



Memorandum

TO: SMART CITIES AND SERVICE IMPROVEMENTS COMMITTEE
FROM: Rosalynn Hughey
SUBJECT: INTEGRATED PERMITTING SYSTEM UPDATE
DATE: September 22, 2020

Approved

Date

23 September 2020

RECOMMENDATION

Accept the written update of the Integrated Permitting System's (AMANDA) implementation including scope, approach, major milestones, status, challenges, and next steps.

BACKGROUND

The original IPS implementation schedule, developed in November 2016, targeted completion of the project over a period of 28 months (by March 2019). In May 2018, when it appeared that the project implementation schedule was not going to be met, the City contracted with Gartner, Inc. to conduct a "health check" technology audit and make summary recommendations on how to reset the project to achieve a successful outcome. Upon conclusion of the audit, Gartner made the following key recommendations: 1) adopt an agile methodology for software implementation, 2) focus on the highest priority requirements that can be tied to clear, measurable business value for the City to deliver a minimum viable product within 2 - 3 sprint cycles, and 3) implement changes to the Team to ensure a focused approach and dedicated members.

Following the Gartner assessment, the Development Services Partners (Partners) restarted the project with a new approach and rebranded the work as the Development Services Transformation. The Partners established a new Transformation Team consisting of dedicated cross-departmental staff and vendor partners to get the project back on track. The Transformation Team uses an agile scrum approach to "chunk" out the work and swarm resources around key priority areas. Key priority areas are developed as Objectives as measured by Key Results (OKRs).

Central to the new agile approach is a new governance structure. The new governance structure allows the Team to move quickly on decisions that had previously limited forward progress and includes oversight by an Executive Committee composed of department directors

who assist the Team by setting strategic direction, clearing roadblocks, and helping to resolve issues more expeditiously

ANALYSIS

The Development Services Transformation Team has accomplished significant milestones since the last report to the Smart Cities and Service Improvements Committee in June 2019. The most significant of these accomplishments has been the November 4, 2019 launch of the upgraded AMANDA system, the software that facilitates development review and permit issuance by the City.

There are nearly 800 active users of the AMANDA system across five departments: Planning, Building and Code Enforcement, Public Works, Fire, Transportation, and Environmental Services. Upgrading the AMANDA platform entailed:

- Taking old, archaic systems and servers that were no longer serviceable offline and moving hundreds of thousands of files to new servers;
- Installing new cloud-based GIS and electronic content management systems;
- Upgrading the AMANDA database from version 6 to version 7;
- Implementing the businesses processes of several divisions into AMANDA 7 automated workflows; and
- Improving the integration with 19 related systems, such as the City's financial system.

The AMANDA upgrade was a critical milestone that enabled the future improvements envisioned by the original scope of the IPS. One of those improvements was the integration of an electronic plan review software (ProjectDox). During the first half of 2020, the Transformation Team worked with an outside vendor to configure the software which culminated in the first phase launch of the new SJePlans website on August 31, 2020. The first phase of SJePlans has allowed customers to submit plans online for any Public Works permit (excluding parkland, transportation analysis, and minor public utility permits) and for five key Planning permit applications including:

1. Site Development Permit/Amendment
2. Conditional Use Permit/Amendment
3. Special Use Permit/Amendment
4. Planned Development Permit/Amendment
5. Variance/Exception

This new service will provide benefits for permit applicants and City staff. Permit Applicants will save time and money by no longer having to print large plan sets and spending time going to City Hall to submit them. They will also gain greater insights into the review process of their applications with clarity of which specific review, comment, or plan mark-up needs their attention.

Development Services staff will greatly benefit from the software's workflow and organization features saving innumerable administrative processing hours in the permit application process. With a single location for applicants to submit files, plans will automatically be triaged to the appropriate reviewers eliminating the needless administrative time ensuring paper plans are in the right hands. Every project reviewer can upload their comments and markups in the software for seamless consolidation for both the lead reviewer and the customer. Each comment, on each version of the plans, can be traced to the reviewer for quicker communication and identification of any issues with a permit application. Finally, staff can use the software to compare any changes on resubmittal plans with previous versions, automatically allowing the reviewers to focus on the updates and not having to re-review already approved aspects of the plans.

Another milestone in the Development Services Transformation roadmap was the deployment of the Digital Inspection Form for the Building Inspection group launched in April 2020. This project automates and digitizes the inspection documentation process that has improved customer access to inspection records while saving time for the inspection team. This project, previously called "mobile inspection application", is estimated to save inspectors one hour each day, save administrative staff 500 hours of printing and scanning inspection slips annually, and save \$70,000 in paper and ink each year.

The Transformation Team has implemented several other key technology improvements including the launch of seven upgraded permitting processes and the deployment of the improved imaging process for the Planning Division. The latter improvement to the imaging process saves staff time by automating the steps to get documents imaged and available for the public. It is estimated this improvement will save Planning staff over 1,000 hours of administrative work each year.

Future milestones are being worked on and scheduled to be deployed as early as October 2020. These include the launch of SJPermits 2.0, a platform upgrade of the public permitting website with similar functionality but an improved user interface. This platform upgrade will enable the deployment of version 2.1 in 2021 that will include customer-facing enhancements to the development permitting process.

Building on the successful Phase 1 launch of the electronic plan review system, SJePlans, in August 2020, the Transformation Team is preparing for the rollout of SJePlans for Fire Prevention and Building Division in early 2021. Additionally, the Team will expand the number of Planning permit types that will be available for electronic plan submission in the first half of 2021. Lastly, the Team will deploy the Digital Inspection Form for Fire Prevention building inspections. The Fire Prevention Team is expected to soft launch the digital forms later this year with a full launch expected in early 2021.

CONCLUSION

The reset of the Integrated Permitting System enabled the Development Service Partners to accomplish major milestones in their technology roadmap. The Team has continued utilizing agile methodology guiding by the Objective and Key Results determined by the Development Services Partners Executive Committee. The Partners are excited about the transformation of the City's permitting process and the positive impact for our customers.

CLIMATE SMART SAN JOSE

The recommendation in this memorandum has no effect on Climate Smart San José energy, water, or mobility goals.

COORDINATION

This memorandum has been coordinated with the Information Technology Department, Department of Public Works, and Fire Department.

CEQA

Not a Project, File No. PP17-009, Staff Reports, Assessments, Annual Reports, and Informational Memos that involve no approvals of any City action.

/s/

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