(d). 4. Integrated Permitting System Update

Smart Cities and Service Improvements Committee

June 6, 2019

Rosalynn Hughey, Director, PBCE

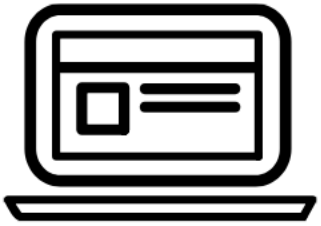Matt Loesch, Deputy Director, PW

Joe Dyke, Associate Engineer, PW

Robert Manford, Deputy Director, PBCE

Sylvia Do, Division Manager, PBCE

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

Development Services Transformation Q1 2019 (Jan. - Mar.)

Objectives

Simple, Self-serve, Digital User Experience	Clear, Consistent, Effective Process	Strong, Collaborating Team	Great Internal Tools to Enable Teamwork

EXTERNAL | INTERNAL

(as measured by) Key Results

EXTERNAL

- ☐ Geocortex implemented
- ☐ Portal roadmap defined
- ☐ Broadening E-plan review with small cells pilot

- ☐ Service Inventory and Prioritization
- ☐ Problem Identification Workshop of top 3 prioritized services (goal = 2 out of 3)
- ☐ Solution Identification Workshop of top 3 prioritized services (goal = 2 out of 3)
- ☐ Begin piloting top 3 (goal = 2 out of 3)

INTERNAL

- ☐ Form Transformation Team
- ☐ Kickoff held
- ☐ Reset with CSDC and contract amended
- ☐ "War room" space reserved
- ☐ Technology/Software for team success procured

- ☐ Spatial DNA implemented
- ☐ Public Works Utilities (Minor) Folders tested and in use
- ☐ Public Works Special Districts Folders 50% complete
- ☐ Planning Single Family, Development, and Environmental Folders tested and in use
- ☐ Scrum adopted and in practice

Development Services Transformation

Development Services Transformation Q1 2019 (Jan. - Mar.)

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EXTERNAL | **INTERNAL**

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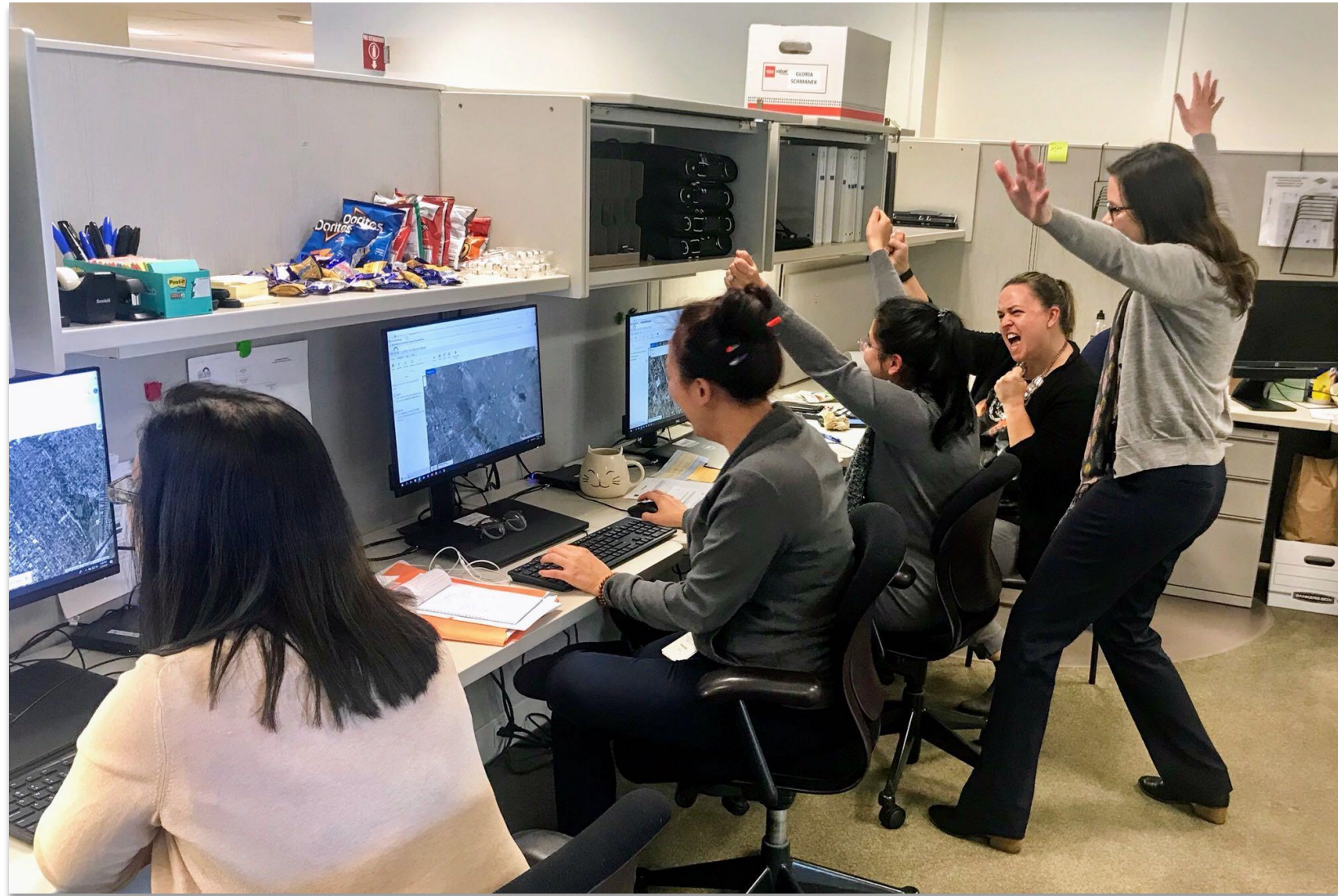- ☐ Broadening E-plan review with small cells pilot

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Legend:

- 🟩 100% of Goal met
- 🟨 >65% of Goal met
- 🟥 <65% of Goal met

Celebrating **working software** and our outfitted Transformation Team "war-room"

Public Works Small Cell Team piloting <mark>electronic plan review</mark>

GeoCortex Demo

Anticipated benefits from implementing GeoCortex (GIS application)

- Single source for property information, reduces time spent researching and generating reports:
  - Parcel Report: 10-45 minutes → 30-60 seconds
    Volume: 50 – 75 times daily
    Rough estimate: 4200 hours per year ($1.2M) reallocated

  - Mailing List for Noticing: 1-8 hours → 30-60 minutes
    Volume: 10 – 15 times weekly
    Rough estimate: 150 hours per year ($42K) reallocated

- Better data integrity (goal is 99% coverage)

CEQA Process Improvement Recommendations

Clear, Consistent, Effective Process

- Eliminating practice of "Fire Wall" for CEQA Documents, so applicants will have information to alter design to reduce mitigation;

- Developing a short-list of pre-qualified CEQA consultants from which applicants will choose (more qualified consultants; higher quality documents);

- Staff training on CEQA basics and advanced CEQA concepts; and

- Better quality control/quality assurance of documents.

Planning Application Process Improvements

Clear, Consistent, Effective Process

Goals

1. Customers submit a complete application the first time: Simplify and clarify minimum Planning application submittal requirements.

2. Reduce rounds of review and overall review time caused by incomplete submittals.

Progress to date

1. Pre-submittal Customer Assistance: Planning and Public Works staff confirms application completeness with customer by phone/e-mail prior to appointment.

2. Customer Assistance at Appointment: Public Works staff attends Planning application in-take appointment to screen application completeness for stormwater review, and assists customers with next steps if there are incomplete applications.

3. Track Data: Staff documents reasons for incomplete applications.

4. Analyze Data and Implement Improvements: Assess what causes incomplete applications. Evaluate and implement ways to improve success rate for complete applications.

Development Services Transformation Q2 2019 (Apr. - Jun.)

Objectives

Simple, Self-serve, Digital User Experience	Clear, Consistent, Effective Process	Strong, Collaborating Team	Great Internal Tools to Enable Teamwork

EXTERNAL | INTERNAL

(as measured by) Key Results

EXTERNAL

- ☐ Online fee and permit estimator contract signed
- ☐ ePlan Review Roadmap defined and approved
- ☐ Complete Public Portal MVP User-Acceptance Testing
- ☐ Select 3 metrics for tracking user experience and establish baseline data

CEQA
- ☐ 80% CEQA documents ready for public circulation after 2nd review
- ☐ 99% Planning application status available online in plain English

Power Teams
- ☐ 80% Single Family & Tree Removal applications ready for hearing or issuance after 2nd submittal
- ☐ 80% Planning applications are submitted complete

INTERNAL

- ☐ Parcel research 80% faster
- ☐ PW Minor Utility Permit Fees processed 90% faster each month
- ☐ 80% staff trained on new workflows (folders) & GIS software
- ☐ 3 Team Members trained as scrum masters
- ☐ Complete 25% AMANDA 7 User-Acceptance Testing

- ☐ Resolve 99% of data errors in parcel and property records
- ☐ Complete User-Acceptance Testing for all new workflows (folders)
- ☐ Planning permit status updates provided 95% faster
- ☐ 50% increase in time-tracking accuracy