

# d (2) Development Service Transformation Update

Smart Cities and Service Improvements Committee

March 03, 2022

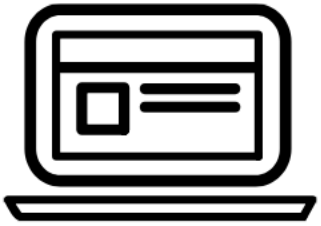
Christopher Burton, Director, Planning, Building and Code Enforcement

Alex Powell, Chief of Staff, Planning, Building and Code Enforcement



# **Development Services Transformation**

# Development Services Transformation Objectives



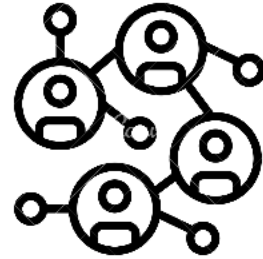
Simple, Self-serve, Digital User Experience

Drive process, technology and data transformation to enable self-service and improve quality of service



Clear, Consistent, Effective Process

Simplify and clarify our process, messaging and presentation of information so customers get it right the first time



Strong, Collaborating Team













































Establish and sustain a high-performing team to champion problem solving and drive results

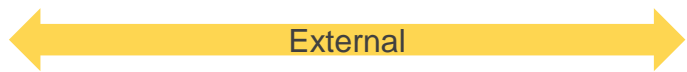


Great Internal Tools to Enable Teamwork

Drive improvements internally and across departments to enable expert collaboration

# Transformation Look Ahead

Project	Est. Objectives Impact	Status	Next Steps
<b>SJPermits v2.1</b> Start Application Online	             	✓ SJPermits v2.0  ✓ 8 New Self-Admin Building Permits Types	<input type="checkbox"/> Complete Development for v2.1.0 – January 2022 <input type="checkbox"/> User Acceptance Testing for v2.1.0 – February 2022 <input type="checkbox"/> Deploy Start Application – Spring 2022 <input type="checkbox"/> Application Wizard – Summer 2022
<b>SJePlans</b> Building Division	              	✓ Public Works ✓ Planning – 6 major types ✓ Fire Prevention	<input type="checkbox"/> Complete AMANDA Permitting System Modifications – January 2022 <input type="checkbox"/> Complete SJePlans Configuration – Summer 2022 <input type="checkbox"/> Launch Building SJePlans – Fall 2022
<b>Permit Center Appointments</b> Rapid Intakes	              	✓ Virtual Appts ✓ 100% Partner Adoption ✓ Permit Center Reopened	<input type="checkbox"/> Develop New Service Line Appoint System – Early November <input type="checkbox"/> Deploy Website for New Process – Mid November <input type="checkbox"/> Launch New Rapid Intake Process – Late November



Customer Digital Experience



Clear Process



Collaborative Team



Internal Tools

## Impact Key

Significant Impact













































Moderate Impact

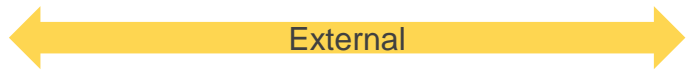
Small Impact

Negative Impact

No Impact



# Transformation Look Ahead

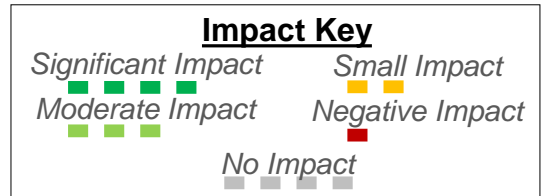
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 Customer Digital Experience
  Clear Process

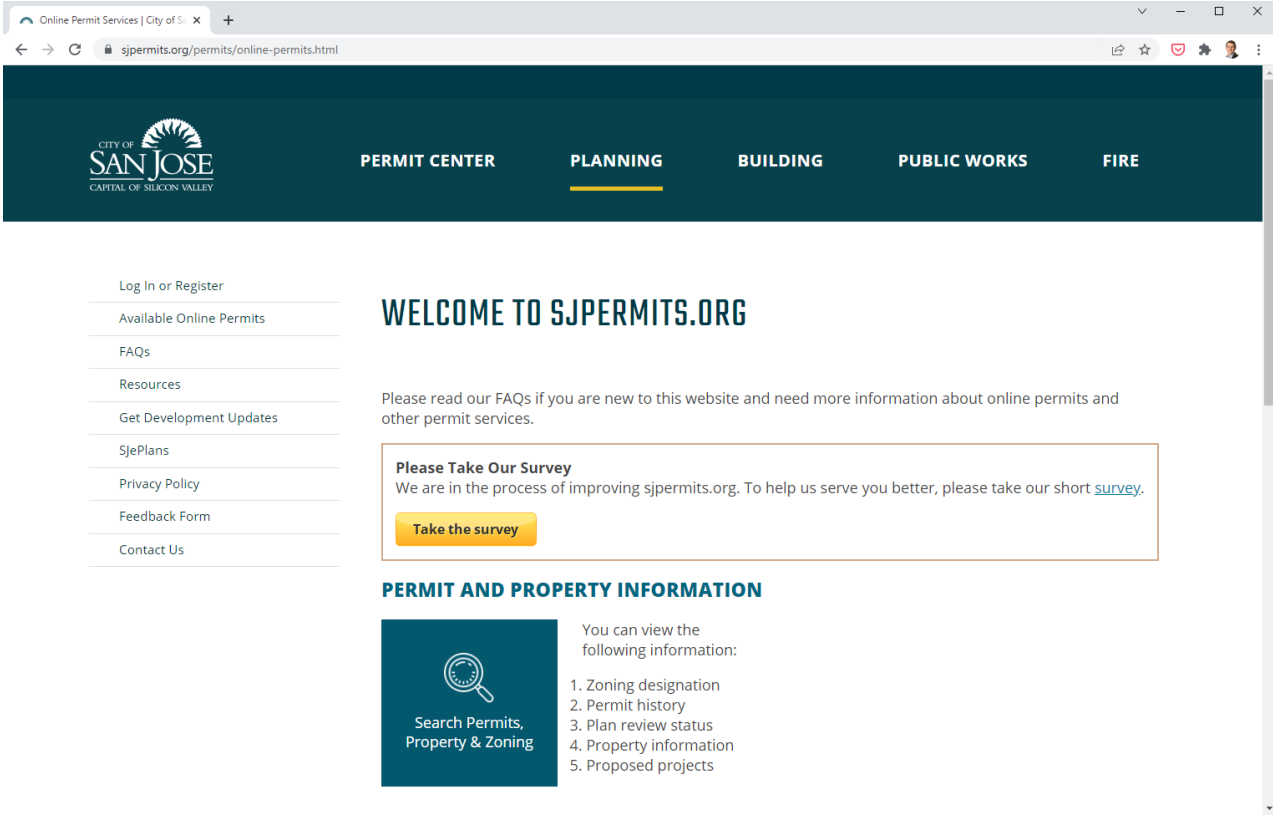
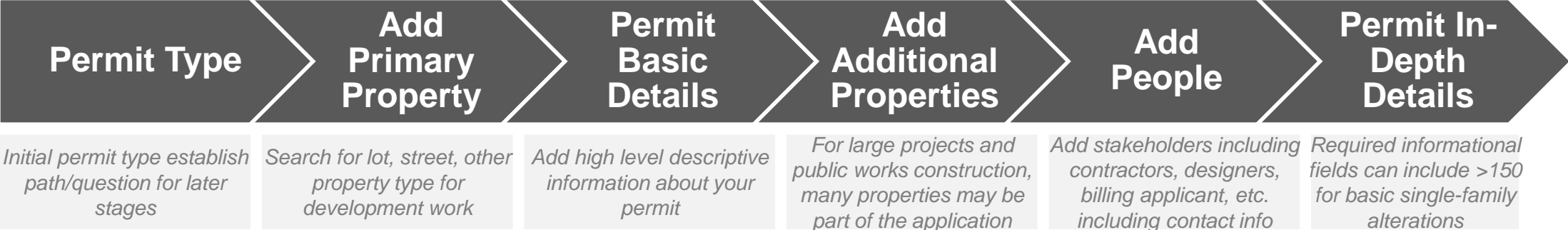


 Collaborative Team
  Internal Tools



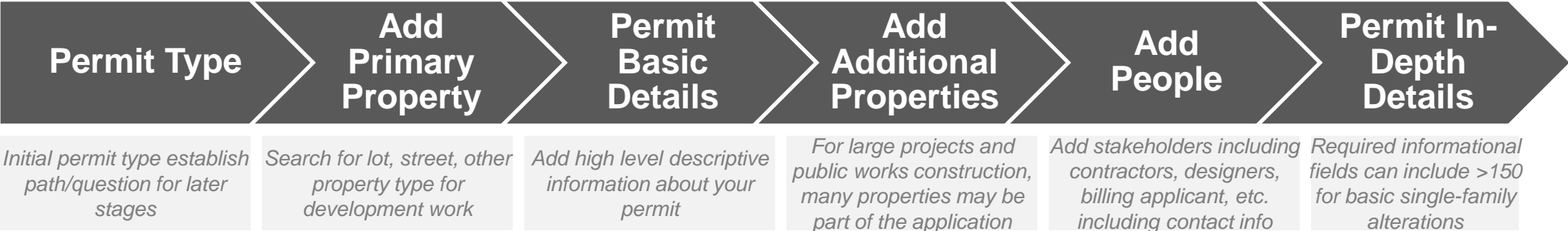
# SJPermits – Customer Start Applications Online

## Steps to Apply for Permit



# SJPermits – Future Permits Available Online

## Steps to Apply for Permit



These administrative steps may add 15-30 minutes per permit for City staff, which can add up over many permits

Division	Est. <u>Customers</u> will be able to start in the first year of SJPermits v2.1.0	% of All Division Applications
Planning	1,208	49%
Building	32,137*	82%*
Public Works	5,879	91%
Fire Prevention	1,424	84%

At 15 minutes a permit.....

Staff can save over 3,000 hours a year entering information from PDFs for customers into our permitting database

\*Includes 50% of Building Permits issued online today and 23% of permits that could be issued online today.



# Permit Center Appointments

Customers have the ability to book appointments online for virtual or in-person services

## Phase 1

March 2021

### Building Virtual Services

#### ADU Submittal

Accessory Dwelling Units

#### Over the Counter (OTC)

Residential Alt/Add with no major structural changes

#### Plan Review Service

New construction or remodels with structural changes

#### Simple Projects

Appliance installations, electrical and plumbing projects, reroofing, or similar projects with no structural changes

Virtual

## Phase 2

August 2 – Permit Center Reopened to the Public

### Fire Prevention Submittal and Support

Application Submittal and Support

### Planning 1<sup>st</sup> Floor

Application Submittal

### Public Works 1<sup>st</sup> Floor

Application Submittal and Support

Virtual (New)

### Fire Prevention Submittal and Support

Application Submittal and Support

### Planning 1<sup>st</sup> Floor

Application Submittal

### Public Works 1<sup>st</sup> Floor

Application Submittal and Support

In-Person

### Finance

Cashier, Business Tax, Accounts Receivable, Utility Bills

### Building

Simple or Over-the-Counter Projects, Inspector Questions and General Info





# Rapid Online Service Intake

New service gives prepared customers quick process for submittal

## Virtual Intake Meetings

Launched March 2021

### Building Virtual Services

#### ADU Submittal

Accessory Dwelling Units

#### Over the Counter (OTC)

Residential Alt/Add with no major structural changes

#### Plan Review Service

New construction or remodels with structural changes

#### Simple Projects

Appliance installations, electrical and plumbing projects, reroofing, or similar projects with no structural changes

Example of Structure Intake Schedule

W7	Mon 2/14	Tue 2/15	Wed 2/16	Thu 2/17	Fri 2/18
12:55	Paul Mathew	Amrit Pruthi	Elhan Marla	Elhan Marla	Elhan Marla
13:00	13:00 - 14:30	13:00 - 14:30	13:00 - 14:30	13:00 - 14:30	13:00 - 14:30
13:05	BL VR - Over the Counter (OTC)	BL VR - Over the Counter (OTC)	BL VR - Over the Counter (OTC)	BL VR - Over the Counter (OTC)	BL VR - Over the Counter (OTC)
13:10	Qmatic Web Booking	Qmatic Web Booking	Qmatic Web Booking	Qmatic Web Booking	Qmatic Web Booking
13:15	Proposed Side Bathroom	210/22 EN - Spoke to Am	REQUIRED PROJECT /	7227 Glenview Dr	1055 Laurie Ave San Jose
13:20	210/22 EN - Left a messa	Permit number 21-080288	Convert part of our 4 car g	150 Sq ft pool Pool Engin	150 Sq ft pool Pool Engin
13:25		210/22 EN - 5744 Trowb	New free-standing Strukt		
13:30					
13:35					
13:40					
13:45					
13:50					
13:55					
14:00					

## Rapid Online Service Intake (“ROSI”)

Full Launch January 24, 2022

For customers that have **best prepared, experienced** applications, they can submit their plans using a timepoint reservation system that will get their intakes processed within two weeks.

- Limited to Plan Review Intake only
- Without structured meetings, number of available reservations can scale based on staff availability
- Staff are ahead of schedule processing applications before timepoint

### Successful Intakes

86



Since full Launch

### Cancelled Appts

39



Since full Launch

### Estimated Efficiency

20%



20% more application intake per staff

### Next Steps

Expand to second “line for plan review”

Prepare for rollout to other service type

Continue customer support with additional needs

# Online Guides for Permit Customers

Creating new resources to support Digital Self-Service Tools for customers

## Check Permit Status Online Guide

Launched December 2021

### PROCESS DETAILS SCREEN EXAMPLE

In the example screen below, this permit is in the third round of changes that were submitted on 11/23/21. Staff set a target date of 12/09/21 to complete this review.

1. Under **Process Name**, you will see the various work activities related to the project. Each process represents a task that must be closed before a permit can be issued. All inspection processes must be closed before a permit can be finalized.
2. For this permit, **RS Building Review** is the main building technical review. You can see that it is open and in processing.
3. You can sort the display by field. This one is sorted by **Process Status**.
4. **Date Started / Date Ended** – Shows when a process was started or ended. The **Target End Date** is when the staff expect to complete the review.
5. The staff assigned to the process are listed under **Assigned User** and their contact email is listed under **Assigned User Email**.
6. Some processes may be open but unassigned until later in the process.
7. Clicking on **Detail** will open a **Process Results** window. This shows details for the activities in process.
8. This detail shows the plans were resubmitted on 11/23/21 and the name of the reviewer with email contact info

The screenshot displays a web application interface for checking permit status. It features a table with columns for Process Name, Process Status, Date Started, Date Ended, Target End Date, Assigned User, and Assigned User Email. The 'RS Building Review' process is highlighted. A 'Detail' button is visible next to it. Below the table, a 'PROCESS RESULTS' window is open, showing a list of activities with columns for Result, Assignee, Email Address, and Date. The 'RS Building Review' process is also shown in the 'PROCESS RESULTS' window.

## Online Video Guides

Video	Launched	Views
Schedule Intake Appt Demo	March 2021	<a href="#">3,000</a>
Upload Project Files Demo	June 2021	<a href="#">2,000</a>
Apply for Kitchen/Bath Remodel Permit	Nov 2021	<a href="#">450</a>
Apply for Subtrade Building Permit	Nov 2021	<a href="#">250</a>

<https://www.sanjoseca.gov/business/development-services-permit-center/available-online-permits-sjpermits-org/how-to-check-your-permit-status>



# Future Status Reporting

Development Service Transformation will be reported quarterly to the Community and Economic Development Committee.

- Initial quarterly report on February 28, 2022
- Next report on May 23, 2022



# Questions