

TECHNICAL MEMO

Date: October 13, 2017
Rev. December 14, 2017

To: John Matusik, P.E., LEED AP
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Fairfax County Department of Land Development Services (LDS)

CC: William J. Meyer, Jr., P.E. BCEE

From: Kenneth Eyre, P.E., Greeley and Hansen

Subject: Task Order #29 - Task 2 - Existing State of the Fairfax County PFM

Background

The County's Public Facilities Manual (PFM) sets forth the guidelines and standards which govern the design of public facilities constructed to serve new development such as waterlines, sanitary sewers, streets and parking, sidewalks and trails, landscaping features, and erosion and sediment controls. The PFM serves as a technical manual implementing the requirements of the Subdivision Ordinance (Chapter 101) and Zoning Ordinance (Chapter 112), and other applicable chapters of the *Code of the County of Fairfax, Virginia* (County Code). The PFM is subject to periodic revisions upon action by the Fairfax County Board of Supervisors. Fairfax County is conducting an overall evaluation of the County's PFM to examine its use and application.

The PFM evaluation effort, referenced as the PFM Flexibility Project, is the result of a *Fairfax First* initiative to "improve the speed, consistency, and predictability of the Land Development Review Process." Further, the Fairfax County Board of Supervisors' *Strategic Plan to Facilitate the Economic Success of Fairfax County* (2015) states, "The Public Facilities Manual (PFM) should be a design guide that is consistent and meets the language of the law while providing flexibility for engineering judgment, particularly with regard to new technology and new development situations." The PFM Flexibility Project's efforts to add flexibility and clarity to the PFM is in direct response to the goals outlined in the *Fairfax First* initiative and the *Strategic Plan*.

The term flexibility as used in this context refers to:

- Modifying text to respond to altered circumstances or conditions; allowing alternative designs that meet the intent.
- Adding the qualities of agility, ease of use and consistency to the PFM.
- Ensuring relevance to respond to evolving and urbanizing development patterns.
- Applying targeted flexibility dependent on each provision and the engineering judgment of subject matter experts.

The information in this existing state report, along with the companion report "Existing State of the PFM Municipal Survey Results," will be used to develop what the future state of the PFM should look like, and what is necessary to get there. Greeley and Hansen will take these existing state conditions into

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consideration when determining the future state of the PFM. The future state of the PFM will also be based on the prioritized PFM annotations, feedback compiled from a Technical Advisory Committee (TAC) workshop, and several stakeholder meetings. Additionally, Greeley and Hansen will develop a “roadmap” to establish how to get from the existing state to the future state of the PFM.

Purpose

The purpose of this memorandum is to:

- Identify the different stakeholders and processes involved in the determination of the existing state of the PFM.
- Summarize the feedback obtained from the stakeholders on the PFM’s existing state by identifying the five major themes to be achieved.
- Present an overview of the PFM chapter annotations to identify editor comments that impact engineering standards and to inform the existing state characterization of the PFM.

It is not the intent of this memorandum to review and assess the engineering plates or examine all the provided PFM Chapter annotations.

Municipal Survey

Part of the assessment of the existing state of the PFM includes information collected from other comparable municipalities to gain a general understanding of their land development design requirements and processes. This benchmarking data was then compared with Fairfax County’s land development requirements and processes to determine where improvements could be implemented to improve the speed, consistency, and predictability of the land development review process. The County sent a seven-question survey to ten municipalities. The County received seven responses.

Details of the survey questions and responses are in a separate report titled, “Existing State of the PFM Municipal Survey Results” (Attachment A).

Stakeholder Engagement Process

In addition to the municipal survey, feedback information for the existing state assessment was obtained from several stakeholder committees, a public outreach effort, and workshops (see Attachment C for a list of all committee members). This stakeholder engagement process included:

- External stakeholder committee – Diverse industry professionals as subject matter experts to offer insight on the current and future state of the PFM.
- County advisory committees – Policy, Innovative, Steering and Technical.
- Industry Partners – The Engineer Standards Review Committee (ESRC), Northern Virginia Builders Association, NAIOP, and the Engineers and Surveyors Institute (ESI).
- Additional County Outreach – Land Use Aides, Site Development and Inspections Division Tech Forum & Inspectors, Building Division, Customer and Technical Support Center, and the Fairfax First Blog.
- Public Outreach – Feedback forms, meeting minutes, PowerPoints all available on the PFM website; Zoning Ordinance Modification Citizen Advisory Group, Land Use Attorneys Advisory Group; a future PFM Flex Project website (December, 2017).

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A county advisory committee workshop and an external stakeholder committee meeting were specifically designed to solicit feedback from internal staff and external industry representatives through a round table discussion on specific topics related to the assessment of the existing state of the PFM (Attachments F and G).

The presentations delivered to industry partners and non-committee County staff offered insight into the progress of the PFM Flexibility Project, as well as an opportunity to ask questions and find out how to engage the development community in the project (Attachments D and E).

The public outreach effort allowed the public to offer comments via the feedback form, the PFM Flex Project email address, or the advisory groups, and kept them apprised of the progress of the project (Attachment H).

Flexibility Themes

The information gathered through the stakeholder engagement process and the municipal survey resulted in five “Flexibility” themes (Attachment B). The following is a description of these themes:

- **Clear:** Easy to perceive, understand, or interpret; leaving no doubt; obvious or unambiguous.
- **Interactive:** Involving the actions or input of a user; user-friendly.
- **Adaptable:** Able to adjust to new conditions; able to be modified for a new use or purpose; capable of being or becoming adapted.
- **Urban:** Creating a unified approach to developing and re-developing County districts and areas to meet urban standards and practices.
- **Innovative:** Incorporating standards that reflect developing technology; unifying agendas with the Zoning Ordinance and the Comprehensive Plan.

Examples of recommendations from internal and external stakeholders for the five themes include:

- **Clear:**
 - Add tables/diagrams to simplify complex information.
 - Add indented outline formatting.
 - Update outdated cover art.
 - Update/remove the index.
 - Remove outdated/extraneous text and redundancies; remove outdated provisions and plates.
- **Interactive:**
 - Add applicability section; update foreword/introduction.
 - Update definitions and move into first section.
 - Add internal and external hyperlinks.
 - Incorporate information by reference to other codes as the source of regulation (VDOT, ZO, subdivision ordinance, CBPO, etc.).

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- **Adaptable:**
 - Minimize mandatory requirements by selectively changing “shall” to “should,” where appropriate
 - Allow LDS Director to waive/modify “shall,” in unusual cases; Allow LDS Director to add to or update non-technical provisions and plates that do not require legislative action.
 - Expand use of alternatives to “normal” design standards.
- **Urban:**
 - Eliminate the need for Service Drive Waivers in areas where design guidelines do not call for a service drive.
 - Update the PFM to align with VDOT standards, such as the urban design guidelines and multimodal standards.
 - Consistency between VDOT Road Design Manual and PFM.
- **Innovative:**
 - Allow for innovative practices.
 - Allow the use of emerging technology to address specific challenges in land development.
 - Expand the use of urban standards and practices, and be consistent with the Board endorsed guidelines in CRAs/CRDs; consider how to allow them in the rest of the County.

The Technical Advisory Committee

To aid in the assessment of the existing state of the PFM, the County assembled a Technical Advisory Committee (TAC), consisting of County staff considered to be subject matter experts (SME), to review and annotate each chapter of the PFM to identify areas that could be revised to incorporate flexibility and clarity.

An initial meeting with TAC members included discussion of the objectives for annotating chapters. The TAC members were tasked with annotating their respective chapters, by:

- Confirming relevant PFM sections in need of analysis.
- Calling-out sections of the PFM where modification of the provisions may be allowed.
- Identifying areas to add clarity, such as:
 - Revising text to use the clearest words possible.
 - Removing outdated provisions.
 - Adding tables to simplify complicated information.
 - Deleting unnecessary plates and drawings.
 - Incorporating information by reference and links to other sources.
 - Updating definitions and the index.

TAC members developed full editorial annotations for each PFM chapter. Each chapter annotation falls within one of the five main PFM themes of clarity, interactivity, adaptability, urbanization, and innovation resulting in annotations consistent with the effort to make the PFM a more flexible guidelines document.

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Full editorial PFM chapter annotations provided to Greeley and Hansen Consultant include:

- Chapter 2 – General Subdivision & Site Plan Information
- Chapter 7 – Streets, Parking & Driveways
- Chapter 8 – Sidewalks, Trails & Recreation
- Chapter 10 – Sewage and Solid Waste Disposal
- Chapter 11 – Erosion and Sediment Control
- Section 12 – Tree Conservation

Assessment of the PFM chapter annotations provided insight regarding the extent of the TAC revision suggestions. The TAC revision suggestions included the following:

- | | |
|-----------------------------------|--|
| ✓ Add Provisions/Tables/Plates | ✓ Consolidate Redundant Text |
| ✓ Modify Provisions/Tables/Plates | ✓ Update Outdated Text |
| ✓ Delete Provisions/Tables/Plates | ✓ Move Provisions to another PFM chapter |
| ✓ Clarify Complex Provisions | ✓ Change “shall” to “should/must/may/will” |
| ✓ Revise for Accuracy | ✓ Areas where Further Research is Required |

Each annotation will be prioritized in a series of meetings involving the TAC teams and the PFM Flex Project core team to determine which annotations will be categorized as Priority 1 or Priority 2.

- Priority 1 annotations are those mostly relating to non-technical changes, i.e., those that will not require extensive research and industry vetting.
- Priority 1 annotations will be included with the PFM Flex Project.
- Priority 2 annotations are those requiring extensive research and industry vetting.
- Priority 2 annotations will be considered in future PFM amendments.

Conclusion

The PFM existing state characterization highlights the processes and resources necessary in the assessment and revision of the PFM. Further, the existing state characterization identifies recommendations of where the PFM could use improvement, and recognizes themes under which these recommendations belong. The information gathered from this existing state characterization will be used for the gap analysis to determine the future state of the PFM.

For a full record of documents used in the assessment of the existing state refer to the Attachments.

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Attachments

- A) Existing State of the PFM Municipal Survey Results
- B) PFM Themes Handout
- C) Stakeholder Committee Members List
- D) PowerPoint: An Update on Adding Flexibility to Fairfax County’s PFM
- E) PowerPoint: Adding Clarity and Interactivity to Fairfax County’s Public Facilities Manual (PFM)
- F) Workshop #1—TAC Workshop Responses Categorized
- G) Stakeholder Committee Meeting Minutes from May 25, 2017
- H) [PFM Website](#)