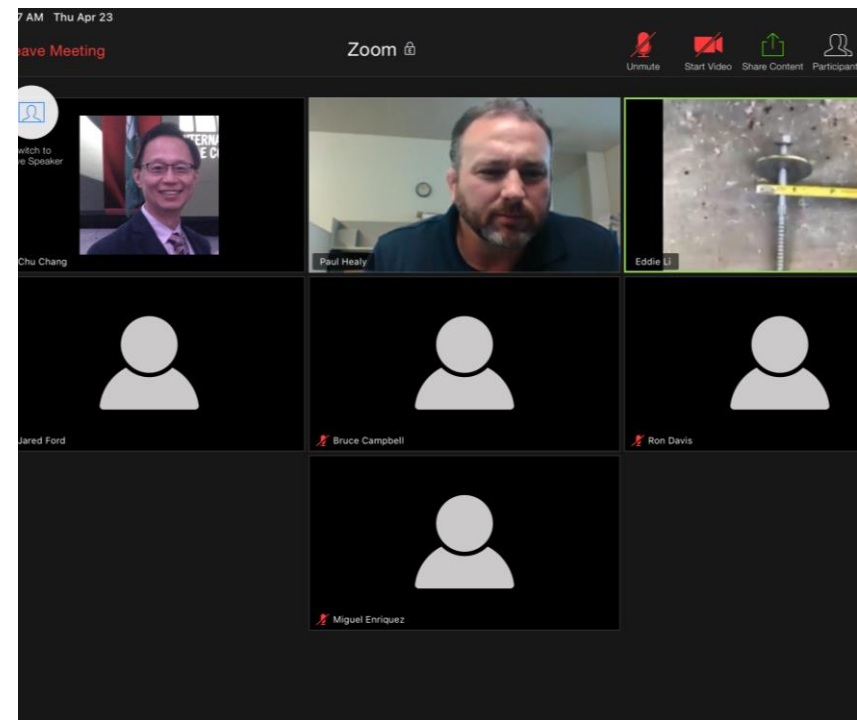




# **Development Services Transformation**



# Development Services Transformation Q1 2020 (Jan. - Mar.)

## Objectives

Simple, Self-serve, Digital User Experience

Clear, Consistent, Effective Process

Strong, Collaborating Team

Great Internal Tools to Enable Teamwork

## EXTERNAL

☐ Complete 90% User Acceptance Testing for new Online Permitting Portal (version 2.0)

☐ Publish public Performance Measure Dashboard on Speed, Throughput and Ease of Use

### PROCESS IMPROVEMENTS

☐ 65% ADU Permits issued within 2 review cycles\*

☐ Develop and present the City of San Jose CEQA Instruction Guide to Environmental Consultant Roundtable

☐ Hire or contract fill 5 out of 5 Fire Development Services vacancies\*

## INTERNAL

☐ Finalize Technology Fee Study recommendations

☐ Design and build 2 Electronic Plan Review workflows

☐ Develop digital inspection prototype

☐ Deploy 2 new Public Works AMANDA workflows

☐ Design and build 1 Fire AMANDA workflow

## Key Results

- ☐ 100% goal met
- ☐ > 65% goal met
- ☐ < 65% goal met

\*brought forward or adapted from a Q3 Key Result



# Development Services Transformation Q2 2020 (Apr. - Jun.)

Objectives

Simple, Self-serve, Digital User Experience

Clear, Consistent, Effective Process

Strong, Collaborating Team

Great Internal Tools to Enable Teamwork

## EXTERNAL

## INTERNAL

❑ Launch new Online Permitting Portal (SJPermits 2.0) †

❑ 60% ADU Permits issued within 2 review cycles\* †

❑ Complete Final Report and Model for Technology Fee (*not advance Tech Fee to Council*)

❑ Prepare 5 Planning and 15 Public Works Electronic Plan Review permits for go-live

❑ Complete Electronic Plan Review integration requirements for Fire and Building permits †

❑ Deploy Building digital inspections form and process

❑ Deploy Fire Engineering AMANDA workflow

❑ Deploy AMANDA Public Works Utility workflow enhancement

❑ Complete design for Fire digital inspection prototype

100% goal met  
> 65% goal met  
< 65% goal met

\* brought forward or adapted from a Q1 Key Result  
† continued to Q3 Key Result

# Digital Inspection Form – Building

## Operational Impact

- Digitize 350 Inspection Slips Daily
- Eliminate the handwritten character recognition errors
- Save 400-500 hours/year printing inspection slips
- Save each inspector almost 1 hour each day not having to pick up inspection slips
- Inspection Results Available within 2 hours (previously 2-5 days)
- Save \$70,000 in paper based equipment (paper, ink, maintenance) process each year

The image shows a side-by-side comparison of a physical building inspection notice form (left) and its digital version (right). A large grey arrow points from the physical form to the digital form, indicating the transition from paper to digital.

**Physical Form (Left):** Titled "BUILDING INSPECTION NOTICE". It contains fields for Confirmation # (01820346), Received (05/18/2019), By (Phone), Scheduled (07/02/19), Tract (885), Lot (68), # of Units (0), Map (55 G 6), Address (2067 FOLLE BLANCHE DR SAN JOSE), Contact (JOSE), Phone ((408) 409-9861), ETA Call (Y), Owner (SMITH MERIL R AND BARBARA S TRUSTEE), Contractor (STYLE IT USA), Work ((669)246-2202), Folder Name ((P100%) ADD WALK IN SHOWER), Subtype (Condo), Work Proposed (Additions/Aalterations), and Comments. It also has a table for inspection results with columns for Code, Description, and a grid for O, P, C, N, R, F. Handwritten notes include "423 OK", "423 OK", "342 OK", and "Interior shear was verified".

**Digital Form (Right):** Titled "Building Inspection Slip - P 1". It contains fields for Confirmation # (1944), Received (05/11/2020), By (Phone), Scheduled (05/29/2020), Tract (5055), Lot (13), Address (PALM SPRINGS CL SAN JOSE), Contact (SAM), Phone ((831) 801-3171), Owner (GARCIA-DIAZ ELGIN), Contractor (BEPM100%), Subtype (Single Family), Work Proposed (Additions/Alteration), and Comments. It also has a table for inspection results with columns for Code, Description, and a grid for O, P, C, N, R, F. The digital form includes a "DRAFT" watermark and a "Submit It:" button.





# - Electronic Plan Review

## Operational Impact from SJePlans

### Application Submission

Save time and money printing large plans and bringing them to City Hall

### Plan Processing and Triage

Plan Review Staff save time processing applicants and triaging to review groups.

### Comment Coordination

Comments collected from all Development Service Reviewers and shared with the Customer in one organized platform.

### Plan Review & Markup

Staff can compare previous plans to identify changes and make mark-up to plans that are available to customer immediately.

### Project Coordination

Document organization in SJePlans reduces confusion about document management and latest version between review groups and the Customer.

### Phase 1

*Aug 31, 2020*

**Public Works  
Permits**

**Planning Major  
Permits**

*Special Use, Condition Use,  
Site Development, Planned  
Development Permit*



### Phase 2

*2021*

**Fire Prevention  
Permits**

**Building Permits**





# - Preparing for PW & Planning Launch



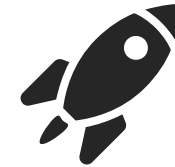
## Staff Training

- ☒ 24 Training Sessions
- ☒ 120 Hours of Training
- ☒ 170 Staff Trained
- ☒ ## Internal Videos Created
- ☐ Internal Virtual “Drop In Sessions” – Week of Aug 24



## Applicant Engagement

- ☒ Applicant/Customer Pilot Workshop – August 13
- ☒ Community Workshop – August 14
- ☐ Applicant Guides Created
- ☐ SJePlan Resource Website
- ☐ Applicant “Drop-In Sessions” – Week of August 24



## Go-Live Activities

- ☒ User Acceptance Testing
  - ☒ 112 Issues Found – 107 Resolved
- ☒ Deployed AMANDA related changes
- ☒ Production Test – Saturday Aug 22
- ☐ Customer Pilot – Week of Aug 24
- ☐ Public Go-Live – August 31



# Development Services Transformation Q3 2020 (July - Sept.)

## Objectives

Simple, Self-serve, Digital User Experience

Clear, Consistent, Effective Process

Strong, Collaborating Team

Great Internal Tools to Enable Teamwork

## EXTERNAL

## INTERNAL

## Key Results

- ☐ Launch new Online Permitting Portal (SJPermits 2.0)\*
- ☐ Develop and Publish User Guide(s) for Electronic Plan Review Portal
- ☐ 60% ADU Permits issued within 2 review cycles\*

- ☐ Update Annual Fee and Charges updates for FY20-21 Development Services
- ☐ Train Internal Users for Planning and Public Works Electronic Plan Review Workflows
- ☐ Report on Remote Work and Technological Requirements during COVID-19
- ☐ Launch Electronic Plan Review for 5 Planning and 15 Public Works permits
- ☐ Sign-Off of Fire's Electronic Plan Review Requirement Document and Complete Configuration\*
- ☐ Complete Requirement Document for Building Electronic Plan Review Process and complete 50% of Configuration\*
- ☐ Develop Fire and Code Enforcement digital inspections form and start end-user testing

\*brought forward or adapted from a Q2 Key Result