MHA and Incentive Zoning Workplan Program Improvements
SDCI and OH Program Improvements 2017/8

Category / Action #	Deliverables	Lead Department	Status	Due Date	Related Audit Recommendations	Comments
A. Program Management and Internal Controls:						
1	Update/finalize all changes to new permit tracking system to ensure systems are in place to implement, document and monitor Mandatory Housing Affordability (MHA) and Incentive Zoning (IZ) requirements, Phase 3	SDCI/Seattle IT		1Q 2018	2, 9	Some changes will occur with the transition to Accela in late spring 2017, however these changes do not include all of the necessary changes, which will be initiated after initial Accela Implementation. Desired date for implementation of additional changes 4Q2017, but SDCI will need to coordinate and validate implementation timeline with Seattle IT. Include field for vesting date, and reporting.
2	Ensure that the Seattle Department of Construction and Inspections (SDCI) and the Office of Housing are tracking projects in the same system by providing OH Access to SDCI's project tracking system (Accela)	SDCI/OH/ Seattle IT	In progress	2Q 2017	2	Awaiting Accela Implementation May/June 2017
3	Hire Program Manager Lead, SDCI	SDCI	In progress	2Q 2017	1	Position being reclassed, then hiring
4	Hire Quality Control (QC) Supervisor Lead, SDCI	SDCI	Complete		1	
5	Hire additional Planner staff to handle extra workload	SDCI		1Q 2018	1	1 FTE funded in 2018 budget, more may be needed as mandatory requirements go citywide - TBD
6	Implement QC review on all Incentive/MHA projects	SDCI	Complete		1,5,6,15	Supervisory review added to all projects in system, to ensure consistent documentation, calculation of contributions and procedural/legal requirements have been met.
7	Document & confirm MHA Program Roles & Responsibilities	SDCI/OH		3Q 2017	1	Focused on hiring new positions in SDCI, documenting new responsibilities for the supervisor & manager positions and validating distinctions between SDCI and OH MHA management roles
8	Develop and execute an MOA between OH and SDCI outlining roles and responsibilities	SDCI/OH		4Q 2017	1	
9	Develop and finalize staff procedures for IZ and MHA (Intake to Permit Issuance)	SDCI/OH	In progress	4Q 2017	3,5,6,7,8,10	Includes procedures with each staff group (intake to issuance) who have a role in setting up, review and issuance of MHA & Incentive permits. Includes documenting need for collecting OH admin fee, review responsibilities, required documentation details in plans sets, legal documents, QC, coordination w/OH, Law, HSD,King County
10	Create templates for necessary forms/legal documents for MHA and all Incentive options for use by staff and applicants	SDCI/OH	In progress	3Q 2017	3	
11	Create SharePoint site to support interdepartmental coordination	SDCI/OH	Complete		1	Currently used as the place for tracking/coordination of projects until Accela is implemented (OH will be given access to Accela at implementation). SharePoint will also house procedures, templates, etc.
12	Law Dept. review of declarations, covenants & standardized commitment language in plans	SDCI	In progress	3Q 2017	3	Law has reviewed some of the declaration templates.
13	Staff Training on formal, written procedures for MHA as they are finalized.	SDCI	In progress	3Q 2017	3	Staff have received high level training to raise awareness, refresh expectations and procedures, understand audit results and the reason for secondary supervisory review on these projects. As new or updated procedures are finalized, affected staff will receive updated training to ensure full understanding of expectations and responsibilities.

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14	Document roles, responsibilities and procedures for calculating and monitoring the Incentive Zoning childcare requirements in coordination with HSD	SDCI		3Q 2017	3	
15	Have all SDCI and OH staff responsible for verifying/approving Incentive Zoning bonus complete a Financial Interest Statement Form	SDCI	In progress	2Q 2017	14	Ethics & Elections has indicated that Financial Interest Statements are not required since no discretion is exercised in the calculation of contributions and because SDCI staff do not collect payments. However, SDCI will still have review staff complete these forms.
16	When collecting payments, redact personally identifiable info from copies retained	OH	Complete		13	
17	Complete secondary review of audit projects to confirm calculations	SDCI	Complete		4	SDCI has completed review of projects that the auditor found discrepancies with. Per Law, we have no legal ability to reach back and "correct" permits that have been issued, so are focusing on oversight of current and future projects to ensure the consistent documentation calculation and collection of contributions going forward.
18	Validate ability to collect the $550 administrative fee for OH owed on previously issued permits and for the other project for the $30 fee discrepancy.	SDCI	Complete		11	Confirmed with Law, unable to collect if permit issued.
B. Transparency, Reporting, and Customer Service:						
19	Expand data collected to support MHA and IZ Reporting in Accela	SDCI/OH	In progress	1Q 2018	1	with Accela Implementation May/June 2017
20	Develop and publish annual reports - total developer contributions, and detail by project	SDCI/Seattle IT		1Q 2018	1,17	Share program results with the public, such as # of new affordable housing units approved thru issued permits in each year, total monetary contributions paid via issued permits in each year; list of new development projects making contributions (project description & location, contribution details). Coordinate with OH on info they will be reporting.
21	Review/Expand OH's reporting on IZ/MHA outcomes and publish reports online	OH/Seattle IT	In progress	1Q 2018	1,16,18	
22	Develop SDCI Webpage with clear information about the IZ and MHA programs, including information and reports and tools for applicants; coordinate with or link to OH's IZ and MHA webpage	SDCI/Seattle IT		4Q 2017	17,20,21	Goal to have SDCI webpage up by year end, with more detail to follow once other data and reporting needs are completed by Seattle IT in early 2018
23	Develop OH Webpage with clear information about the IZ and MHA programs, including information and reports; coordinate with or link to SDCI's IZ and MHA webpage	OH/Seattle IT		4Q 2017	16, 18	
24	Maintain a regularly updated list of contributions to IZ/MHA for issued development permits and post on OH and SDCI webpages related to IZ and MHA	SDCI/OH/Seattle IT		1Q 2018	17	
25	Create automated calculators for affordable housing requirements to be used by staff and applicants, where applicable, to standardize contributions	SDCI/Seattle IT		1Q 2018	21	Program transparency, designed with updateable fields
26	Create standardized templates for documenting MHA/Incentive info in plan sets & decisions	SDCI	In progress	3Q 2017	3	template for rezone decisions done; Magda assisting with CAD template format

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27	Create standardized language for review corrections to improve consistency in review	SDCI	Complete		3	
28	Provide regular public information on the web and via standard SDCI customer mailing lists to alert developers as OPCD passes updates MHA and Incentive Regulations tied to neighborhood upzones	SDCI		On-going	20	
29	Create Applicant guide for existing projects that are somewhere in the review process who want to opt in after an rezone implementing MHA goes into effect who want to jump into program	SDCI	Complete		20	
30	Create TIP(s) for Applicants regarding MHA and other Incentive program rules, requirements, process	SDCI/OH	In progress	3Q 2017	20	
31	Make required forms/legal documents related to Incentive Zoning available to developers	SDCI	In progress	3Q 2017	1,20,21	
32	Document the roles and procedures for calculating and monitoring projects that use the King County Regional Development Credits program to fulfill Incentive Zoning requirements	SDCI/KC	In progress	3Q 2017	1,3,20	
33	Document annual contribution schedule for affordable housing payments, including past 2 years and post online	SDCI	In progress	4Q 2017	21	
C. Land Use Code Changes						
34	Update the Incentive Zoning (IZ) requirements in the Land Use Code (LUC) code to create consistent citywide incentive zoning rules. This would be a broad review and update to the IZ requirements in the land use code; actions 35 - 38 could be considered as part of the larger review and update.	SDCI, OPCD		4Q 2017	5,7,8	Updates to existing code will be performed by SDCI, However OPCD is responsible for coordinating with SDCI staff to ensure future code changes are using consistent code language/terminology to support implementation.
35	Consider an alternative method for annual adjustments to payment fees (consider local and regional construction costs instead of or in addition to the Consumer Price index)	OH/SDCI		4Q 2017	22	
36	Clarify if code changes are needed for methods used to calculate affordable housing payment requirements, changes to the timing of payments in the review process and other procedural changes related to IZ and MHA	OH/SDCI		4Q 2017	5,8	
37	Consider code or process changes to require that IZ or MHA payments are submitted directly to FAS	OH/SDCI		4Q 2017	12	