire prior to issuance of CO

What can slow you down?

- Installation, construction not meet IBC
- Construction not consistent with building plans
- Infrastructure not meet standards
- Developer conditions (e.g., infrastructure improvements) not completed or bonded
- Coordination of field inspections appointments
- Citizen, tenant complaints

Questions? Contact Morrisville Inspections Department @ 463-6187

Town of Morrisville Development Review Process & Potential Roadblocks (cont'd)

Step 6 – Warranty and Closeout (*Public Infrastructure*)

What happens?

- 1. Staff Review of Infrastructure and Other Improvements Required per Site Plan Conditions**
 - General contractor notifies Town of completion of required infrastructure and other public improvements
 - Staff and contractor walk site to evaluate adequacy of work done
 - Staff prepares punch list of remaining work to be done, if any
 - Staff inspects work until satisfied it is complete
 - Construction drawings revised as record drawings (“as-builts”) and submitted to Town for review and completions
 - > *Document Required: Record Drawings (“As Builts”)*
- 2. Staff/BOC Acceptance of Infrastructure**
 - Staff issues letter of completion to applicant
 - Staff petitions Board of Commissioners (BOC) to accept infrastructure (agenda item for public meeting; Engineering staff prepare Briefing Sheet and Resolution)
 - BOC action to accept infrastructure
- 3. Commencement of Warranty Period**
 - BOC action begins one-year warranty period
 - Town responsible for regular maintenance; developer responsible for defects due to materials, workmanship, repairs not due to normal wear
- 4. Project Closeout**
 - At end of warranty period, contractor and Engineering Field Inspections staff walk site, identify any items to be repaired by the developer/contractor
 - Staff notifies developer/contractor of completion of required infrastructure improvements, if any

What Can Slow You Down?

- “Premature” conference with staff (i.e., appointment with staff before infrastructure completely installed or ready for acceptance)
- Staff comments about repairs not addressed
- Record drawings (“as-builts”) not prepared and submitted
- Contractor not notify Town of need to initiate warranty period
- Staff workload and coordination

Questions? Contact Morrisville Engineering Department @ 463-6169

Town of Morrisville Development Review Process

Typical Expected Schedule

Tasks/Actions Taken

1.0 Site Plan Approval (including site plans, preliminary plats for SFU detached, Conditional Use Zoning, Special Use Permits)

- 1.1 Pre Submittal Conference
- 1.2 Site Plan Submittal and Acceptance
- 1.3 Planning and Zoning Board
- 1.4 Board of Commissioners

2.0 Construction Drawing Approval

- 2.1 CD Preparation/Approval
- 2.2 Installation of Infrastructure/Staff Inspection/Bonding

3.0 Plat Recordation

- 3.1 Plat Preparation
- 3.2 Plat Recorded

4.0 Building Plan Approval

- 4.1 Plan Review
- 4.2 Issuance of Building Permits

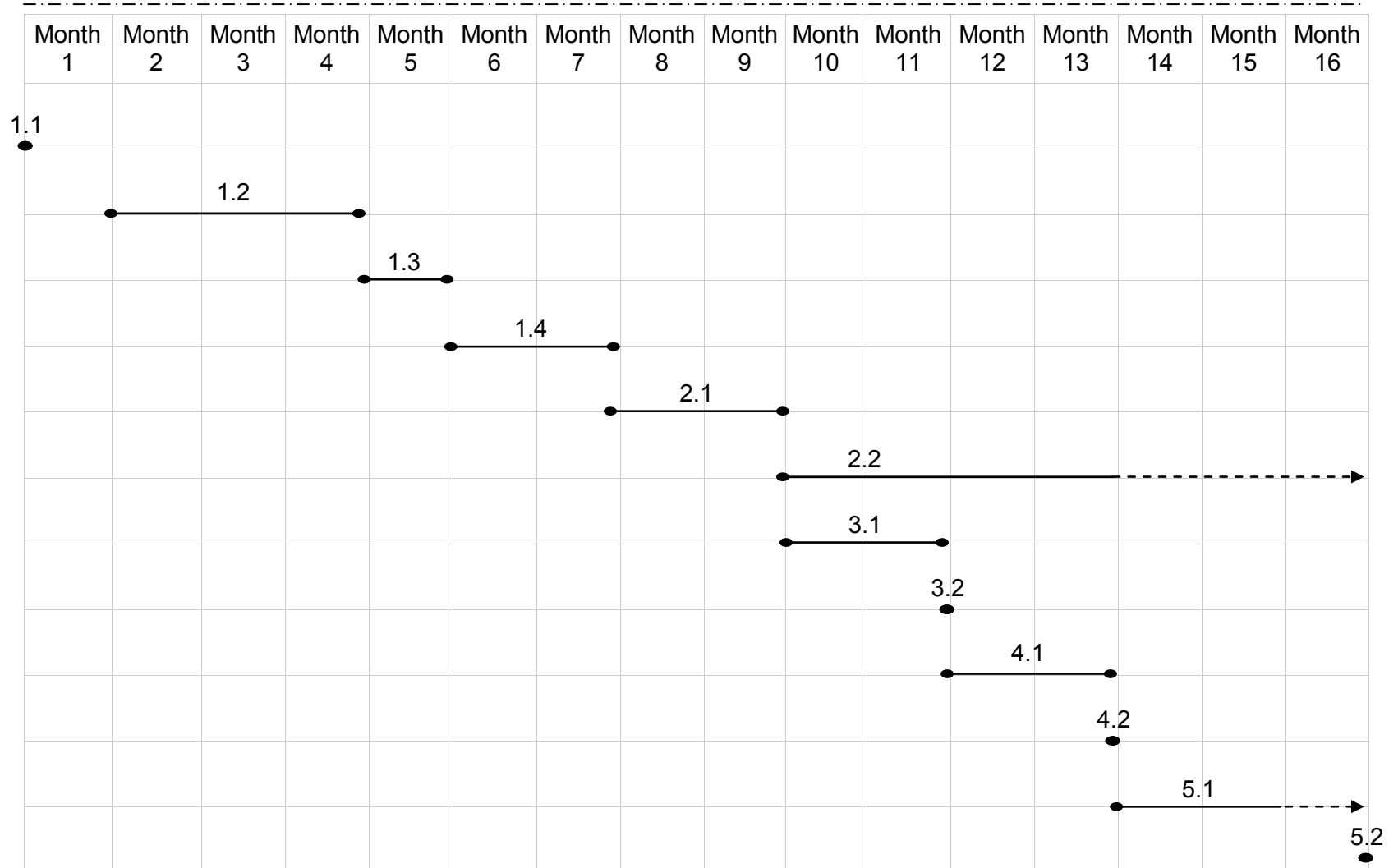
5.0 Building Construction/CO Issuance

- 5.1 Field Inspections/Approvals
- 5.2 Issuance of Certificate of Occupancy

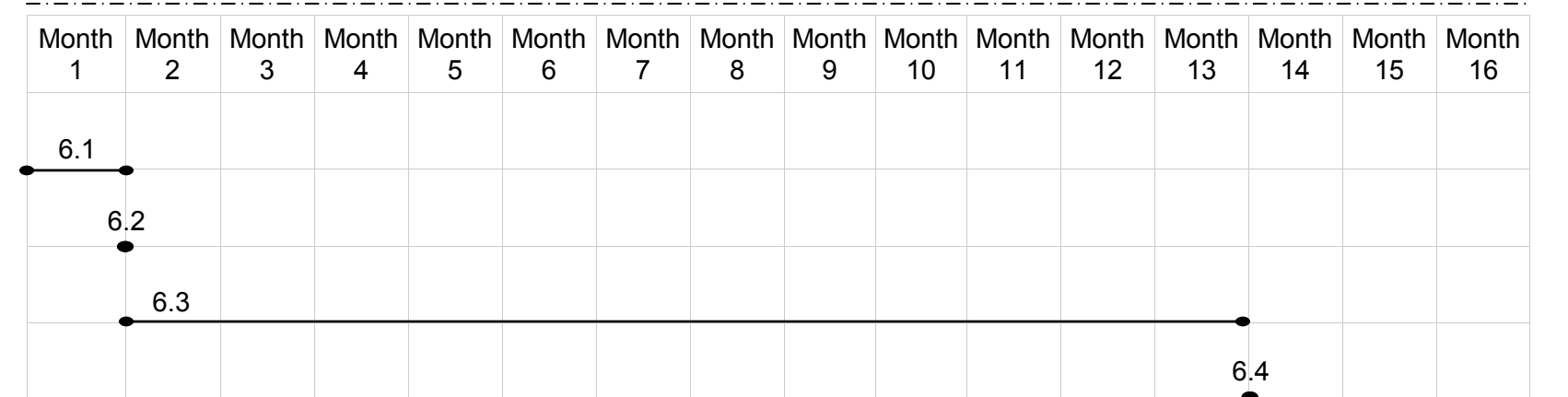
6.0 Warranty and Closeout

- 6.1 Staff Review of improvements (infrastructure)
- 6.2 Staff/Board acceptance of infrastructure
- 6.3 Warranty period (12 months)
- 6.4 Project closeout

Project Review & Construction*



Post Construction



**Estimated/typical timeframe; may vary due to complexity of projects, quality of plan submittal, etc.*