

# ZONING PRACTICE

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## Creating Staff Reports With Pizzaz

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# Creating Staff Reports With Pizzaz

**By Bonnie J. Johnson, FAICP, PhD, and  
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Staff reports assess proposals set before an elected or appointed governing board charged with looking out for the present and future of communities, including the land, nature, and humans. The scope of the proposal might be anything from small changes on a single parcel of land to a grand plan or policy affecting the entire jurisdiction or region.

Each staff report is an opportunity to think about our connections with other people and nature and a chance to give thanks for the very land beneath us. Staff reports can help us appreciate what we have and how to best work together for the general health, safety, and welfare of our ecosystem. How do we unleash the power of staff reports? Creativity.

During a 2017 session on staff reports at the National Planning Conference, a standing-room-only crowd of planners was asked, “What one word do you think of when you hear ‘staff report’?” The resulting word cloud shows an area of planning practice ripe for change and ready for creative energy, not only for the sake of communities, but also for the sake of planners themselves ([Figure 1](#)).

This issue of *Zoning Practice* brings creativity to the staff report by drawing on research about how to foster creative work within organizations. For staff reports, we describe and use two different exercises based on proven creativity-training programs (Amabile 1996). We offer these two creative thinking skills processes to assist planners in finding their way to what is most valuable for their communities and making the most of their technical and empathetic expertise.

# What one word do you think of when you hear "staff report"?



Figure 1. Staff report word cloud (Credit: Mentimeter)

# FIT FOR PURPOSE: CREATIVITY

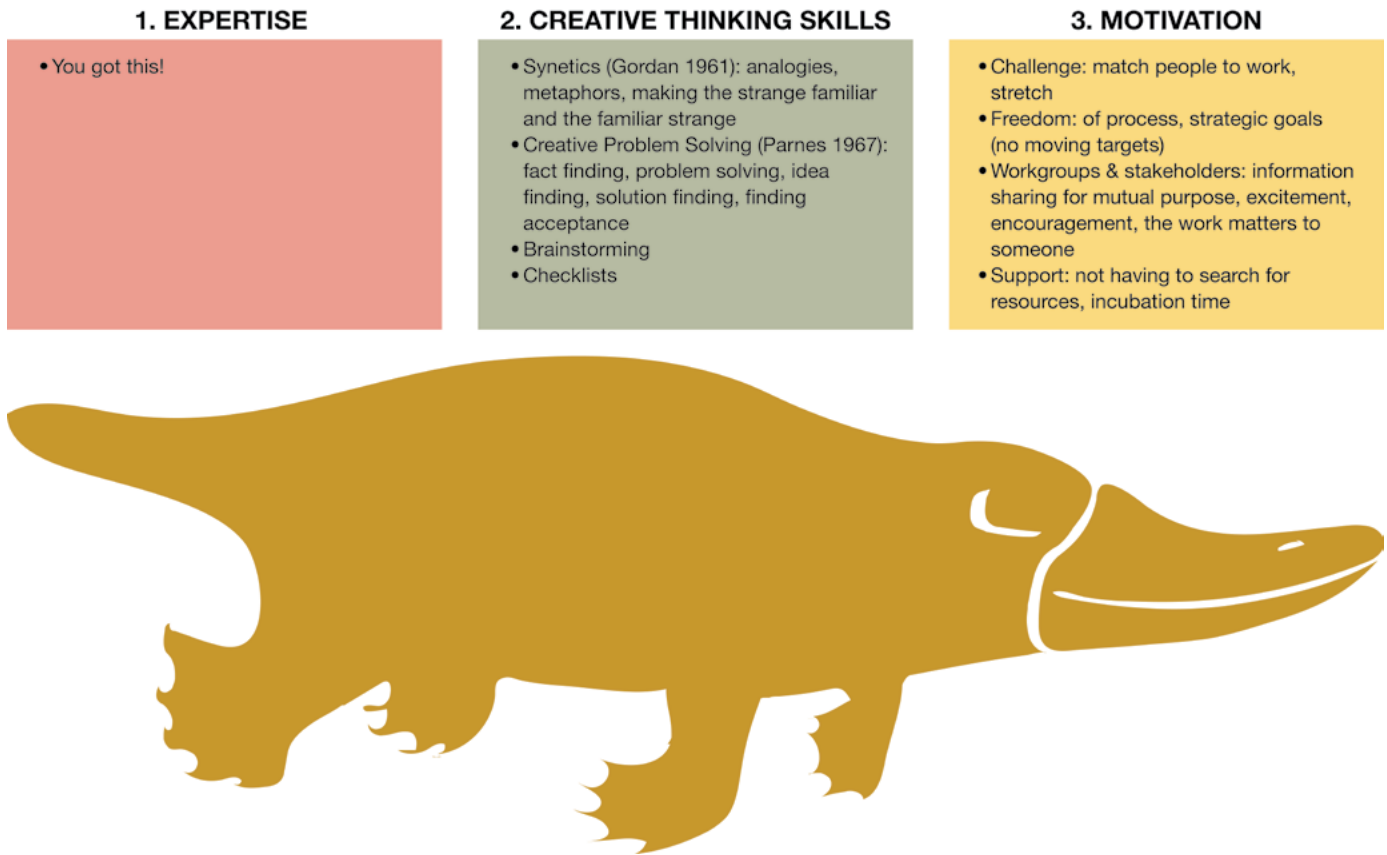


Figure 2. The three components of creativity and creativity boosters (Amabile 1996, 1998; Hartley 2005; Harrison et al. 2022) (Credit: American Planning Association)

## Creativity in Organizations

The three components of creativity are *expertise*, *creative-thinking skills*, and *motivation* (Figure 2) (Amabile 1998; Harrison, Rouse, Fisher, and Amabile 2022). We focus on the second component, developing creative-thinking skills.

[Please note that the platypus is an unofficial mascot of planners. They have “plat” in their names. They are an unusual combination of other animals—the beaver, duck, and otter—just as planners are an unusual combination of other professions—engineering, architecture, and social welfare. Platypuses have fur *and* can lay eggs, can go underwater *and* on land, and have a sixth sense in their bills whereby they locate the electric fields of organisms. Aboriginal peoples relate a dreaming story whereby the platypus is asked by the birds, marsupials, and fish

to join their families. The platypus politely declines saying they want to be friends with each of the groups instead of joining one (Bino et al. 2019).]

The study of creativity in organizations started with examining creativity as an outcome but evolved to understand creative work as a process (Harrison et al. 2022). It is a “process in which ideas are generated, elaborated, evaluated, stored, discarded, or implemented into a product by individuals or groups . . . with the intention of producing novel and useful ideas” (Rouse and Harrison 2022). Planners will note that this process sounds very similar to the rational planning model (generating ideas, evaluating consequences, making a choice, implementing the choice, and evaluating the choice).

Creativity scholars find that creativity is easy to kill, particularly in organizations

that involve “systematic processes or legal regulations” (Amabile 1998). It can fall victim to work environments and managers that emphasize, “for entirely good reasons...coordination, productivity, and control” (Amabile 1998). More than likely, these descriptions hit home for many planners. Other creativity killers demotivate people, including impending evaluations, work surveillance, extra pay seen as a means of control rather than as a reward for good work, time spent looking for resources, fear of failure or appearing foolish, and competition (Amabile 2019).

There are numerous myths about creative thinking, such as, not everyone can do it, it only occurs during crises, or it is something rare resulting in extremely original ideas (Amabile 1998; Amabile, Hadley, & Kramer 2002; Harrison & Rouse 2015). We are here to confirm that these are indeed myths. Innovation can be something completely new, but also, it can be a reinvention, adaption, or technique borrowed from another time, place, or setting (Hartley 2005). We emphasize an orientation toward fit for purpose and

the joy inducing motivational rewards of simply attempting creative work (no matter the results—no pressure). The most commonly recognized creative work concerns products, and thus, we propose planners start with their most pervasive product, the staff report. We begin with a product, but do not be surprised if some side benefits of creative work are innovations in relationships, service provision, processes, roles, strategies, governance structures, or language (Hartley 2005).

### Synectics Exercises

Synectics builds creative thinking skills by making “the strange familiar” and “the familiar strange” (Gordon 1961). It includes data collection, analysis, and evaluation then interrupts old associations through the use of analogies and metaphors (Gendrop 1996). Planners can apply Synectics to staff reports by making style boards for data collection, mood boards for analysis and communication, and avant-garde staff reports to disrupt old associations.

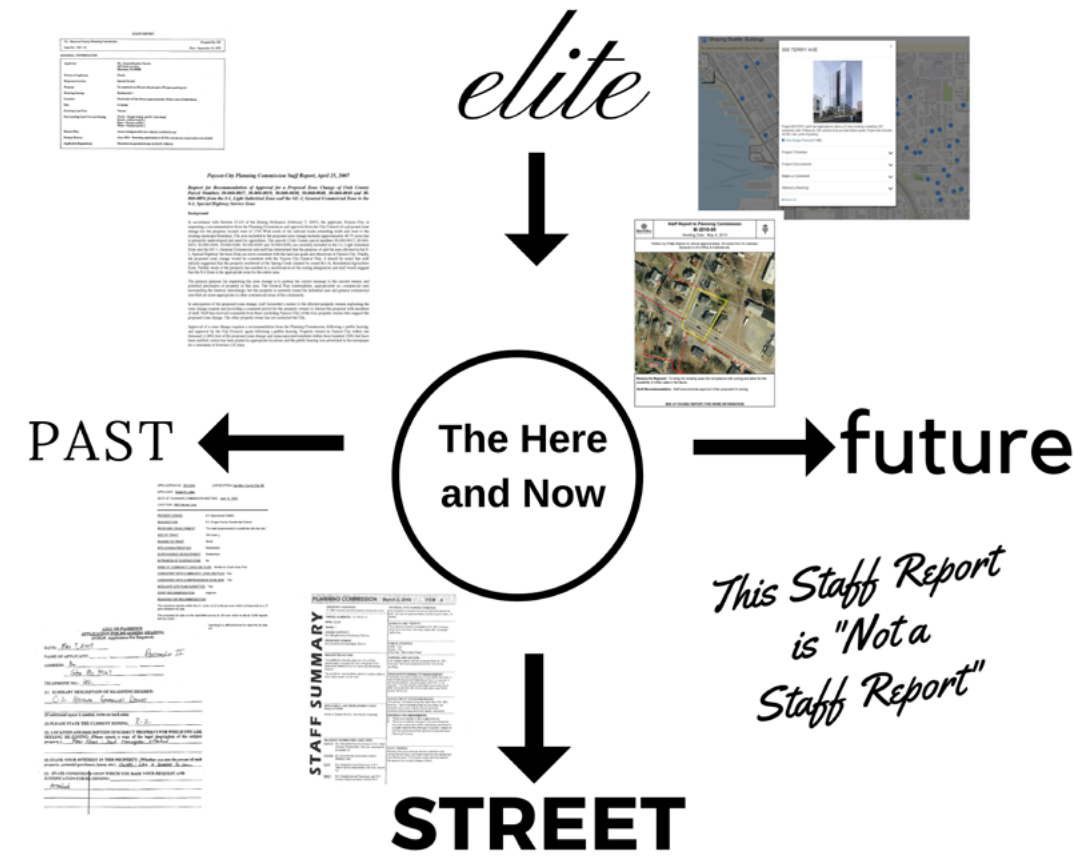


Figure 3. Style board of staff reports and fashion thinking (Credit: Bonnie Johnson)

### Make a Style Board

A style board is a collection of images of different products that are out on the market (McDonagh and Denton 2005). This is a type of brainstorming, and brainstorming is a tried-and-true method of boosting creative thinking (Amabile 1996). Product designers use style boards to see what their competition is and gain insights. For example, when examining different styles, fashion designers take inspiration from the past, what they see people wearing on the street, what their elite clients (major stakeholders) might like, and what they envision the future being (Nixon and Blakley 2012). Look around and collect some staff reports. [Figure 3](#) shows a style board where staff reports are placed within the context of “fashion thinking.”

Here are some good ideas we spotted by looking at existing staff reports:

- Put a map on the cover sheet.
- Summarize the most important issues right away.
- Use checklists, bullet points, tables, and side bars to highlight information.
- Share research.
- Use photos to show surroundings or to illustrate options.
- Use aerials over time to show the history of a site.
- Put the recommendation and suggested motion on the first page.

### Make a Mood Board

Mood boards are made from graphics, textures, photos, and even smells that are compiled on a board or poster to create a certain ambiance. It boosts new thinking and gets things out of people’s heads, making them accessible to others for discussion and understanding (Cassidy 2011; McDonagh and Storer 2004). Have each planner in the office make one about what they want to be able to do with staff reports and then share.

Visit a local art show, gallery, museum, or open some art books for ideas, like mobiles for balance, collages for layering information, or sculpture for using symbols to efficiently convey complex ideas and emotions from different angles.

[Figure 4](#) is a mood board inspired by mobiles that require balance. How many times are planners urged to balance



*Figure 4. Mobile staff report mood board, incorporating the works of art by Katie Baldwin (“Paper Chain” 2014) and an unrecorded Lenape (Delaware) artist (early 1900s) from the Spencer Museum of Art in Lawrence, Kansas (Credit: Bonnie Johnson)*

competing values or balance economy, ecology, and equity? Mobiles move and change mimicking different perspectives. The spiral in the mood board is similar to taking a lot of information and then homing in on a decision. The mobiles are also reminiscent of clothes lines—as in, yes, we might air some dirty laundry, but there are no secrets in the public sector.

### Make an Avant-Garde Staff Report

The avant-garde art movement said to everyone, “Yes, you can be an artist too!” It freed people to take whatever was at hand and create something that conveyed their thoughts and feelings (Jagodzinski 2013). For example, they started making collages out of found objects. In a way, art is a means of conducting research and producing new knowledge (Orr and Wadud 2019). *Avant-garde* also means the *vanguard* or those out front taking the lead. Staff reports should lead the way.

To continue our analogy to the fashion world, fashion designers will make avant-garde clothes that are over the top and sometimes even hard to wear or walk in, but they do it to spark ideas for “accessible clothes.” Start with an actual rezoning or other application from the past; then



*Figure 5. A mobile as an example of an avant-garde staff report (Credit: Bonnie Johnson)*

see what sort of avant-garde staff report you can make. Mimic a work of art or gather recyclables, office supplies, string, tape, or other materials and see if you can convey your analysis and recommendations using only the items at hand.

An example of an avant-garde staff report based on art is shown in [Figure 5](#). Making a mobile is harder than it looks. The mobile staff report had to balance so the different aspects of the report had to really and truly balance.

The mobile avant-garde staff report starts at the top with a particular proposal and some choices: the past, the present, the applicant's proposed future, the comprehensive plan's proposed future, or some other future. As one moves down the mobile, there is the balancing of values (what would be found in a community's plans). They are shown as symbols. As those are balanced, the decision filters down through democratic values of accountability, efficiency, effectiveness, social equity, diversity, and justice (Nalbandian 2002), and then the decision point is represented by the scales at the bottom.

Simplifying an application into images and symbols for the mobile staff report

focused attention on what actually was at stake. Does this application literally balance? Is the resulting decision just? How easy is it to apply the community's plan? Perhaps plans should start with staff reports in mind: How will these policies and goals be used day-to-day? Can we develop criteria in plans that become illustrations, tables, or infographics in staff reports?

### **Evaluate as You Go Along**

The Synectics exercises should jump start feelings of wonder and excitement. Part of getting the most out of creative skills exercises is to incubate ideas through one's own thinking, but then sharing and discussing with others. Style boards, mood boards, and the avant-garde staff reports are easy to share. Do the avant-garde staff report exercise with staff, and then share with planning commissions or other governing boards.

Try sharing via the "Temperature Taking Technique" which is adapted from an activity called "The Temperature Reading" from the book *Say It Straight* (Englander-Golden and Satir 1990). The original exercise helps groups of people work together and express things that might go

unspoken. Here are some modified examples of questions to ask commissioners and council members about staff reports and avant-garde staff reports:

- Think about the staff reports you usually read; what do you like or appreciate about them?
- Think about the style board, mood board, and avant-garde staff reports you looked at before the meeting; what new information about staff reports do you now have that no one else has?
- Do you have any worries or concerns about the staff reports you read? Do you have any solutions for change?
- How do you use staff reports in your decision-making, and could that change if staff reports changed?
- How should staff reports be made available (paper, podcast, video, online, poster, etc.)?
- What are your hopes and wishes for future staff reports?

The first question evokes a pleasant response, then the person is asked for “new information” or something that no one else knows, making them the expert. The next question asks for the person to describe any concerns but with solutions in mind. This helps the person realize how

hard solutions are, but, often times, individuals are the only ones who know what they prefer. At the end is a question about hope and wishes so that the facilitation ends on a high note.

Such sharing was done with a variety of commissions across the country using the Temperature Taking Technique. The resulting discussions with actual commissions helped staff understand what was working and what was not working. The main request of the commissioners was to have a better look at what goes on behind the scenes. What happens inside the black box? They wanted to know the stories of change and to understand thought processes. The side benefits of the exercise were affirming the good work planning staff were already doing and helping the commissioners feel comfortable asking questions about processes that, quite frankly, staff thought commissioners already understood but did not.

## Creative Problem Solving

Instead of making the usual unusual, the Creative Problem Solving training system (Parnes 1967) promotes creative thinking skills through brainstorming and checklists to take what’s old and make it new again (Amabile 1996). Staff members in Lenexa,


 <b>Report to the Planning Commission</b>	
<b>MEETING DATE:</b> January 3, 2022 <b>CONSENT AGENDA ITEM:</b> 3 & 4 <b>PROJECT TITLE:</b> Meritex Lenexa Executive Park Surface Second and Third Plat <b>PROJECT # / REQUEST:</b> PT22-01F – Final Plat PT22-02F – Final Plat	
<b>APPLICANT:</b> Mark Roseman, Meritex	<b>OWNER:</b> Meritex Lenexa Development LLC  <b>STAFF PLANNER:</b> Christa McGaha
<b>PROPERTY LOCATION:</b> Located approximately at 99 <sup>th</sup> Street and Britton Street	
<b>SUMMARY OF RECOMMENDATION</b>  Staff recommends <b>APPROVAL</b> of the final plat for Meritex Lenexa Executive Park Surface, Second Plat.  Staff recommends <b>APPROVAL</b> of the final plat for Meritex Lenexa Executive Park Surface, Third Plat.	
<b>PROPOSED PROJECT DESCRIPTION AND BACKGROUND INFORMATION</b>  The applicant is requesting approval of two, one-lot subdivision plats for the Meritex Lenexa Executive Surface Business Park. The rezoning and preliminary plans for buildings 3, 4 and 5 of this business park were approved in November 2021. This business park is being developed on the surface above the Meritex underground facility.	
<b>CURRENT ZONING:</b> BP-2, Planned Manufacturing District	<b>PROPOSED USE:</b> Warehouse
<b>ACREAGE:</b> Second Plat: 14.4 acres (Buildings 4 and 5) Third Plat: 27.9 acres (Building 3)	
<b>COMPREHENSIVE PLAN RECOMMENDATION FOR AREA</b>  <b>Business Park:</b> Developments providing space for uses that may include light assembly and manufacturing or warehousing and distribution. Settings may range from campus-like business parks to single-use buildings.	
<b>VICINITY ZONING PATTERN:</b> <b>North:</b> BP-2, Planned Manufacturing District  <b>South:</b> AG, Agricultural District <b>East:</b> AG, Agricultural District and BP-1, Planned Business Park District <b>West:</b> CP-3, Planned Regional Commercial District	<b>VICINITY LAND USE PATTERN:</b> <b>North:</b> Warehouse distribution/storage facility, Meritex Surface Buildings 1 and 2, subsurface uses include underground storage and light manufacturing <b>South:</b> Undeveloped land, subsurface uses include underground storage and light manufacturing <b>East:</b> Undeveloped land, subsurface uses include underground storage and light manufacturing <b>West:</b> Undeveloped land
<b>FINAL PLAT ANALYSIS, MERITEX LENEXA EXECUTIVE PARK SURFACE, SECOND PLAT</b>  The application is for a one-lot plat for a business park development. The property is a 27.9-acre tract of land that fronts on 99 <sup>th</sup> Street at the intersection of Britton Road. Lot 1 of Meritex Lenexa Executive Park is directly to the north and all other surrounding land is currently unplatted.  The northern property line along 99 <sup>th</sup> Street shows limits of no access except for the locations of the two access points onto the property.  The plat will include two separate drainage easements for stormwater BMPs at the southeast and west corners of the site. No other easements or right-of-way are dedicated with this plat.	
<b>INFORMATIONAL COMMENTS</b>  The Governing Body will consider acceptance of drainage easements, as shown on the final plat, on January 18, 2022.	
<b>STAFF RECOMMENDATION</b>  Staff recommends <b>APPROVAL</b> of the final plat for Meritex Lenexa Executive Park Surface, Second Plat located at 99 <sup>th</sup> and Britton Street.	
<b>FINAL PLAT ANALYSIS, MERITEX LENEXA EXECUTIVE PARK SURFACE, THIRD PLAT</b>  The application is for a one-lot plat for a business park development. The property is a 14.4-acre tract of land that has frontage on 99 <sup>th</sup> Street. Lot 1 of Meritex Lenexa Executive Park is directly to the east and Lot 1 of Viracor Final Plat is to the west. To the north is the entrance to the Meritex underground as well as the entrance to the National Archives. Overall, the Meritex Business Park is centrally located	

Figure 6. Sample pages from a staff report to the Lenexa Planning Commission from January 2022 (Credit: City of Lenexa)

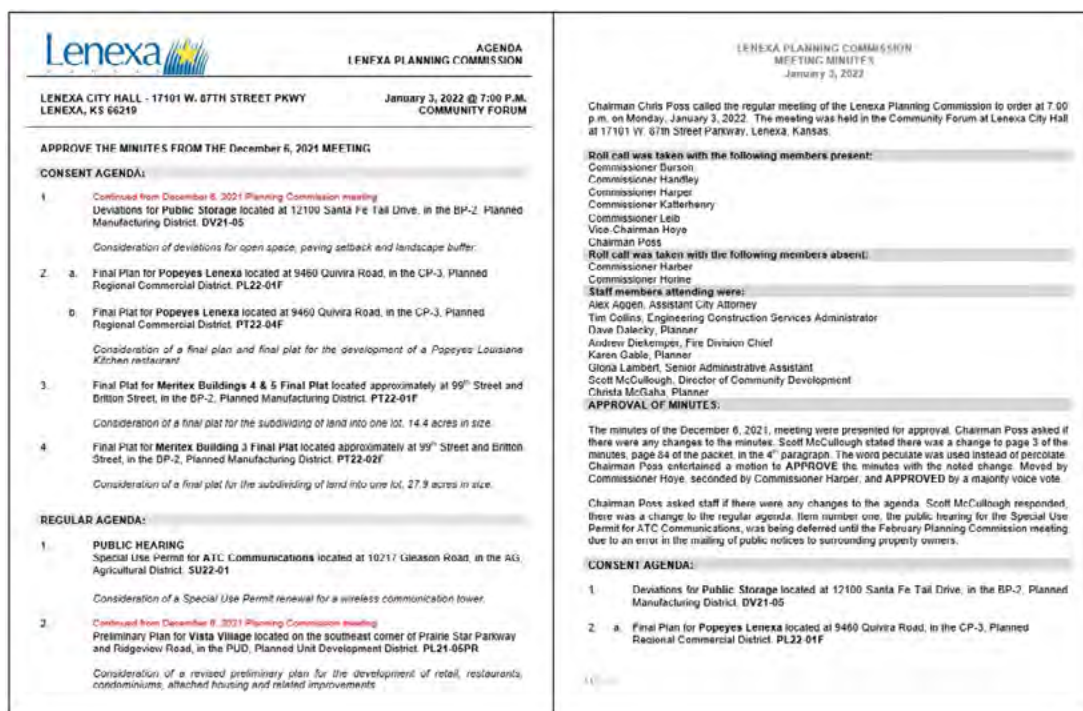


Figure 7. Sample pages from the Lenexa Planning Commission agenda and minutes from January 2022 (Credit: City of Lenexa)

Kansas, used a Creative Problem Solving exercise to rethink their staff reports. Here are the steps they followed and their results to guide you through creating and implementing improvements to your staff reports.

### Diagnose Your Current Staff Reports

Lenexa created a staff report content checklist (based on the Staff Report Evaluation Tool, Johnson and Lyles 2016) to review what was in their staff reports today and to think about what they wanted to add (see [Appendix](#)).

Here are some important questions to think about:

- What is good, bad, ugly, unnecessary, missing, and helpful?
- Is it consistent with other reports that the municipality or county publishes, such as a city council report, and be honest, do those other reports also need to be upgraded?
- Does it look and feel like your jurisdiction's branding (e.g., logos, colors, and fonts)?

In Lenexa, reports are created in Microsoft Word and finalized as PDF files. The reports were informative but sometimes inconsistent in structure, and they looked

dated. The summary on the first page was helpful, and it was good to have a detailed section about the applicable information from the comprehensive plan. Exhibits and plans were provided as attachments to the report instead of being integrated directly within the report. When the project included multiple aspects (such as a plat with a plan and a special use permit), the recommendations for each aspect were in separate places in the report.

There were multiple staff report template files based on the type of project. The reports seldom included tables and graphics and appeared very text heavy ([Figure 6](#)). The formatting of the report had a similar look and feel to reports at the city council level. The planning commission agenda and minutes documents also appeared dated ([Figure 7](#)).

After your evaluation, don't forget to get other perspectives. Ask for staff report evaluations from other stakeholders too! Consider input from your coworkers, the planning commission, supervisors, the marketing/communications department, and external stakeholders, such as members of the public or developers, architects, or engineers that frequently submit applications for entitlements in your community.

Define your current and future

audience. Who are you writing the staff report for? The audience for Lenexa's planning commission staff reports covers a broad spectrum of groups, including the applicant, planning commissioners, city council members, the public, city staff, the media, and various members of the development community (e.g., developers, architects, engineers, contractors, professional associations, etc.). All of these groups needed to be considered when creating a new staff report template.

Evaluate Obstacles to Improvement

Ask yourself, "Who do I need to have support from in order to implement a change to my staff report?" Is it the planning manager, the community development director, the city manager, the planning commission, or someone else? Also ask yourself if your team—the other staff members that write or contribute to the reports—are on board with changes. Lenexa's planners ensured that their planning team, supervisor, the communications department, and the city manager's department were on board with making changes to the planning commission staff report. Planners kept everyone in the loop and ensured that they were able to review drafts and provide feedback as the

new template was developed.

What kind of software limitations do you have? Do you need to work with the current software, or do you have the ability (or requirement) to move the report into different software? What format is your planning commission meeting packet: paper or digital? Can you change this? In Lenexa, planners had to adapt the planning commission packet creation process to include agenda software called Civic-Clerk, while also making the report more creative. Not all software has the same capabilities, and some software can make creativity more cumbersome.

Make a Plan

Start by establishing goals for the new version of the staff report. Here are some potential aspects to consider:

- Improve readability.
- Modernize the look with branding.
- Provide more information with less text by using graphics, photos, and tables.
- Clarify process steps and important dates within the report.
- Simplify the report production process.

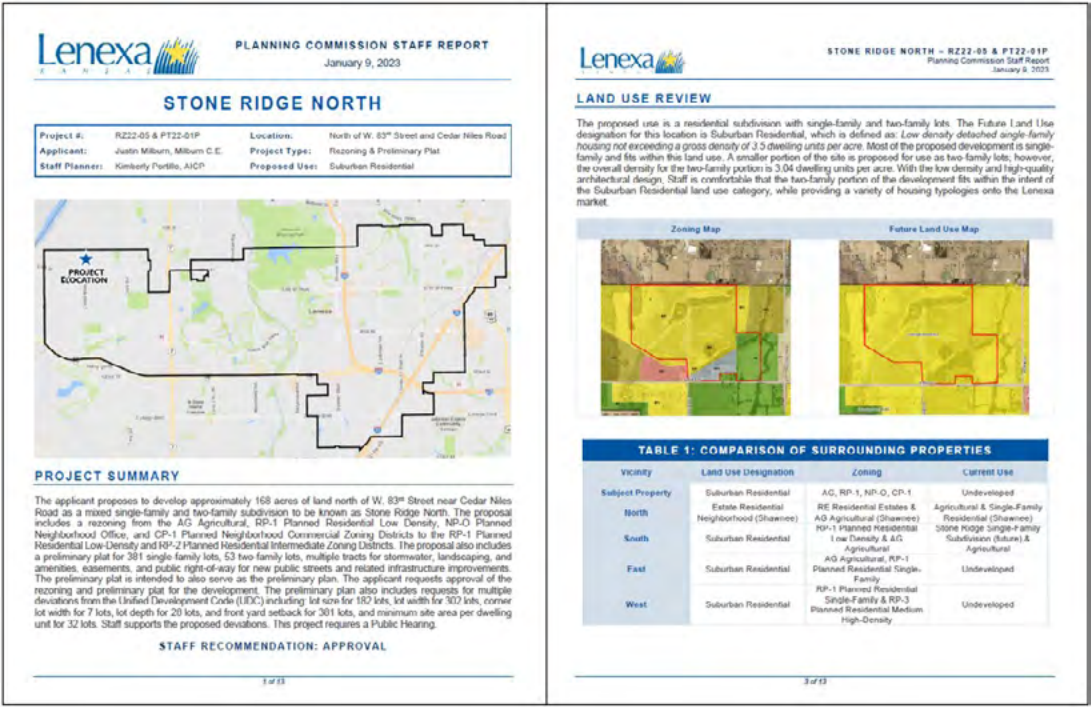


Figure 8. Sample pages from a staff report to the Lenexa Planning Commission from January 2023 (Credit: City of Lenexa)

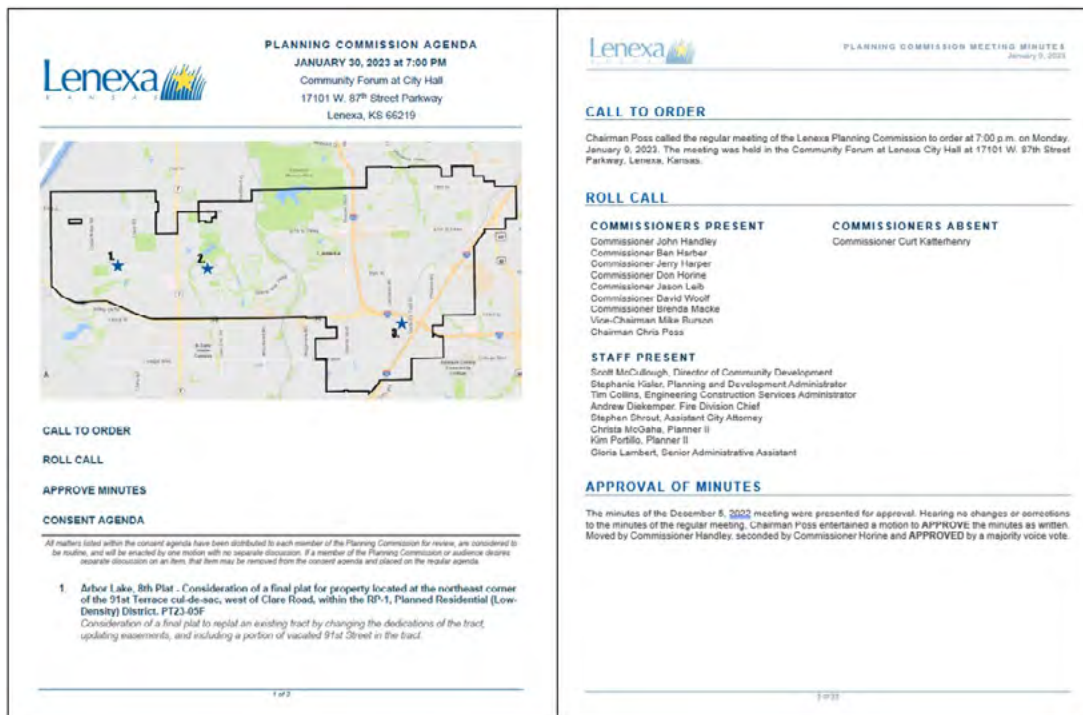


Figure 9. Sample pages from the Lenexa Planning Commission agenda and minutes from January 2023 (Credit: City of Lenexa)

- Establish timelines for drafting the template and instituting its use.
- Consider whether templates and processes for the planning commission agenda and minutes need updating (e.g., agenda management, packet creation, staff report collaboration methods, etc.).

Planners in Lenexa revamped the report template while also changing the way the meeting packet was generated. They made a list of the following goals and objectives for the new template and for the process of creating the packet:

- Create a single template to use for all staff reports to ensure consistency and make it easy to adapt in the future.
- Make the report look modern, with new formatting and consistent branding.
- Improve readability by adding more graphics, photos, tables, lists, and links and reducing large blocks of text.
- Add snippets of text to describe what information needs to be present in each section of the template.
- Add placeholder graphics and tables strategically within the template.
- Clarify standard information about next steps in the approval process.
- Provide a first page summary

that could be duplicated in a city council memo.

- Provide all recommendations at the very end of the report to make them easier to locate.
- Keep the staff report template in Word to preserve the ease of collaboration.
- Use a new working folder for final PDFs to be saved prior to creating the packet.
- Use CivicClerk software for agenda management instead of report drafting to allow for more creative flexibility in the staff report document.
- Update templates for the agenda and minutes to match the new staff report template.
- Get everything implemented for the first planning commission meeting in January 2023.

### Make It Happen

After thoughtful collaboration among the planners and other city departments, the planners completed new templates for planning commission staff reports, agendas, and minutes and improved the process for packet creation. The new templates and processes were fully implemented starting in January 2023 and have already been reviewed positively by stakeholders ([Figure 8](#); [Figure 9](#)).

The new format has appropriate

spacing, clean formatting within the documents, consistent sections of information, a set style for tables, directions for certain graphic elements, and room for all the relevant information about the project. The templates are all in Word and can easily be adapted when staff finds something that needs to be changed. Staff now uses software to create the agenda and packet but adds the projects on the agenda as line items, with reports and plans attached as PDF exhibits rather than created within the software.

The staff reports are longer because of all the graphics, photos, and tables, which help provide context and tell the story of the project. In some cases, you can get a good idea of the project just by glancing at the images in the report.

As a bonus, the PowerPoint presentation for the planning commission meeting is very simple because the graphics for the slides are already complete from the staff report!

## Connections

We focused on developing the creative thinking skills component of creativity and one ubiquitous product of planning, the staff report. We figure if you read *Zoning Practice*, you are already working on the foundational component of creativity, which is expertise. We think the exercises presented here will help with motivation (another basic component of creativity) and help planners see progress toward the goal of better planning practice.

Motivation is influenced by “the progress principle.” For organizations, managers should focus on enabling progress, even just small wins that “ignite joy, engagement, and creativity at work” (Amabile & Kramer 2011).

Researchers of creativity in organizations identify two different forms of motivation, intrinsic and extrinsic. Intrinsic motivation is the most powerful. It is the internal, burning desire to solve problems by wondering and exploring. However, intrinsic motivation can easily succumb to those creativity killers noted in the introduction. The management and workplace environment described under “Motivation” in Figure 2 will help maintain intrinsic motivation. Extrinsic motivation is trickier.

Monetary rewards alone will not boost motivation if it is seen as a means of control versus a bona fide reward for creative work. Encouragement can go a long way toward boosting motivation. We encourage you to give the creative thinking skills exercises described here a try.

We hope that the exercises help foster creativity from a process standpoint and results in a deliverable that makes a positive impact on your work life and on your community’s life.

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## Appendix

The following checklists can help you evaluate existing staff reports and plan future improvements.

### Necessary Content

- Identify the application request
- Identify application number
- Applicant name and company (if applicable)
- Site address/general location
- Site map showing an aerial view of the subject site
- Identify the size of the parcel
- Identify the size of the proposed structure or tenant space
- Current zoning classification
- Current land use classification
- Future land use designation (from Comprehensive Plan)
- Site history, including previous entitlements/approvals
- Review of whether adequate utilities (water, sewer, energy) can be or have been provided to the site
- Review of available transportation infrastructure (road, bicycle, pedestrian, transit)
- Staff recommendation with justification and any recommended conditions

### Desirable Content

- Map showing the site location within the jurisdiction
- Map showing zoning in the vicinity
- Map showing future land uses planned in the vicinity (from Comprehensive Plan)
- Identify the parcel/property ID
- Table comparing zoning and land use on adjacent properties to the subject site
- Review of how the application relates to the Comprehensive Plan (or any other applicable plans adopted by the jurisdiction)
- Cite specific code sections when discussing detailed requirements
- Include an overview of the review/approval process for the application and key timeline information for the next steps in the process
- Identify if a public hearing is required
- Name of staff member writing the report
- Information regarding the methods/dates of public notification for public hearing

### Other Content to Consider

- Property owner name
- Bird's eye view of the subject site
- Photos of the subject site
- Proximity to nearest public park
- Proximity to nearest schools
- Note if the site is within a floodplain
- Include the criteria for reviewing the application (findings of fact for special use permits, rezonings, or variances) and responses for each category
- Recommendations for solutions to unresolved issues with the applications
- Add language for proposed motions
- Notes of any relevant neighborhood meetings between the applicant and interested members of the public
- Notes if staff discussed the application with neighboring jurisdictions

### Formatting Ideas

- Use cover sheet for basic information and summary (in case no one reads anything else!)
- Put recommendation in a consistent location
- Put photo/map of site on the cover sheet
- Add page numbers
- Include application information in header/footer
- Create standard formatting styles for headings, body, tables, graphic labels, etc.
- Use bullet points
- Use sidebars
- Label graphics/photos
- Use tables to align graphics/photos when multiples appear within the same section
- Use the jurisdiction's branding colors, fonts, and design features



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