Development Services Process Improvements and Dashboard Status Report

PBCE Customer Service Charter

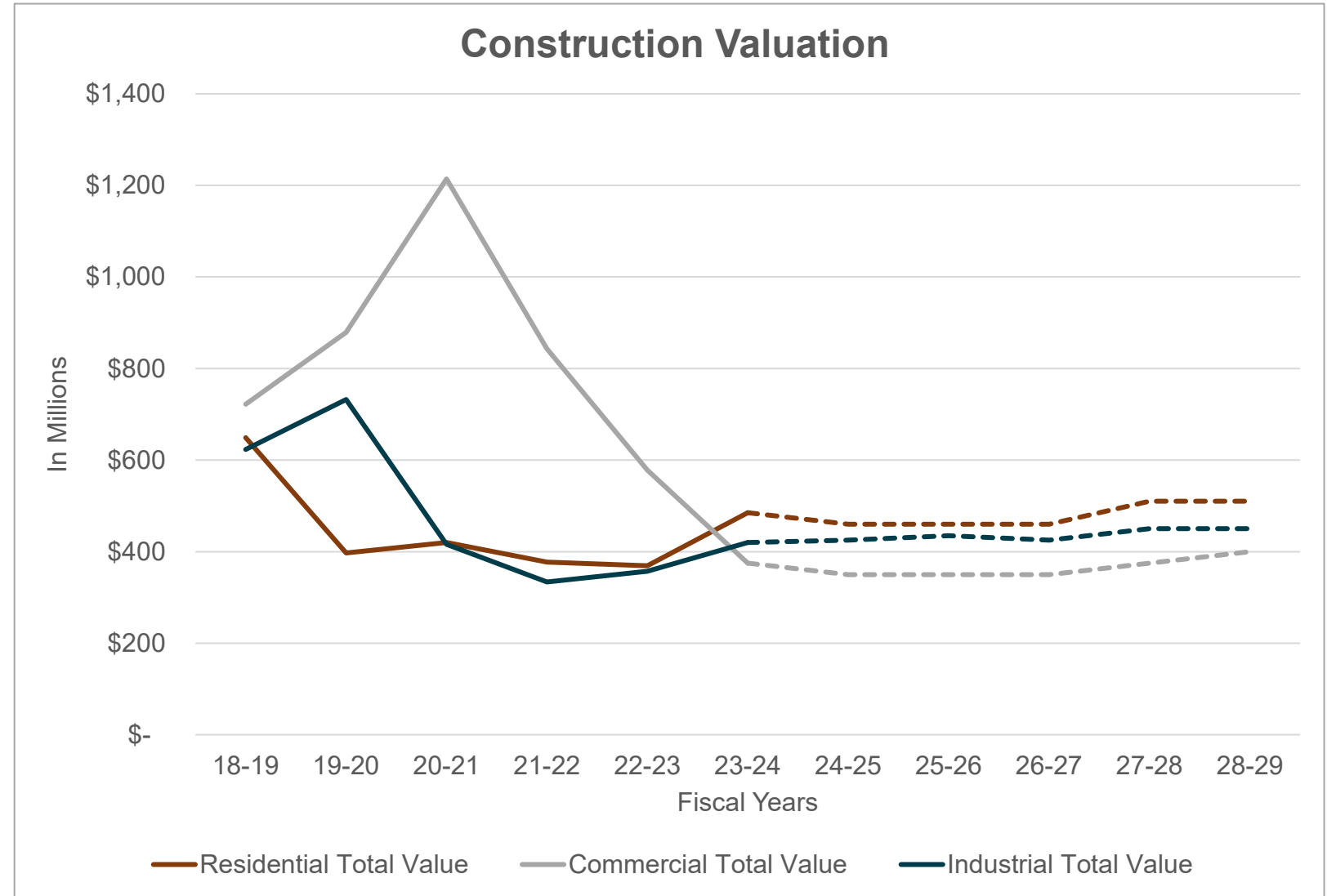Community and Economic Development Committee
March 25, 2024
Item (d)3

Chris Burton, Director, Department of Planning, Building, and Code Enforcement (PBCE)
Alex Powell, Chief of Staff, PBCE
Lisa Joiner, Building Deputy Director, PBCE

- Development Uncertainty

- Permit Applications

- Development Services Response

Construction Valuation

In Millions / Fiscal Years

Legend: Residential Total Value, Commercial Total Value, Industrial Total Value

Customer Service Charter

Website

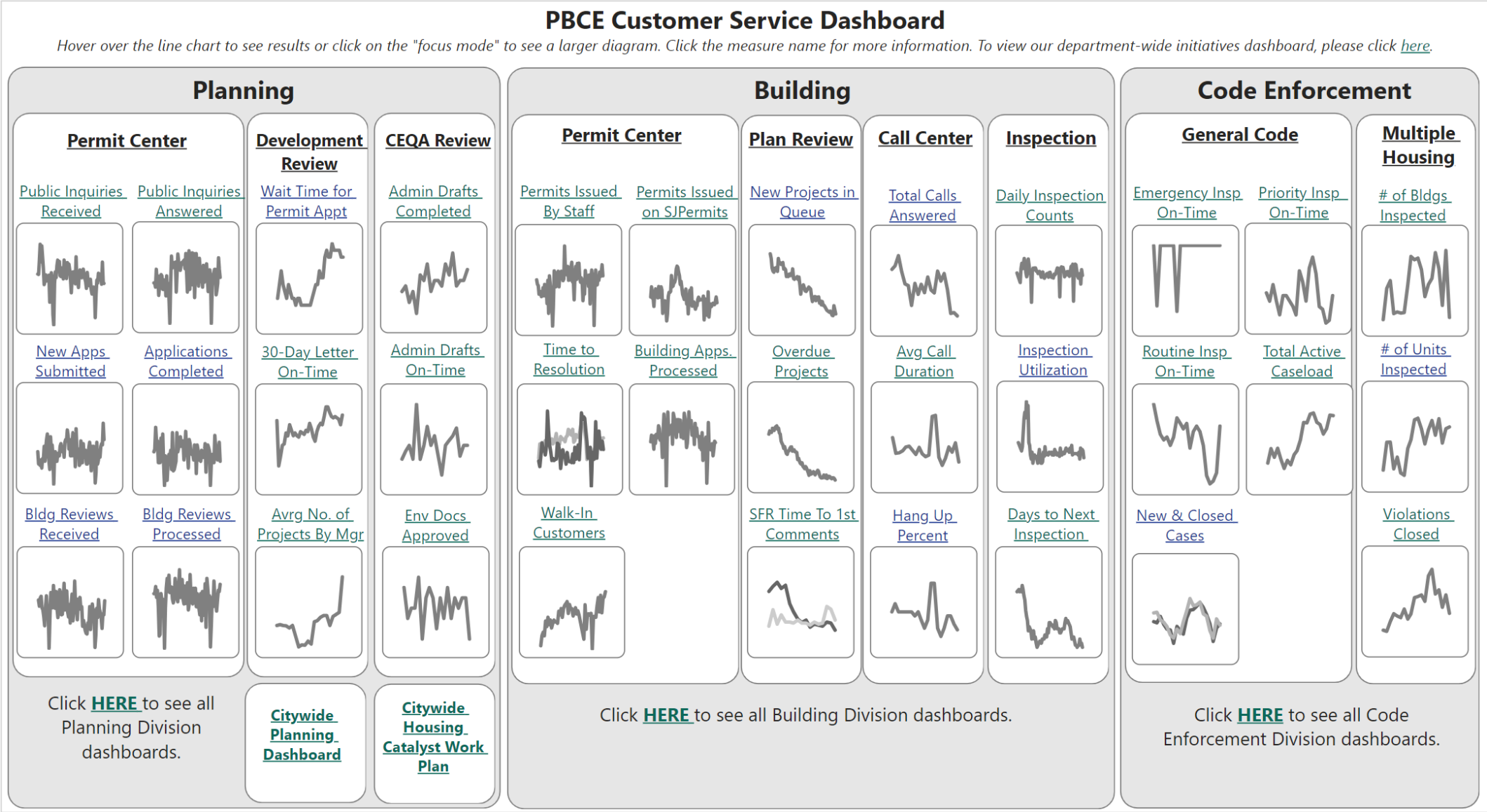Department-wide written commitment to provide excellent customer service.

Vision

PBCE has a public Charter that details the services, metrics, and resources that actively guides all staff in PBCE in the ongoing pursuit to provide excellent customer service.

Purpose

The Charter should help organize department's goals to make informed management decisions to make meaningful strides towards our goal to be an excellent public service organization.

PBCE Customer Service Charter Dashboards

Access to All Individual Dashboards

Changes to the CSC to tell a more complete and clearer story.

1 **Historic Disruptions**

2 Combined

3 Design Improvements

4 New Plan Review

Walk In Customers Served

Walk-In Customers Served

Disruptions

- **January 29, 2024-** Public Info Update: During this time customers were directed by staff to walk in rather then scheduled appointments for questions regarding their building permits.
- **December 25, 2023 - Jan 3, 2024-** Holiday: During this time City Hall was closed for the holidays.
- **October 16-November 6, 2023-** System Upgrade: During this period, our tracking system for this measure underwent an upgrade, making us temporarily unable to monitor data.

Violations Closed per Month

Violations Closed per Month

Disruptions

- **September 2024-** New Inspectors: The onboarding of several new inspectors led to an increase in the number of violations being addressed and closed.
- **Jul to Oct 2023-** Tier 3 Focus: During this time our team shifted focus to inspecting Tier 3 buildings which are more prone to having multiple violations.

Changes to the CSC to tell a more complete and clearer story.

1 Historic Disruptions

2 Combined

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4 New Plan Review

Time for 1st Comments Sent – Residential

Time for 1st Comments Sent

● SFR Add/Alterations ● SFR New

Peak Staffing

Days

60

40

20

Jan 2023   Jul 2023   Jan 2024

Reporting Window

Added Additions/Alterations to the Single-Family Residential New Construction Dashboard to show both measures in one place.

Changes to the CSC to tell a more complete and clearer story.

1 Historic Disruptions

2 Combined

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Average Call Duration

● Processing/Directing Time ● Average Wait Time

Average Call Duration

Minutes

10

Fully Staffed

Goal 5.00

5

0

Jul 2022   Jan 2023   Jul 2023   Jan 2024
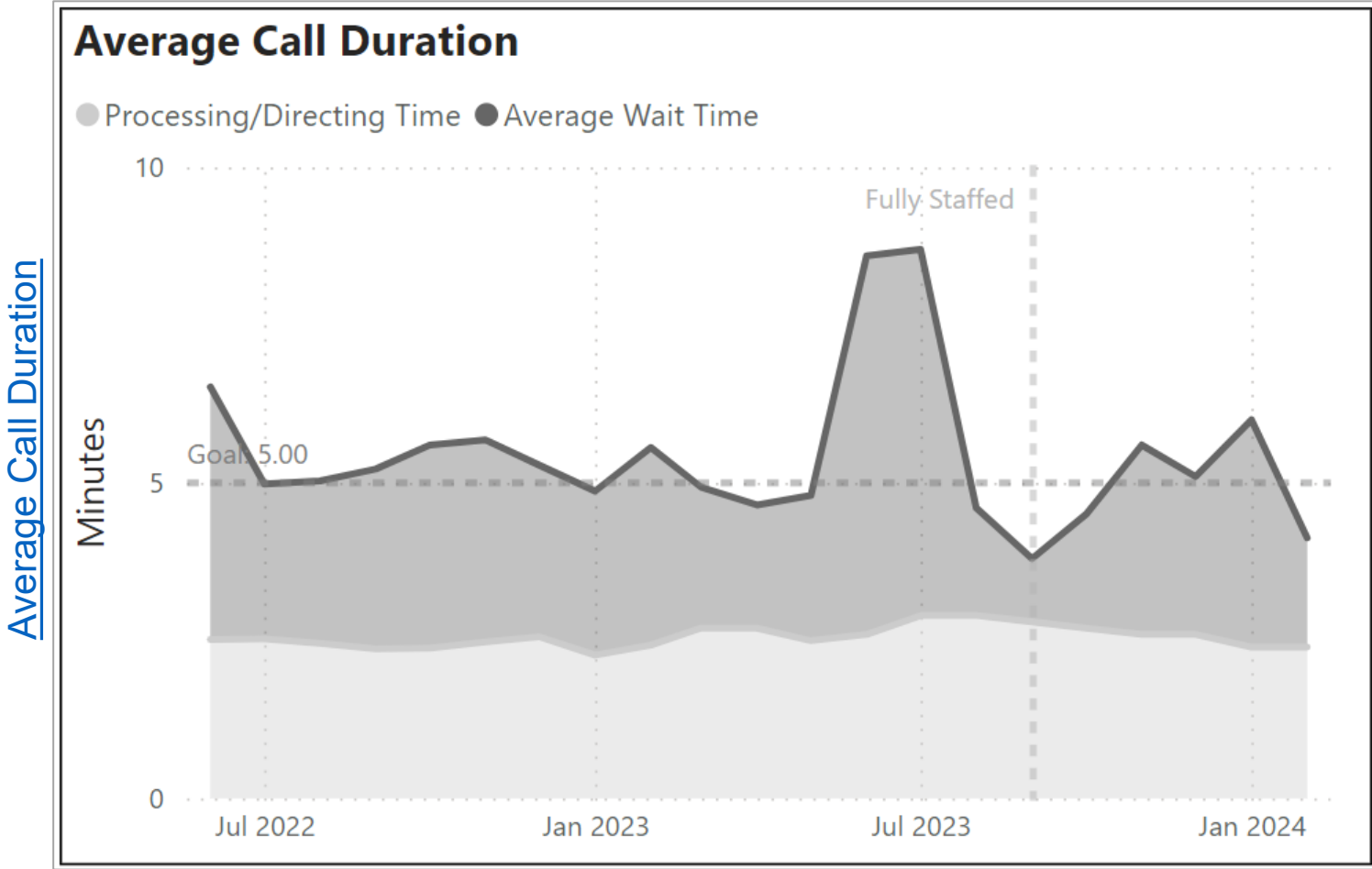
Aggregated the Building Call Center by average wait time and time processing their call for a complete picture of the customer experience.

Changes to the CSC to tell a more complete and clearer story.

1 Historic Disruptions

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Number of Project Applications in Review Per Project Manager

PBCE Dashboard | **Planning Dashboard**

Measure Definition

This metric illustrates the number of project applications currently in review per Project Manager on the Planning Development Review team.

Applications In Queue

40.5

3/3/2024

Division	Operation	Measure Type
Planning	Development Review	Productivity

Summary

The metric illustrates the caseload of each project manager. The metric is a vital tool to consider, as a higher number may lead to less productivity in terms of meeting timelines. Additionally, increased caseloads reduce the department's ability to implement new process improvements, provide training, respond to non-project inquiries and other non-project duties. This project caseload is an average. Given the different complexity of projects and experiences, some planners may have more or less than the average. Additionally, this number does not consider non-discretionary projects or preliminary reviews, as those projects work on a different timeline and are at different levels of complexity. This measure helps justify budget allocation by showing the workload during busy periods, which is crucial for efficient resource management and budget planning.

Number of Project Applications In Review

Staff Departure

40

35

30 Goal

Jul 2023 — Sep 2023 — Nov 2023 — Jan 2024 — Mar 2024

# of Review Cycles

Owner
John Tu

Goal/Standard
30 Projects

Disruptions
- **November 12, 2023:** Staff Departure- At this time the Planning Development Review team had a staff member leave resulting in a slight increase in project applications in review by managers.

General Impacts
- Holidays
- Interdepartmental Delays
- Market/Economy Trends
- Staffing levels

Data Source
AMANDA Permitting System

Number of Project Applications Per Project Manager

Changes to the CSC to tell a more complete and clearer story.

1 Historic Disruptions

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Average Review Cycle for Completed Projects

PBCE Dashboard   **Planning Dashboard**

Measure Definition

This metric illustrates the average number of review cycles required for to complete a discretionary Planning entitlement projects.

Average Review Cycle

2.45

3/3/2024

Summary

The following metric demonstrates the average amount of review cycles (submittal and resubmittals) required for completed projects that typically go to public hearings. It assesses how efficiently the Development Review Planner and review partners review and provide comments and feedback to project applicants. A lower number of average review cycles typically indicates staff has provided clear and correctable comments to project applicants. Monitoring this metric helps us identify bottlenecks, inefficiencies, and areas for improvement in the review process, allowing our team to enhance productivity.

Goal Description: The objective is to optimize our development review process by reducing the average review cycles per project to 2 or fewer. Acknowledging that the development review process is tied to various dependencies like building plan review, stakeholder ability to high quality resubmittals, and project complexity is essential. These dependencies frequently impact the efficiency of our reviews.
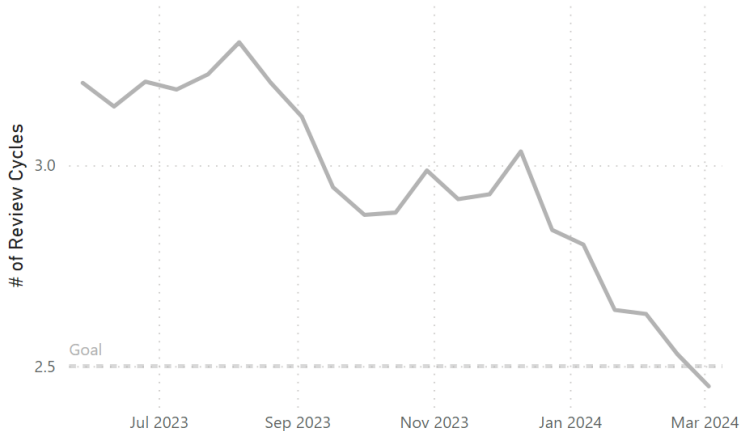
Division	Operation	Measure Type
Planning	Development Review	Productivity

Owner	Goal/Standard
John Tu	2.5 Cycles

Disruptions	General Impacts
	• Sufficient Planners to process plans/projects on time and adjust to the volume of projects. • Staffing- Staff absences and time off. • Delays in comments or reviews by other departments may lead to delays in Planning development reviews. • Changes in application requirements • Software, applications, and or changes to the submittals or resubmittals programs.

Average Review Cycle

# of Review Cycles

3.0

Goal 2.5

Jul 2023   Sep 2023   Nov 2023   Jan 2024   Mar 2024
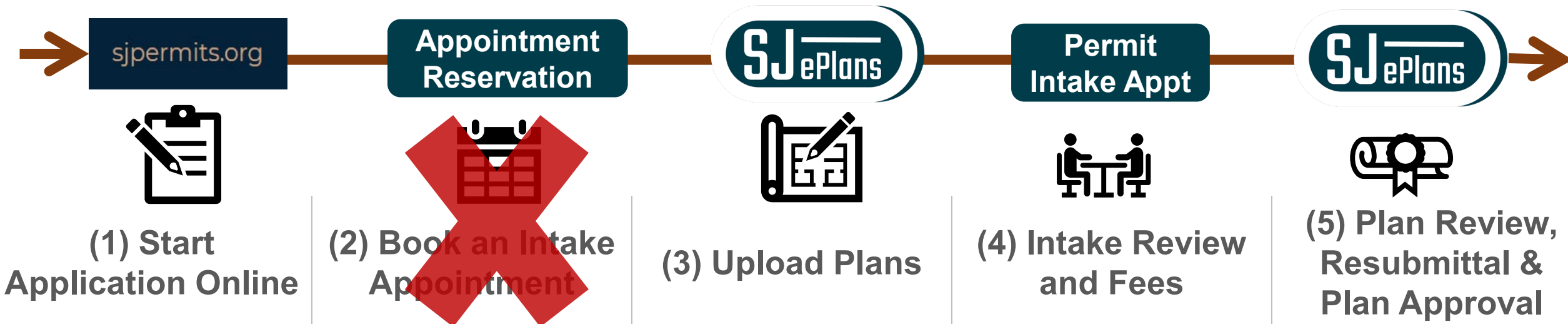
Data Source
ProjectDox (Project Submittal and Comment Tracker) and AMANDA (Permitting System)

Average Review Cycles for Completed Projects

Most Building permit plan review applications now started on SJPermits.org with customers uploading their files to SJePlans.

Launched Oct 2023!

| sjpermits.org → Appointment Reservation → SJ ePlans → Permit Intake Appt → SJ ePlans |

(1) Start Application Online

(2) Book an Intake Appointment

(3) Upload Plans

(4) Intake Review and Fees

(5) Plan Review, Resubmittal & Plan Approval

Implementation has:

- Reduced time for permit intake (25 days to 4 days)
- Streamlined plan coordination between applicants & departments
- Given applicants better insights into their place in the application/review process

Due to new process improvement, old measures were removed, and new ones created.

Applications Processed

How many Building permit application are accepted by the Permit Center

Link

Time to Issue Resolution

Tracking how quickly customer questions are resolved.

Link

Old Measures Removed | *(1) Time to Next Appointment, (2) Total Appointments Scheduled, (3) Appointments Held With Customers*

Completed

1 Expansion of Improvements Initiatives

1a Populating Improvement Initiatives

2 Incorporate Audit Recommendations In Dashboards

In Progress

3 Solicit Input from Development Community

4 Results from Customer Survey

6b Evaluate Multiple Round of Review Process Improvements

6c Evaluate Citation of Regulations in Comment Letters

6f Plan Review Phone Support

Up Next

5 Assess Cost Implications of Regulatory Framework

6a Evaluate Existing Pathways For Feedback

6d Staff Capacity for Studies

6e Simplify Regulatory Framework

Improvement Initiatives

PBCE Customer Service Charter- Initiatives

The Department is committed to improving on the measures included as part of the Customer Service Charter. There are many ongoing initiatives that are categorized

- **Status** - Defines if the initiative is currently being worked on (In-Progress), has not been started (Backlog), has been completed (Completed) or if it has been launched and continues to be utilized in our process (Completed-Ongoing).
- **Impact** - Categorizes the magnitude of the impact of the measure. High impact will be immediately and significantly noticed by customers. Low impact will indirectly impact customers in a more subtle way.
- **Effort** - Categorizes the time, resources and staff required to complete each initiative.

Division Initiative Counts

Planning	Building	Code
33	24	26

Use filters/dropdowns to refine your search.

Filter By: Status & Type
- ☐ Partly Implemented/In-Progr…
- ☐ Not Implemented
- ☐ Completed - Ongoing
- ☐ Completed
- ☐ Backlog

Filter by Status and Initiative Type

Audit Recommendations

Improvement Type	Title And/OR Reccomendation #	Description	Est. Date	Status	Effort	Impact
Improvement Initiative	Program EIRs for Urban Villages and Area Plans	Complete EIRs for Urban Villages and area plans so future applications may complete addendums as opposed to full EIRs.		Partly Implemented/In-Progress	High	High
Improvement Initiative	Public Information/Customer Service Enhancements	Updating Planning's key online assets—webpages, applications, and documents—to ensure accurate, reliable information that aligns with current practices and requirements. This initiative aims to provide our staff and customers with a consistently improved online experience.	Ongoing	Partly Implemented/In-Progress	Medium	Medium
Improvement Initiative	Recruitment Tracker	The recruitment tracker collects data regarding past and current recruitments within PBCE. The tracker helps us track how long each step of the recruitment process takes and also shows us how well each of our hiring managers performs.	Completed - 03/07/22	Completed - Ongoing	Low	Low
Audit Reccomendation	Residential Building Permits	To improve the process for assigning projects to Plan Review staff or consultants, Planning, Building and Code Enforcement should: a. Develop a process to assign projects to appropriate staff in a timely manner. b. Clarify which types of projects should be reviewed by inspectors and track the timeliness of completing reviews for first comments and resubmittals. c. Standardize the process for assignment of projects among staff for plan review.		Partly Implemented/In-Progress	Medium	High
Audit Reccomendation	Residential Building Permits 23-07 #01	To ensure the Planning, Building and Code Enforcement's staffing plan accurately considers Building's ongoing staffing challenges, the Department should develop a long-term staffing strategy that: a. Expands its recruiting efforts by bolstering advertising for specific positions,	June 2024	Not Implemented	Medium	High

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