LUNCH | LEARN | LINK
ONLINE PERMIT TRACKING AND DEVELOPMENT REVIEW
Remote and Virtual Engagement and Collaboration Tools for Planners

• Provide help and tools you can use now, as we navigate this new world
• Provide CM credits before the May 28 Grace period ends

• **Michigan Chapter Upcoming Events**
  • Webinars on Thursdays from 2 PM to 3:30 PM, *A Planner’s Response to the Pandemic*
  • Lunch | Learn | Link on Tuesday from 12 PM to 1 PM
  • Planning Law Seminar on Tuesdays starting May 12
  • Book Group, *MAP Reads*, May 27

• **American Planning Association’s National Conference**, April 29-May 1
Why Planning is Still Important: Ten Things Planners Can Do Now

1. Essential Service versus Work from Home (WFH).
2. Remote Work.
3. Hazard Mitigation Team.
4. Virtual Alternatives.
5. Economic Response and Recovery.
6. Repurpose Planning Staff.
7. Scenario Planning.
8. Messaging.
TODAY’S PRESENTERS

Troy Langer, Hartland Township

Brent Savidant, City of Troy

Patrick Sloan, Canton Charter Township

Lisha Turner-Tolbert, City of Ann Arbor
HARTLAND IN MOTION

REMOTE WORKING IN A LOCAL GOVERNMENT SETTING
EO 2020-42

To suppress the spread of COVID-19, to prevent the state’s health care system from being overwhelmed, to allow time for the production of critical test kits, ventilators, and personal protective equipment, and to avoid needless deaths, it is reasonable and necessary to direct residents to remain at home or in their place of residence to the maximum extent feasible. To that end, on March 23, 2020, I issued Executive Order 2020-21, ordering all people in Michigan to stay home and stay safe. The order limited gatherings and travel, and required workers who are not necessary to sustain or protect life to stay home.

The measures put in place by Executive Order 2020-21 have been effective, but this virus is both aggressive and persistent: on April 8, 2020, Michigan reported 20,346 confirmed cases of COVID-19 and 959 deaths from it. To win this fight, and to protect the health and safety of our state and each other, we must be just as aggressive and persistent. Though we have all made sacrifices, we must be steadfast. Accordingly, with this order, I find it reasonable and necessary to reaffirm the measures set forth in Executive Order 2020-21, clarify them, and extend their duration to April 30, 2020. This order takes effect on April 9, 2020 at 11:59 pm. When this order takes effect, Executive Order 2020-21 is rescinded.

Acting under the Michigan Constitution of 1963 and Michigan law, I order the following:

1. This order must be construed broadly to prohibit in-person work that is not necessary to sustain or protect life.
2. Subject to the exceptions in section 7 of this order, all individuals currently living within the State of Michigan are ordered to stay at home or at their place of residence. Subject to the same exceptions, all public and private gatherings of any number of people occurring among persons not part of a single household are prohibited.
3. All individuals who leave their home or place of residence must adhere to social distancing measures recommended by the Centers for Disease Control and Prevention (“CDC”), including remaining at least six feet from people from outside the individual’s household to the extent feasible under the circumstances.
4. No person or entity shall operate a business or conduct operations that require workers to leave their homes or places of residence except to the extent that those workers are necessary to sustain or protect life or to conduct minimum basic operations.
   (a) For purposes of this order, workers who are necessary to sustain or protect life are defined as “critical infrastructure workers,” as described in sections 8 and 9 of this order.
   (b) For purposes of this order, workers who are necessary to conduct minimum basic operations are those whose in-person presence is strictly necessary to allow the business or operation to maintain the value of inventory and equipment, care for animals, ensure security, process transactions (including payroll and employee benefits), or facilitate the ability of other workers to work remotely.
Remote Review Process: NEW HOUSE

1. Land Use Permit Application is completed and submitted to the Planning Department by mail or dropbox; emailed to Department of Public Works determines if public water/sewer fees are required.

2. Applicant encloses a check and pays the required fee to the Treasurer’s Office and includes a signature or email verifying that all property taxes are current.

3. Application is emailed to the Planner and simultaneously reviewed by the Planning Department and the Department of Public Works.

4. The applicant is contacted via phone or email and works with staff to resolve any pertinent issues or concerns.

5. Upon completion of the review, the Land Use Permit is edited using Adobe Acrobat Pro PC, issued electronically, and a copy is provided to the Assessing Department.

6. The applicant is emailed the approved application or schedule a time for pick-up of hard copies, if required, presents the Land Use Permit and attachments to the Livingston County Building Department to apply for a Building Permit.
Remote Review Process: SITE PLAN REVIEW

Site Plan Application is completed and submitted to the Planning Department by email, mail, or dropbox.

Applicant encloses a check (or sends it separately if the application is emailed), pays the required fee to the Treasurer Office, staff obtains signature or email verifying that all property taxes are current.

Application is scanned and emailed to the Planner, DPW, Township Engineer, and Fire for review and comments.

The applicant is contacted via phone or email and works with staff to resolve any pertinent issues or concerns.

Applicant meets (in person or virtual) with the Site Plan Review Committee for their review and comments.

Staff gathers all comments, creates the staff memorandum. Site Plan is reviewed and approved by the Planning Commission.
A2 COVID-19 Service Coverage

Presented By:
City of Ann Arbor, Community Services
Building and Rental Service Manager: Lisha Turner-Tolbert

Support Team:
Service Area Administrator: Derek Delacourt
Planning Service Manager: Brett Lenart
To continue services through the COVID-19 pandemic, the City relies heavily on the current permitting, inspection, and record retention software called TRAKIT for internal use and ETRAKiT the public-facing online application.

The ability for Developers, Architects, and Contractors to submit site plans and interact with Planning online via ETRAKiT has been in place since 2011; however, construction plan submission online has not been in place before COVID-19.

So What Changed...

- Although digital submission has been available several years for site plan submission within the Planning department, paper plans are still required and reviewed manually by staff. During the COVID-19, site plans have only been received in a digital format and now examined entirely online.
- The administrative process for staff has stayed the same with the help of IT services equipping each Admin with a laptop or Citrix software application to access City servers.
- On the construction side; Architects, Contractors, and Engineers can submit their plans and application via email directly to the Admin staff for processing.
- Once the application has been processed and plans have been attached to the permit, the plan review team (building, engineering, forestry, and planning) can then access the plans and commence a digital review using a plan review software called Blue Beam. Stamps, comments, and signatures are applied to the drawings using an Adobe application, and review notes are created in pdf for the applicant.
COVID-19 Permitting Protocol

To continue permitting services for commercial and residential, we had to change the way we do business and traditionally interact with the public.

These are the changes;

- IT services provided laptops or Citrix access to the entire Admin staff allowing full access to the City Servers, excluding the financial system used to process payments.
- The City required only digital submission of permit applications via email for processing.
- The staff can process applications in TRAKiT, then attach the completed permit to the file for public access through ETRAKiT. Admin will also email permits to the applicant when requested for their convenience.
- Due to the staff’s limited ability to take payment, applicants are invoiced and encouraged to pay online through our Chase payment system but mailed in payments are accepted for particular circumstances and large projects.
- Once the applicant has been invoiced, they can schedule inspections for their permit and keep their projects moving forward.
- Staff also has the ability to answer phone calls, retrieve voicemails and emails remotely.
The City has also developed a modified inspection service to support projects that continue the construction and rental process.

These are the slight modifications;

- The inspection staff has been equipped with laptops, iPads, or Citrix to fully access TRAKiT and plan review functions on the City servers.
- Inspectors have changed their process and taken a different approach to manage inspection requests. Inspection request are still accepted from the public through ETAKiT; however, each inspector will now contact the requestor to discuss the best method to conduct an alternate inspection based on the job.
- Inspectors have been given the authority by Building and Rental Management to accept alternate inspection methods such as video conferencing, face time inspections, or third party validation of work complete.
- These alternate measures are used by both building and rental for rough inspections, selected plumbing, electrical, mechanical, rental re-inspections, and pre-inspections for housing.
- Final inspections are often scheduled as a last sign off once the stay at home order is lifted but, these temporary measures have allowed small projects to continue and afforded landlords the ability to populate their properties on a temporary certificate of compliance.
COVID-19 Overall Impact on Services

In closing, the impact on services during the pandemic has been minimal for building and trades permitting as most projects in the city have ceased operation. There has been a consistent flow of permit application submitted but at a manageable rate for staff to provide next day or same-day processing.

Plan review has been affected in a very positive manner, and we have been forced to move services online, which was part of our future pulled ahead for a very worthy cause. We intend to continue expanding the capability of the digital plan review among other service areas within the city and our third-party review team. Planning will continue to improve their online site plan submission and incorporate full digital plan review.

Inspections have been impacted the most and will take some time to adjust once full operations are back in place. We anticipate needing time to catch up in the field and regain our inspection standards but, the current process has allowed the inspection staff to better connect with contractors to develop a more time-efficient plan of how to conduct inspections moving forward.

Thank you for your time and attention.

City of Ann Arbor,
Community Services
Building and Rental Service Manager: Lisha Turner-Tolbert
Lturner-Tolbert@a2gov.org
734-794-6000, Ext. 42669
Canton Township Background

- Canton’s current population is almost 100,000 and still growing (9% population growth since 2010)
- The Planning Services Division is one of four divisions within the Municipal Services Department
- Canton uses CityView© for as its permit and tracking software, but does not have a plan review software
- Township facilities have been closed since March 16th and several site plans are under review. Site plan review of paper plans is limited, so it’s a good time to demo plan review software.

Canton Township Municipal Services Department

- Building & Inspection Services Division
- Engineering Services Division
- Planning Services Division
- Public Works Division
Demo of Free Trials of Plan Review Software: Bluebeam© Revu© and PlanGrid©

• Both are designed mostly for the construction industry, but also very useful to planners.

• Both have free trials (21 days for PlanGrid and 30 days for Bluebeam Revu). After the free trial:
  • PlanGrid starts at $39/month.
  • Bluebeam Revu starts at $349 per seat.

• Both are designed for multiple users, but I have been the only user of my versions.

• Markup tools are similar to Adobe Acrobat Pro (drawing, highlighting, text boxes, measuring, etc.)

• Both provide PDF creation, so you can export plan markups as a PDF.

• Both allow you to tag/label sheet numbers, which makes the review and overlay process easier.

• Both allow overlay of 2 versions of a plan and both color only the differences. If the alignments don’t match:
  • In PlanGrid, drag one plan over the other to change alignment. Aligns as you drag, so much easier to fix alignment.
  • In Bluebeam Revu, select 3 common points on each page to align. Difficult when alignment discrepancies are major.

• So far, I’ve used both programs to review 1 industrial site plan, 2 multi-family residential site plans, and 2 single-family residential site plans.
Site Plan Review Using PlanGrid

- Mygrant Glass – 81,558-sq. ft. warehouse and distribution facility
- Review of revised plans
  - Upload sheets of plans, including any revised versions, date the plan sets, and tag sheet numbers of each set (e.g., L-1, L-2, etc.).
  - When overlaying the revised plan and the original plan:
    - Areas removed from the original plan are in **blue**
    - Areas added to the revised plan are in **red**
    - Areas that are the same between the 2 plans are in black
- Mygrant Glass was approved during the Township facilities closure.
Site Plan Review Using PlanGrid

Compare Sheets button, then select sheet to compare

Tools for markups, notes, measuring, etc.
Silt fence moved in to protect existing trees

Locations of tree and light fixtures changed
Site Plan Review Using Blubeam© Revu©

• Berkshire Apartment Homes – 172 multi-family units (proposed expansion of an existing multi-family development)

• Review of revised Planned Development, so the site plan is more conceptual at this point.

• Upload sheets of plans, including any revised versions, date the plan sets, and tag sheet numbers of each set (e.g., 1 of 12, 2 of 12, etc.).

• When overlaying the revised plan and the original plan:
  • Areas removed from the original plan are in blue (although you can select any color)
  • Areas added to the revised plan are in red (although you can select any color)
  • Areas that are the same between the 2 plans are in black

• Some revisions required, and public hearing date/time TBD.
Right click sheet thumbnail to select Overlay Pages

Tools for markups, notes, measuring, etc.
New parking area, maint. bldg., change, new sidewalks, Bldg. 19 with 2 fewer units.

Bldg. unit orientation change and shift, and new sidewalks
Final Thoughts

• Using both programs has saved a lot of time (and table space at home) spent flipping back and forth between paper plans. Subtle plan changes are easily found.

• So far, the response from applicants has been positive.
  • Applicants haven’t had to print and submit plans recently unless necessary.
  • Applicants can still get review comments and plan markups while Township facilities are closed.

• If you do a lot of plan review and have the extra time, I recommend trying the free trial of either or both to see how the software works for you.

• If you have Adobe Acrobat Pro or similar PDF software, experiment with its tools for drawing, measuring, highlighting, text boxes, and scaling/measuring. I’ve done this for other development reviews while the office has been closed.

• Coordinate with your building department, engineering department, and any other potential users to determine what their needs might be for plan review software.
THREE TYPES OF IMPROVEMENTS

1. Improvements implemented pre-COVID-19
Improvements implemented pre-COVID-19...
2008 - Zucker Report

• Development Permit/Approval Review

• Planning, Engineering & Building Departments

• 102 Recommendations – Best Management Practices
PAPERLESS AGENDAS

- City Council
- Planning Commission
- ZBA
• BS&A

• Planning, Engineering, Building & Code Enforcement
• Planning Page on City Website

• 24/7 Access

• All Development Applications
2008 – Great Recession

• 30% reduction in City staff

• Significant reduction in property values

• Recovery Strategy –
  “FAST, FAIR & PREDICTABLE”
Many of the tools that helped make Troy competitive also helped Troy continue to process development applications during the COVID-19 pandemic.
Improvements implemented in response to COVID-19...
REMOTE MEETINGS

• GoToMeeting

• Internal Meetings

• City Council & Planning Commission
REMOTE INSPECTIONS

• Building Inspections

• Zoom
Needs improvement...
NEEDS IMPROVEMENT

• Payment with credit card or mobile payment service

• Remote public hearings
NEEDS IMPROVEMENT

• Still not 100% paperless
• Laptops with cameras
Thank you to our presenters

This presentation and other resources will be placed on MAP’s website, www.planningmi.org

Look for the Planning Tools During COVID-19 button