

Ad-Hoc Committee on Housing Construction and Development Services

August 22, 2019



AGENDA

(d) 1. Development Services Transformation Update

(d) 2. ADU Process Enhancement Update

(d) 3. Housing Production Numbers Update



**Development
Services
Transformation**

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

- 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

- 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

Goal met: ■ 100% ■ >65% ■ <65%

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

Q2 Incomplete OKRs

<u>Key Result</u>	<u>Percent Complete</u>	<u>Reason / Description</u>
<input type="checkbox"/> Online fee and permit estimator contract signed	20%	<ul style="list-style-type: none">• 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
<input type="checkbox"/> Complete 25% AMANDA 7 User-Acceptance Testing	0%	<ul style="list-style-type: none">• 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
<input type="checkbox"/> Complete User-Acceptance Testing for all new workflows* (folders)	60%	<ul style="list-style-type: none">• 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
<input type="checkbox"/> 50% increase in time-tracking accuracy	20%	<ul style="list-style-type: none">• 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

Actual Result

Impact

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

80% 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.
 - 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



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

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

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Identify a Digital Customer Experience Lead <input type="checkbox"/> Online fee and permit estimator contract signed and project initiated <input type="checkbox"/> 25% increase in the top five online permits <input type="checkbox"/> Baseline and track Customer Satisfaction <input type="checkbox"/> 4 out of 5 test users can successfully apply for a Photovoltaic and Water Heater permit in Public Portal test | <ul style="list-style-type: none"> <input type="checkbox"/> Baseline and increase ADU permit issuance within 2 reviews by 40% <input type="checkbox"/> Complete and implement 4 out of 12 CEQA Process Improvements <input type="checkbox"/> 100% of Planning Projects have an estimated public hearing schedule by Review Cycle #2 <input type="checkbox"/> Map customer journey for 2 Building and 2 Planning application processes to identify upstream pain points that impact customer readiness |
|---|---|

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Complete 90% AMANDA 7 User-Acceptance Testing <input type="checkbox"/> Develop Change Management Plan for A7 User Training <input type="checkbox"/> 8 new AMANDA workflows are adopted and in use by all teams <input type="checkbox"/> 6 new staff onboarded <input type="checkbox"/> Baseline and increase Planning division time tracking by 50% <input type="checkbox"/> Launch Macro Cell Site Team | <ul style="list-style-type: none"> <input type="checkbox"/> AMANDA 7 application upgraded and technology ready <input type="checkbox"/> Stand up GeoCortex on-premise <input type="checkbox"/> AMANDA 7 works with all Priority 1 integrated business systems <input type="checkbox"/> Stand up ProjectDOX infrastructure & configure 1 e-Plan Review workflow <input type="checkbox"/> All San Jose mailing lists are created using GeoCortex <input type="checkbox"/> Identify a technology solution for Fire to better respond to customer questions |
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CEQA Process Improvement Recommendations

CEQA Measurements

2019 Q2

2019 Q3

Upcoming (Tentative)

- Eliminating "Fire Wall"
- Quality Assurance of Documents

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

- 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

Metric #1



Metric #2



Metric #3



CEQA Consultant List

Publish Environmental Consultant List
(Est August 2019)

Staff Training

Ongoing

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

