

AGENDA

- (d) 1. Development Services Transformation Update
- (d) 2. ADU Process Enhancement Update
- (d) 3. Housing Production Numbers Update



Development Services Transformation

(as measured by)

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

Simple, Selfserve, Digital User Experience



Clear, Consistent, Effective Process



Strong, Collaborating Team

Great Internal Tools to Enable Teamwork



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

Planning Process Improvements

- 99% Planning application status available online in plain English
- 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

*Includes 2 Planning, 2 Fire and 6 Public Works new folders

Goal met: 100% >65% <65%

Q2 Incomplete OKRs

Key Resul

Percent Complete

Reason / Description

	Complete	
Online fee and permit estimator contract signed	20%	 Procurement process slowed progress on this Key Result Non-critical path for other Transformation priorities Q3 Key Result looks to complete procurement and initiate project
☐ Complete 25% AMANDA 7 User-Acceptance Testing	0%	 Ambitious stretch goal Tried to front load testing work to reduce future burden/testing workload Difficulty marshalling resources for non-time critical work Project timeline has UAT phase built in to complete this work
☐ Complete User-Acceptance Testing for all new workflows* (folders)	60%	 Ambitious goal to have all folders built/tested in one Quarter Resources refocused towards Amanda 7 upgrade Remaining workflows to be completed after Amanda 7 upgrade

50% increase in time-tracking accuracy

- 20%
- Underestimated the scope of the issue prior to creating the OKR
- Higher priority, critical path OKRs were worked on ahead of this OKR

Measuring the Impact of Our Q2 Key Results

Key	Result
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Actual Result

<u>Impact</u>

☐ 99% Planning application status available online in plain English

100% Available Online

- Project status is clearly communicated on SJPermits for public reducing phone calls/emails about status
- Status communicated as "under review," "noticing for hearing," or "waiting for resubmittal."

80% Single Family & Tree Removal applications ready for hearing or issuance after 2nd submittal

100% Ready for Hearing

- Applications updated for greater clarity on submittal requirements
- Approval criteria communicated to customers upfront
- Review cycles reduced because only complete applications are accepted for processing

30% Planning applications are submitted complete

82%Submitted Complete

- Data used to evaluate and implement ways to improve success rate:
 - Updated written communications for clarity on minimum submittal requirements.
 - Pre-submittal customer assistance.
 - o Enhanced customer assistance at appointment.

■ 80% CEQA documents ready for public circulation after 2nd review 66% Ready after 2nd review

- Data limited so far: CEQA document review typically longer than three months
- Team was able to identify improvements that are scheduled for Q3 and beyond

Objecti

(as measured by) Key Results

Development Services Transformation Q3 2019 (Jul. - Sept.)

Simple, Selfserve, Digital User Experience

Clear, Consistent, Effective Process

Strong, Collaborating Team Great Internal Tools to Enable Teamwork

EXTERNAL

- ☐ Identify a Digital CustomerExperience Lead☐ Online fee and permit
 - estimator contract signed and project initiated
- 25% increase in the top five online permits
- Baseline and track Customer
 Satisfaction
- ☐ 4 out of 5 test users can successfully apply for a Photovoltaic and Water Heater permit in Public Portal test

- ☐ Baseline and increase ADU permit issuance within 2 reviews by 40%
- ☐ Complete and implement 4 out of 12 CEQA Process Improvements
- ☐ 100% of Planning Projects have an estimated public hearing schedule by Review Cycle #2
- Map customer journey for 2
 Building and 2 Planning application
 processes to identify upstream pain
 points that impact customer
 readiness

INTERNAL

- User-Acceptance Testing
- ☐ Develop Change Management
 Plan for A7 User Training
- 8 new AMANDA workflows are adopted and in use by all teams
- 6 new staff onboarded
- Baseline and increase Planning division time tracking by 50%
- ☐ Launch Macro Cell Site Team

- AMANDA 7 application upgraded and technology ready
- Stand up GeoCortex on-premise
- AMANDA 7 works with all Priority 1 integrated business systems
- ☐ Stand up ProjectDOX infrastructure & configure 1 e-Plan

Review workflow

- ☐ All San Jose mailing lists are
- created using GeoCortex

 Identify a technology solution for
 - Fire to better respond to customer questions

CEQA Process Improvement Recommendations

2019 Q2

Eliminating "Fire Wall"

Quality Assurance of Documents

2019 Q3

- Develop and Distribute Guidelines for Initial Study
- Develop and Distribute Roadmap for CEQA Path Determination
- Determine Metrics for **CEQA Success**

Publish Environmental Consultant List (Est August 2019)

Upcoming (Tentative)

- ☐ Revamp SOP for Internal and External Use
- Establish SOP for External review
- ☐ Complete Exemption Guidelines
- ☐ Organize Webpage Content
- ☐ Update Standard Permit Condition and Mitigation Measure List
- ☐ Develop and Distribute CEQA Threshold guidelines

Ongoing

CEQA Measurements

Metric #1



Metric #2



Metric #3



☐ CEQA Consultant List

☑ Staff Training

CEQA 101 (April 22), CEQA Workshop with Sohagi Law Group (May 2), GHG Training with ICF (June 7), EIR Process (June 27), EIR Considerations (Aug 8)



AMANDA 7 Upgrade Timeline

 August
 September
 October
 November
 December

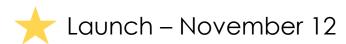
 IT Infrastructure Build

Final Staff Testing (Bldg, PW, Planning, CE, Fire, ESD, ITD)

Internal Staff Communications for Testing and Training

Public Customer Communications Regarding Service Level Impacts

Staff Trainings



Onboarding

Next Steps: (1) Electronic Plan Review (2) Updated Portal

