communication will continue until a consensus is achieved or a staff report is sent to the Planning Board, - keep in mind that the Planning Director expects consensus!

◆***Communicating revisions:***
Any major changes negotiated by the packager with the applicant should be communicated back to the other relevant divisions. If this is not possible due to time constraints, the changes must be highlighted in the staff report.

◆***Staff report without consensus:***
In situations where the packager knows that there is not a consensus among staff and the project is to be presented at a Planning Board meeting, a draft staff report should be completed, if possible, by noon on the Monday of the week prior to the Planning Board meeting and immediately delivered to the other divisions. The staff report should discuss the non-packager view(s) and opinions and explain why the packager has chosen to recommend a particular course of action. Memos and other supporting information expressing the non-packager position should be included in the staff report at the discretion of the packager.

◆***Resolving recommendation disputes:***
If a non-packaging staff member believes that a recommendation in the staff report is inappropriate or that the report does not adequately address the non-packager viewpoint, the staff member should take the issue to his/her chief, who will then involve the packaging division chief in the discussions. If the chiefs cannot resolve the dispute, they will call in the deputy director or director to resolve the dispute. In unusual situations, the deputy director or director may permit the non-packager division staff to submit a written report of their recommendation, which the packager is obligated to attach to the staff recommendation. In the report to the Planning Board, the packager will discuss the conflicting viewpoints and explain why the packager has chosen to recommend that particular course of action. Staff representing the dissenting view should be present at the Planning Board meeting and be prepared to comment, if asked.

◆ ***Presenting the departmental position:***
In discussions with the community or when responding to questions from the Planning Board, staff members may, of course, present their own views. However, when these views are contrary to those of the staff report, the staff member must make it clear that he/she is not representing the departmental position.

◆***Graphics for reports and presentations:***
The non-packager division is responsible for the preparation of any graphic material which it wishes to have included in the staff report or presented at a public meeting.

Prepared by

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Office of the Planning Director

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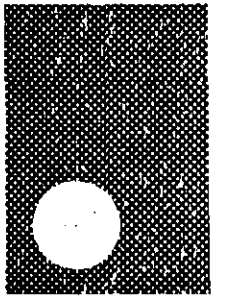
These Guidelines

are designed to

strengthen the role

of the packager



PACKAGER PROTOCOL

and

enable staff

to develop an

independent,

objective viewpoint

DEFINITION OF PACKAGER:

a staff person designated to lead a project that involves other divisions. The packager is required to draw appropriately on the services of staff in other divisions. These services not only bring appropriate specialized analysis but also bring with them perspectives which differ from that of the packager. The packager is responsible for (a) delivering the work projects on time, (b) reaching out to obtain the necessary services from other divisions, and (c) properly integrating and evaluating the different perspectives which naturally come with them.

THE JOB OF A PACKAGER:

(1) To develop a technically sound unified staff position through thorough evaluation of the alternatives, negotiation, and compromise to present to the Planning Board. This is an important goal and should be achieved in nearly every case. (2) To develop a recommendation to the Planning Board based on a thorough and fair analysis of competing viewpoints when a unified staff position is not achievable. In those instances, the report presented to the Planning Board should include not only the packager recommendation but also a discussion of the other opinions so that the Planning Board members can analyze the issues and arrive at their own conclusions.

PRINCIPLES

◆ Input from all staff members assigned to work on the project should be carefully considered.

◆ All staff should deal with each other openly and honestly and practice a collegial approach to packaging staff reports.

◆ All staff should make a significant commitment to meet deadlines.

PROCEDURES

◆***Types of projects to be packaged:***
Master Plan issues and regulatory items (preliminary plans, site plans, project plans, development plans, supplementary plans, special exceptions, text amendments, local amendments, mandatory referrals, etc.) should be referred to other relevant divisions for review as soon as possible after submission. Other documents such as reviews of project planning studies, letters, information requests, legislation, Water and Sewer Plan amendments, etc., will also follow this process when there are inter-divisional issues.

◆***Transmittal to other divisions.***
The transmittal should indicate the nature of the desired review, deadline for comments, the format of the comments (free-standing memo, component of report being prepared by packager, etc.), and the forum for gathering comments (Subdivision Review Committee meeting, staff meeting, report to Planning Board, etc.).

◆***Setting response deadlines:***
The deadline for submitting comments should be established consistent with the review process involved and should allow time for discussion prior to the final meeting or report, especially if conflicting opinions are anticipated.

◆***Meeting response deadlines:***
Non-packager divisions are expected to reply by the stated deadline even if they have no comments. The packager will attempt to follow up if no response is received by the deadline date. If the packager is unable to follow up in the time available, he/she may assume that no response means no comment. The packager is responsible for notifying other divisions when deadlines change, including extensions.

◆***Response format:***
Non-packager divisions should respond in writing but may respond orally if there are no major comments. Responses should be hand-delivered when a quick turnaround is critical. When possible, comments should be arrayed in priority to indicate which elements are critical, in the view of the commenting division, and which are only suggestions.

◆***Response content:***
Each division should focus on its area of expertise but it may comment on related issues that seem appropriate. The response is assumed to represent the position of the non-packager division and should be signed by either the chief or an appropriate coordinator. The response should take into consideration the nature and stage of the review process and provide appropriate comments for that type of review.

◆***Developing comments and recommendations:***
Staff are expected to develop informed, independent findings. Staff are encouraged to meet with staff from other agencies, citizens, applicant, etc., to attempt to understand issues and develop objective professional judgment. However, staff are not obligated to meet jointly with opposing citizen groups or jointly with citizens and the applicant.

◆***Synthesizing recommendations:***
Once the packager receives comments from the other divisions, he/she should review them as quickly as possible to determine if a consistent set of recommendations can be developed. If there do not appear to be any major conflicts, no further discussions are necessary. If there are possible substantive conflicts, the packager will set up a meeting with the staff of the relevant divisions to discuss the conflicting views. This