

d (2) Development Service Transformation Update

Smart Cities and Service Improvements Committee

Nov 4, 2021

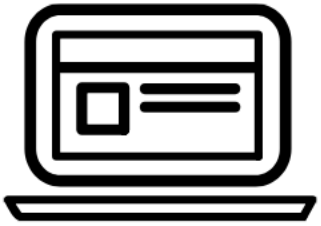
Christopher Burton, Director, Planning, Building and Code Enforcement

Alex Powell, Chief of Staff, Planning, Building and Code Enforcement



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 Q4 2021 (Oct. - Dec.)

Objectives

Simple, Self-serve, Digital User Experience



Clear, Consistent, Effective Process



Strong, Collaborating Team



Great Internal Tools to Enable Teamwork



EXTERNAL

- ☐ Complete 75% development and 50% Testing for SJPermits 2.1.0*
- ☐ Publish Housing Dashboard*
- ☐ Create Four New Guides or Demo Videos to support customer SJP v2.0 adoption

INTERNAL

- ☐ Complete 75% of configuration and 25% of testing for Planning Subdivision folder enhancements*
- ☐ Approve Dev Service Tech Roadmap
- ☐ Complete 90% of AMANDA Building folder configuration for electronic plan review integration*
- ☐ Finalize functional requirements for the replacement of CES
- ☐ 100% of Planning Initial Comment Letters have Comments Entered into SJePlans

Key Results

**brought forward or adapted from a Q3 Key Result*

Development Services

Historical
Operations

Current
Operations

Desired Future
Operations

Intake



Customer travel to City Hall, queue in Permit Center via ticket machine and wait to hand paper application to permit specialist to create their permit record.



Paper plans are reviewed, “marked up” with comments and scanned for applicant resubmittal or left of applicant pickup at City Hall.

After plans have completed their review and any necessary revisions, applicant is approved to receive their permit in-person. Permit Issuance requires final review that all fees have been paid and all processes completed.

Plan Review & Permit Issuance



Inspection



Inspectors go to City Hall to pick up inspection assignment papers, hand write inspection notes on paper and bring notices back to City Hall for scanning, processing and posting online.



Development Services:

Historical
Operations

Current
Operations

Desired Future
Operations

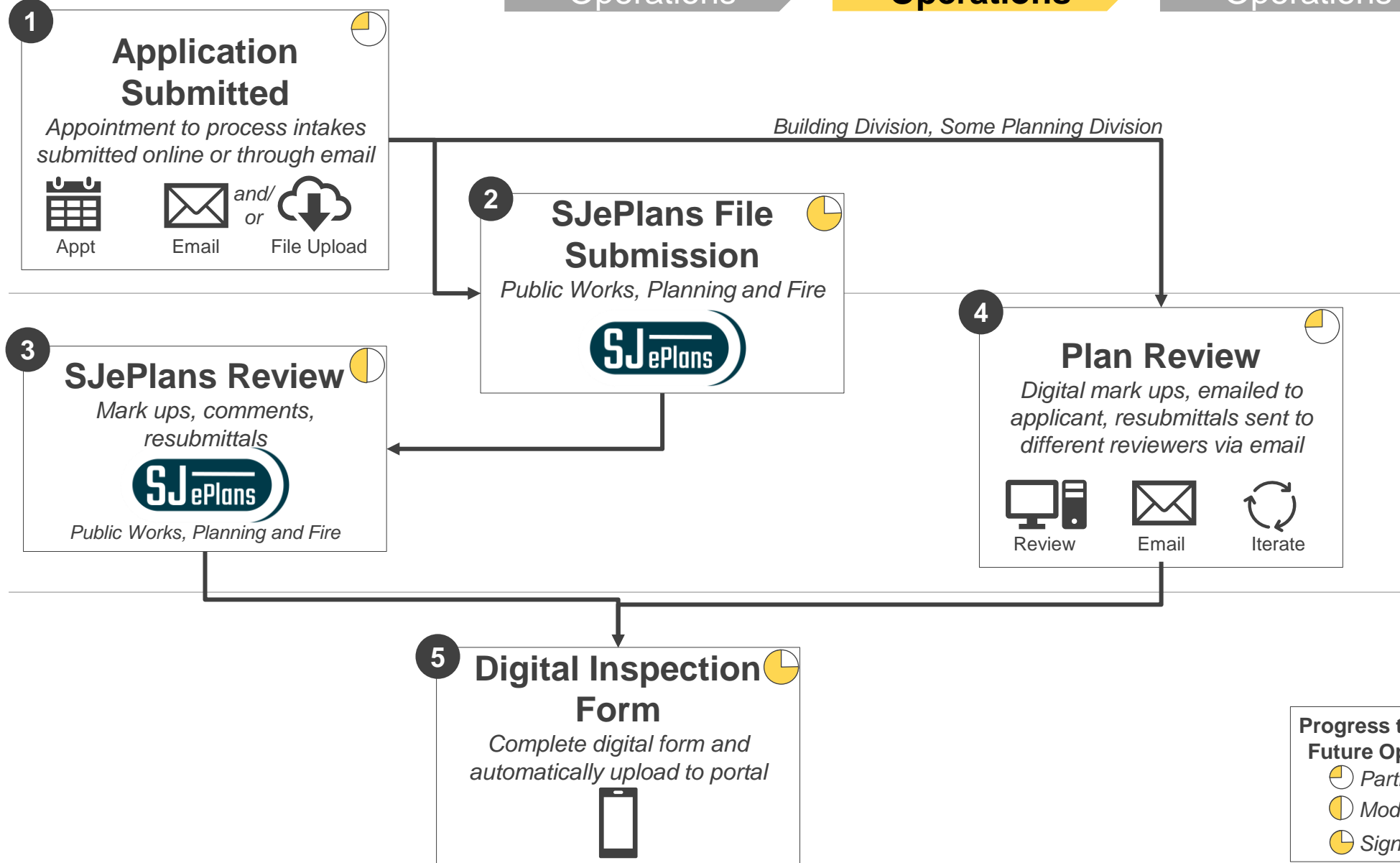
Intake



Plan Review & Permit Issuance



Inspection



Permit Center Appointments

Customers have the ability to book appointments online for virtual or in-person services

Phase 1

March 2021

Building Virtual Services

ADU Submittal

Accessory Dwelling Units

Over the Counter (OTC)

Residential Alt/Add with no major structural changes

Plan Review Service

New construction or remodels with structural changes

Simple Projects

Appliance installations, electrical and plumbing projects, reroofing, or similar projects with no structural changes

Virtual

Phase 2

August 2 – Permit Center Reopened to the Public

Fire Prevention Submittal and Support

Application Submittal and Support

Planning 1st Floor

Application Submittal

Public Works 1st Floor

Application Submittal and Support

Virtual (New)

Fire Prevention Submittal and Support

Application Submittal and Support

Planning 1st Floor

Application Submittal

Public Works 1st Floor

Application Submittal and Support

In-Person

Finance

Cashier, Business Tax, Accounts Receivable, Utility Bills

Building

Simple or Over-the-Counter Projects, Inspector Questions and General Info

Total Output

Virtual Appointments Held

6,000

In-Person Customers Served

2,000





Electronic Plan Review

Operational Impact

Digital Application
Submission

Plan Processing and
Triage

Digital Plan Review &
Markup

Comment Coordination

Daily Activities in SJePlans

Oct 5, 2021

404  Files Uploaded

178  Mark Ups

124  Comment Responses

1,363  Emails

Permits Processed in SJePlans

All Time

3,174 156 843

Public Works

Planning

Fire
Prevention

Time to Permit Issuance Changes

 15%
Days

Public Works

 29%
Days

Fire Prevention

✓ Phase 1

Public Works and
Planning

August 2021



✓ Phase 2

Fire System Folder And Public Works
and Planning Upgrade to 9.2

March 2021



Phase 3

Building Folders

Summer 2022

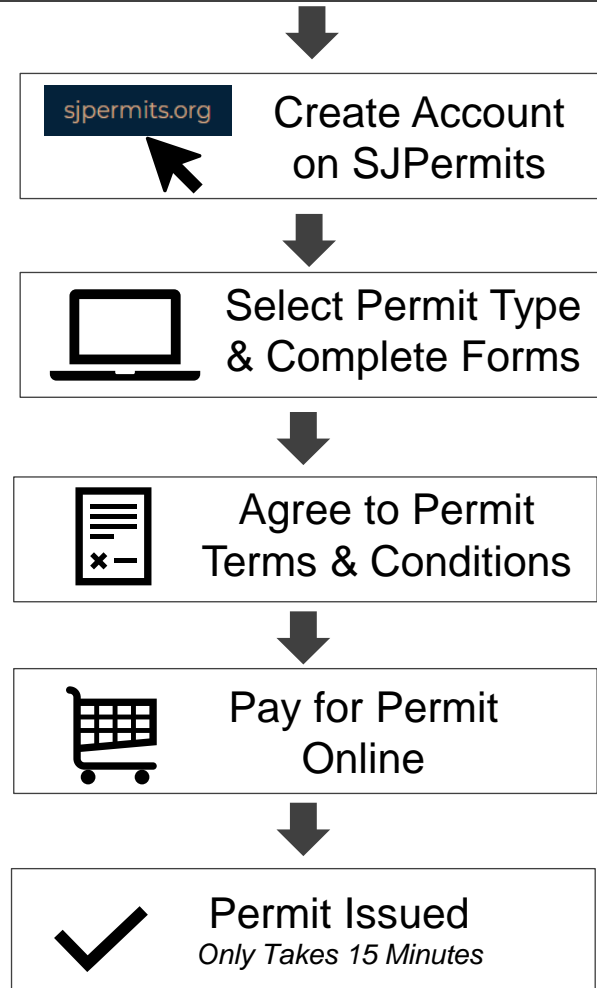
Status

SJPermits – Online Building Permit Portal

SJPermits.org Existing Features

- Self-Administer Building Permits
- Schedule and Pay for Building Inspections
- Pay for Permit Fees
- Search for Permit Status, Information and Documents
- Code Enforcement Residential Occupancy Program Tier 1 Self-Certification

SJPermits Online Self-Administered Permits



SJPermits – New Online Permits Available

Currently 54 permits
available for
self-administration on
SJPermits.org
(list includes new permits)

	New Permit Type Available Online	Permits Since Launch	Launch Date
1	Stationary Battery Installation	1,656	Sept 2020
2	Brace and Bolt Earthquake Retrofit	407	Sept 2020
3	Damage Survey Inspection	59	Feb 2021
4	Historic Inventory Permits	114	Mar 2021
5	Temporary Power Pole	91	Mar 2021
6	Tankless Water Heater	7	April 2021
7	Electric Subpanel for Commercial and Multifamily	17	May 2021
8	Minor Kitchen and Bath Remodels	30	Oct 2021



Estimated Staff Time Savings: 1,500 Hours Each Year



SJPermits – New Portal Launch

Nov 2020

“Soft Launch” of SJPermits v2.0

Created transition process for customers to migrate accounts and adopt new portal

April 2021

Full Transition to SJPermits v2.0

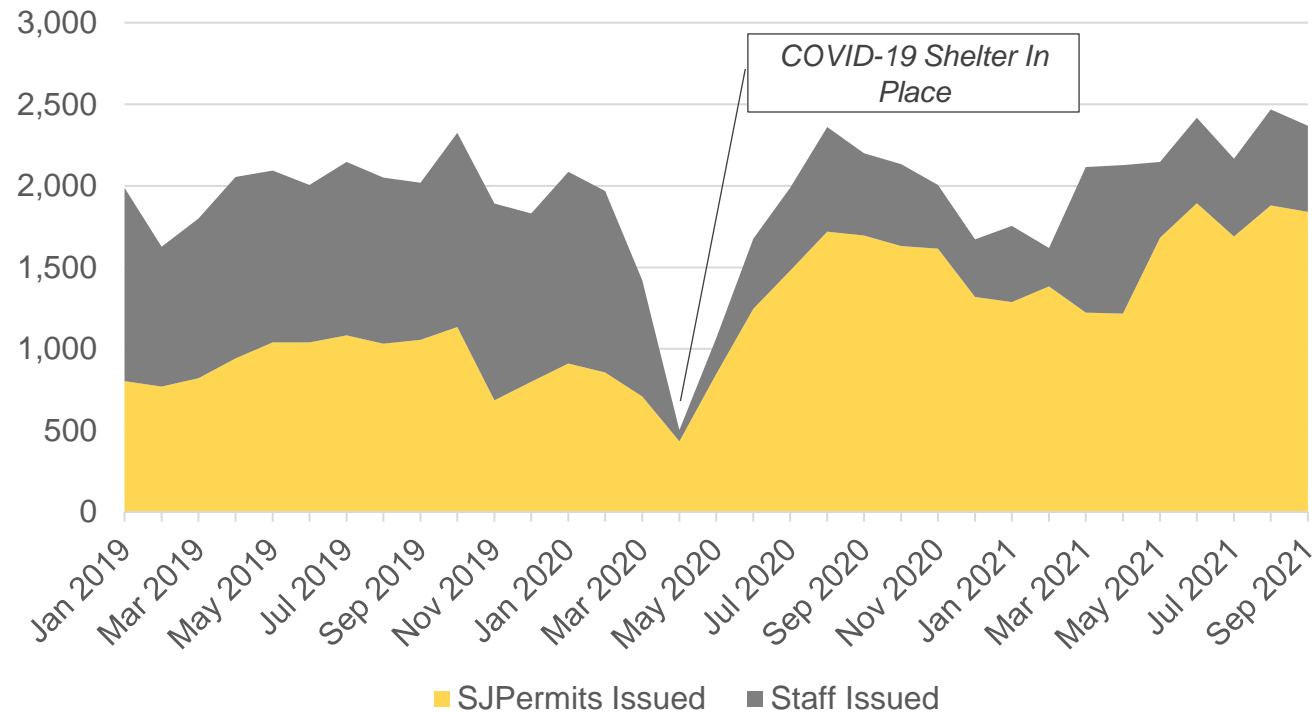
Removed access to old portal requiring all users to use new portal and migrate account.

June 2021

1,894 Permits Issued Online

Record for permits issued online. Aided by new permit types available.

Building Permits Issued
Online vs Manual



Development Services:

Historical
Operations

Current
Operations

Desired Future
Operations

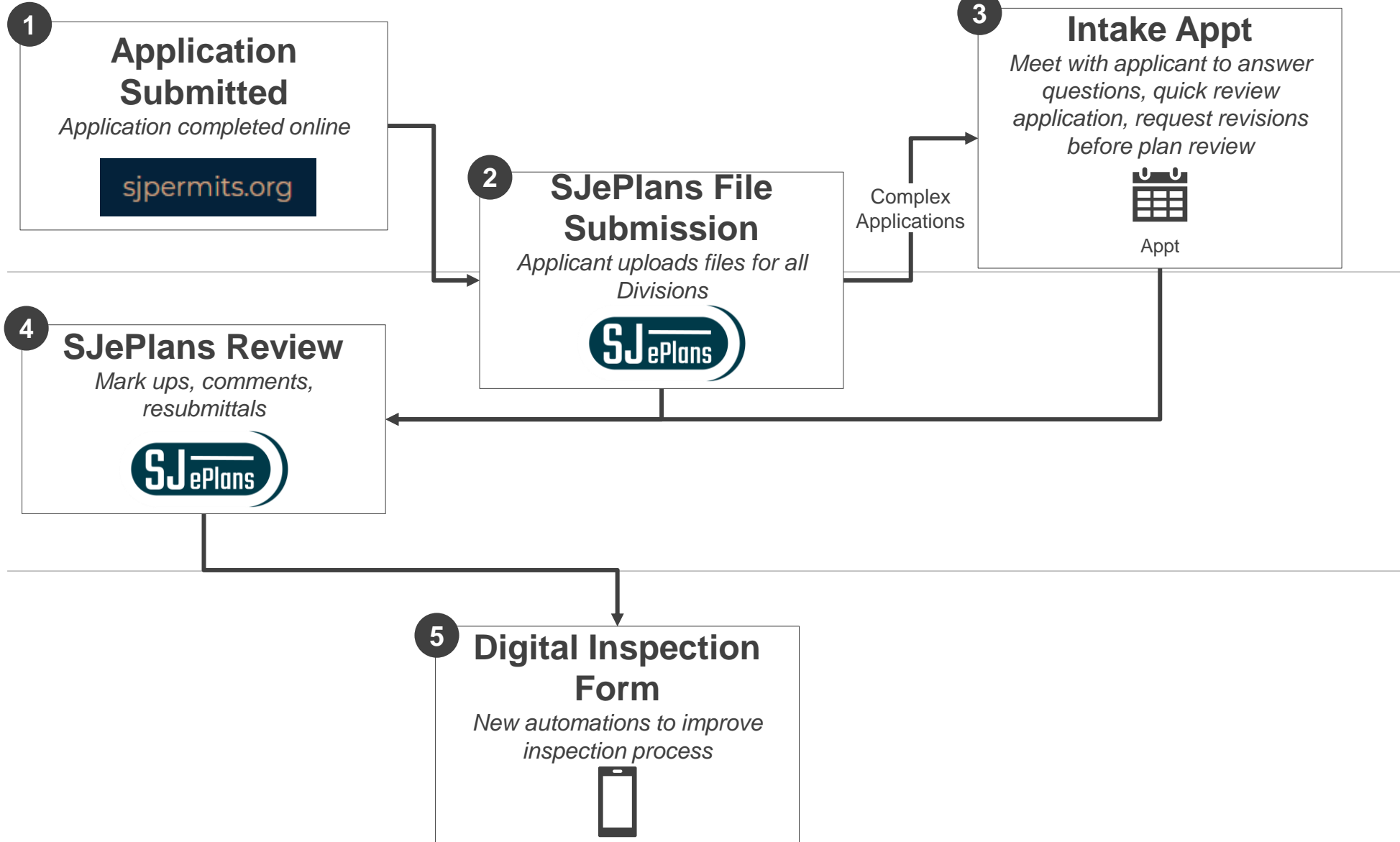
Intake















































Plan Review & Permit Issuance

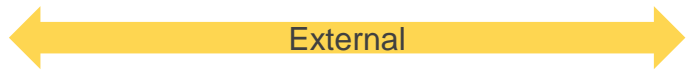


Inspection



Transformation Look Ahead

Project	Est. Objectives Impact	Status	Next Steps
SJPermits v2.1 Start Application Online	             	✓ SJPermits v2.0 ✓ 8 New Self-Admin Building Permits Types	<input type="checkbox"/> Complete Development for v2.1.0 – January 2022 <input type="checkbox"/> User Acceptance Testing for v2.1.0 – February 2022 <input type="checkbox"/> Deploy Start Application – Spring 2022 <input type="checkbox"/> Application Wizard – Summer 2022
SJePlans Building Division	              	✓ Public Works ✓ Planning – 6 major types ✓ Fire Prevention	<input type="checkbox"/> Complete AMANDA Permitting System Modifications – January 2022 <input type="checkbox"/> Complete SJePlans Configuration – Summer 2022 <input type="checkbox"/> Launch Building SJePlans – Fall 2022
Permit Center Appointments Rapid Intakes	              	✓ Virtual Appts ✓ 100% Partner Adoption ✓ Permit Center Reopened	<input type="checkbox"/> Develop New Service Line Appoint System – Early November <input type="checkbox"/> Deploy Website for New Process – Mid November <input type="checkbox"/> Launch New Rapid Intake Process – Late November



Customer Digital Experience



Clear Process



Collaborative Team



Internal Tools

Impact Key

Significant Impact

Moderate Impact

Small Impact

Negative Impact

No Impact

Questions

Back-Up Slides

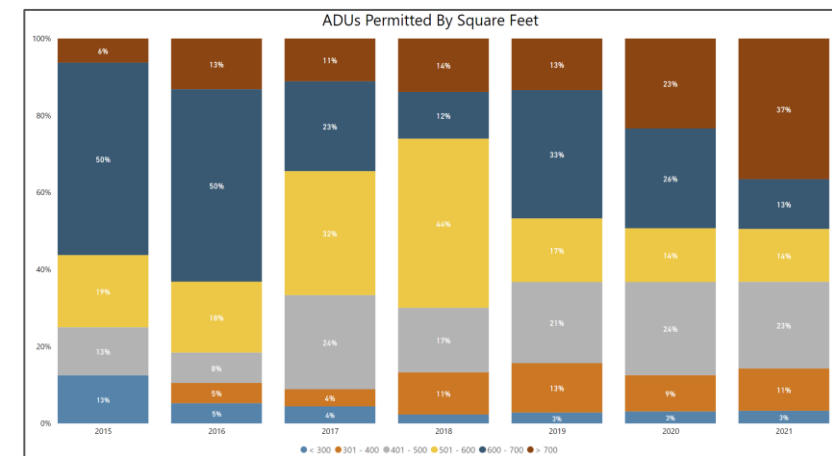
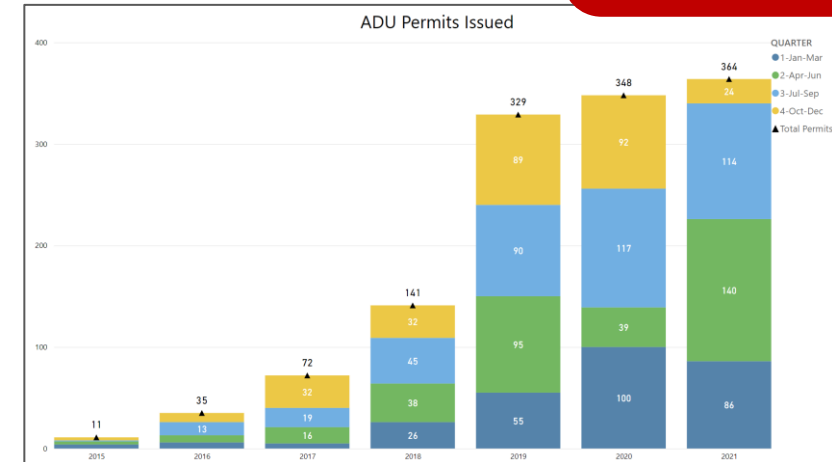
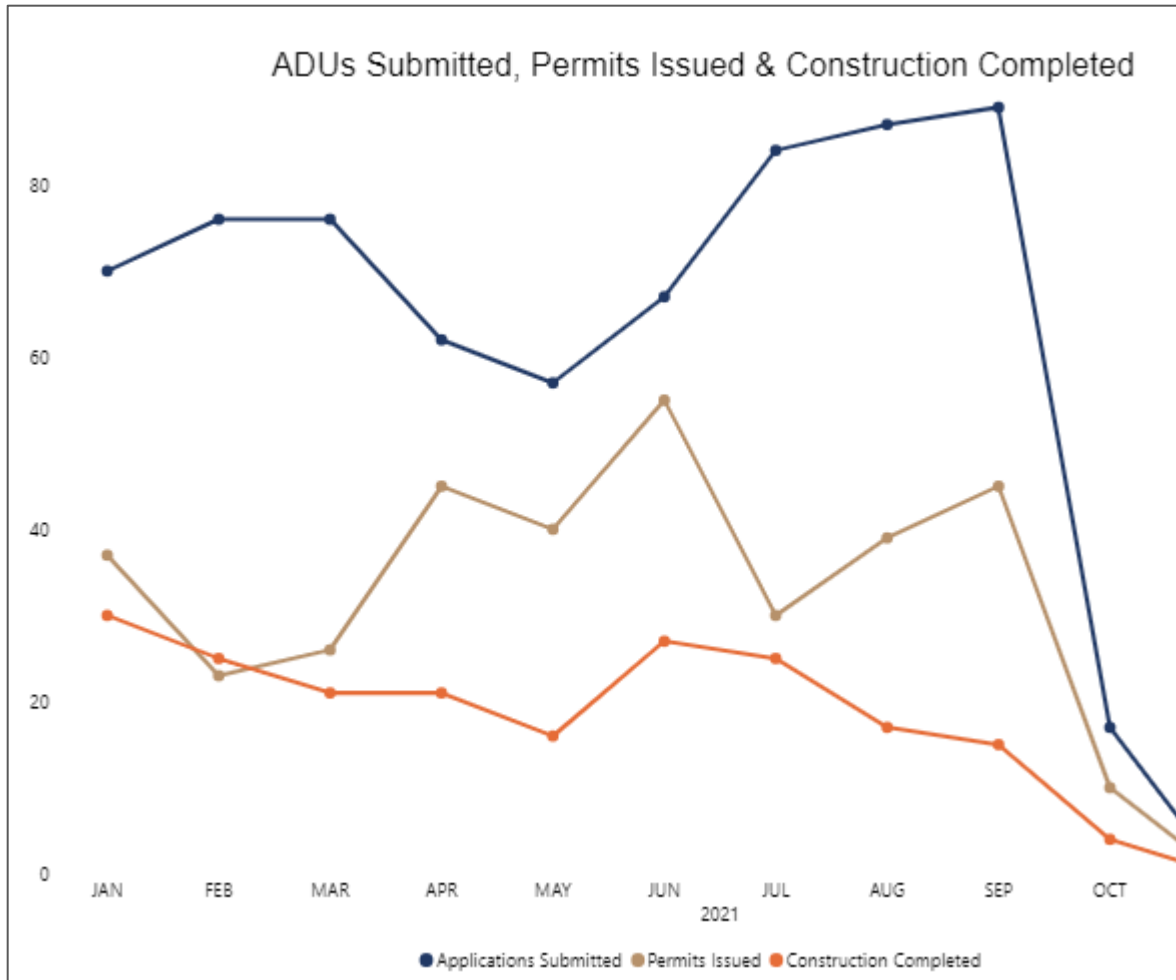
11/4/21 – Smart Cities Presentation Potential Topics

Good News	Good/Bad News	Bad News
<ul style="list-style-type: none">• Fire Electronic Plan Review• Fire Digital Inspection Form• SJPermits v2.0 Launch<ul style="list-style-type: none">• Online Permit Numbers• New Building Permit Types on SJPermits• ADU Dashboard• Automate Imaging	<ul style="list-style-type: none">• Qmatic Appointments Available<ul style="list-style-type: none">• - Appt Delay• + Reopened Permit Center• + All Partners available<ul style="list-style-type: none">• + New virtual appts available online• + New Building Rapid Intake Process (Oct Launch)• Imaging Positions Not Needed• ProjectDox 9.2 Upgrade• PBCE-IT in ITD	<ul style="list-style-type: none">• IT Staff Resources• Building ProjectDox• SJPermits v2.1 – Contact Amendment• ADU Performance• SJePlans Planning Phase II

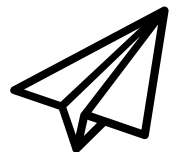


ADU Dashboard, other Improvements

Potential to
Remove this Slide



TBD Future Slide One Day



Measurable Outcomes

(Not Communication. Need Something Better)



Project Days



Staff Hours

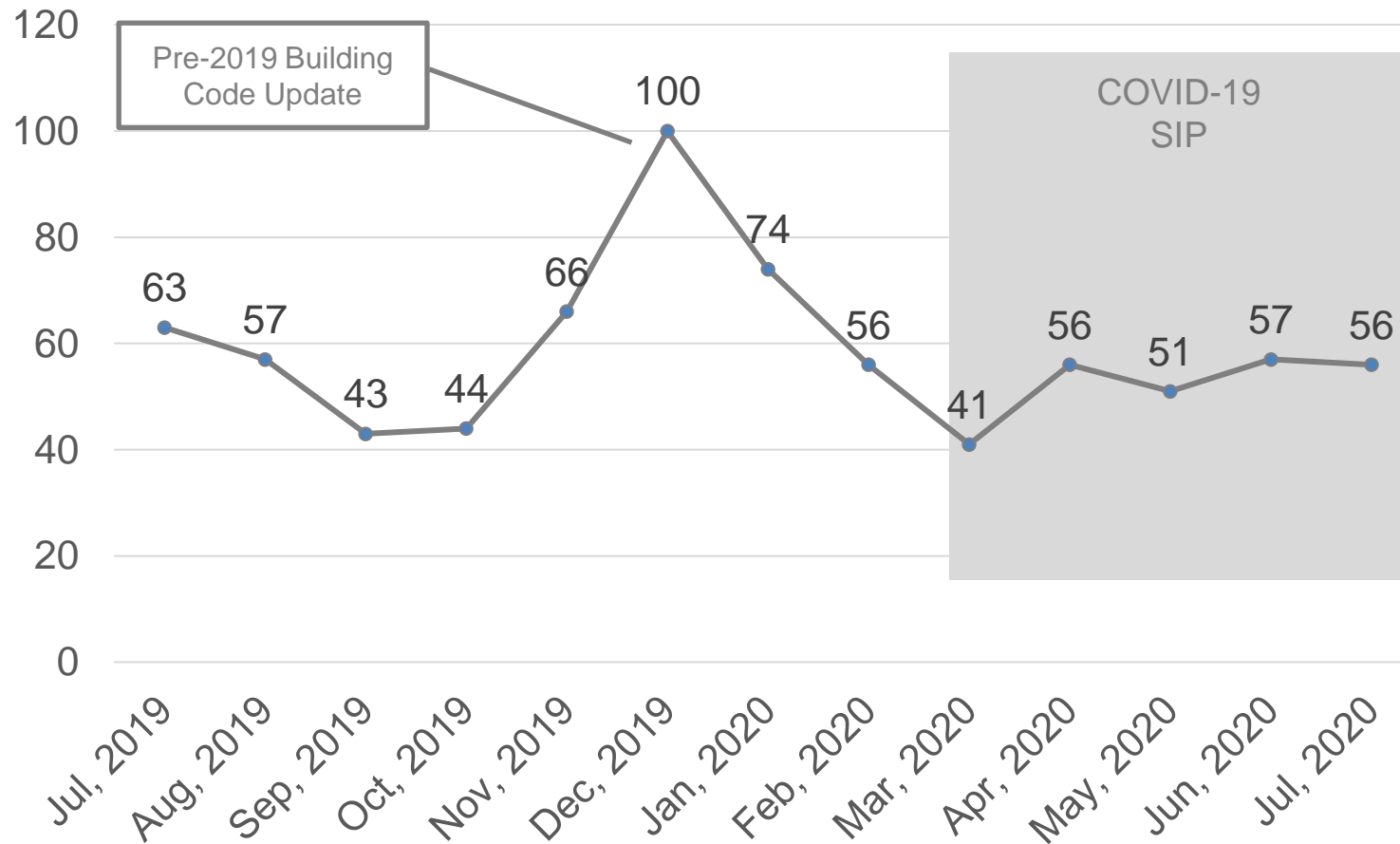


Communication
& Clarity

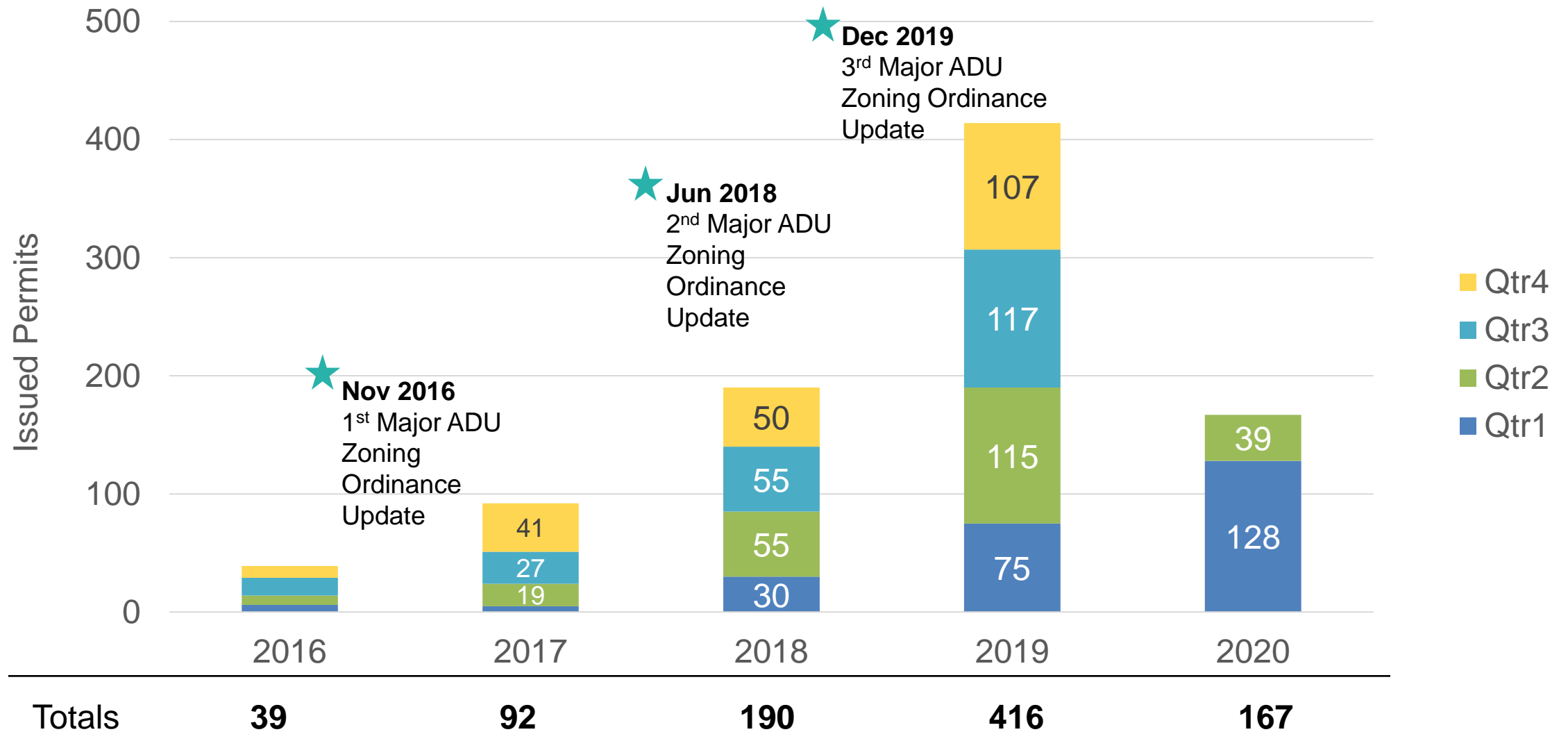


ADU Permit Applications

ADUs Applications Submitted
Past 13 months



Permits Issued Since 2016



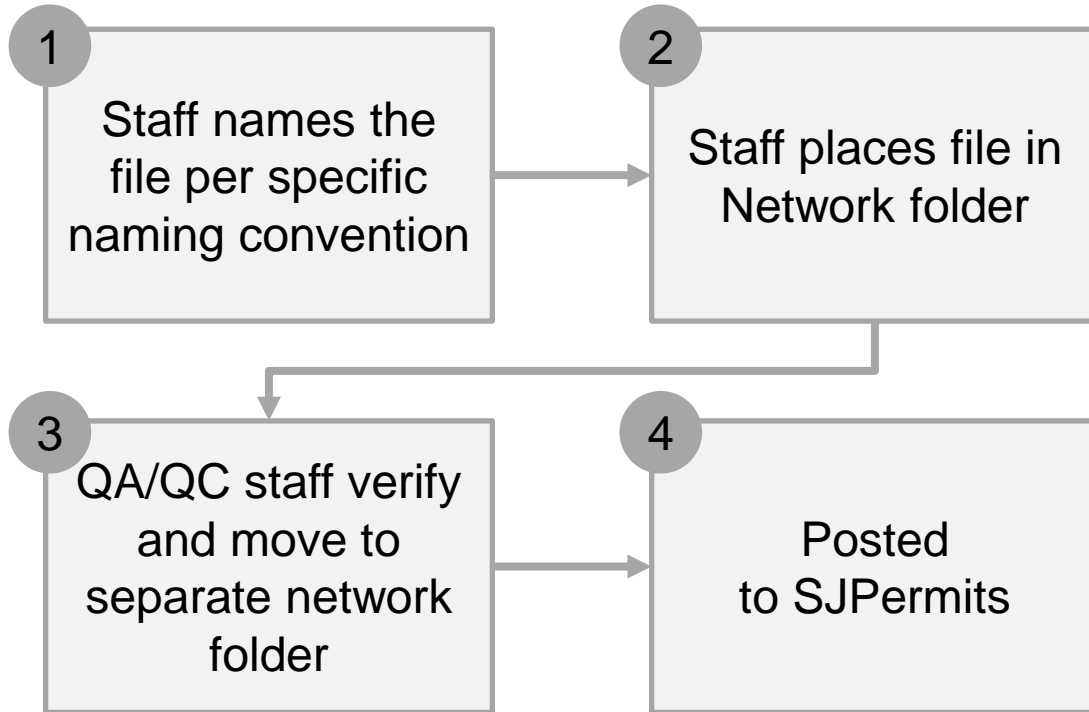
Fire Implements Digital Inspections

- No more waiting for scanning to get results
- No more worry of losing paper or failure of scanner to read inspection
- Readable Notes
- Dell 7210 Device has access to Firehouse, Amanda, SJePlans, Bluebeam cloud and other applications



Automate Imaging

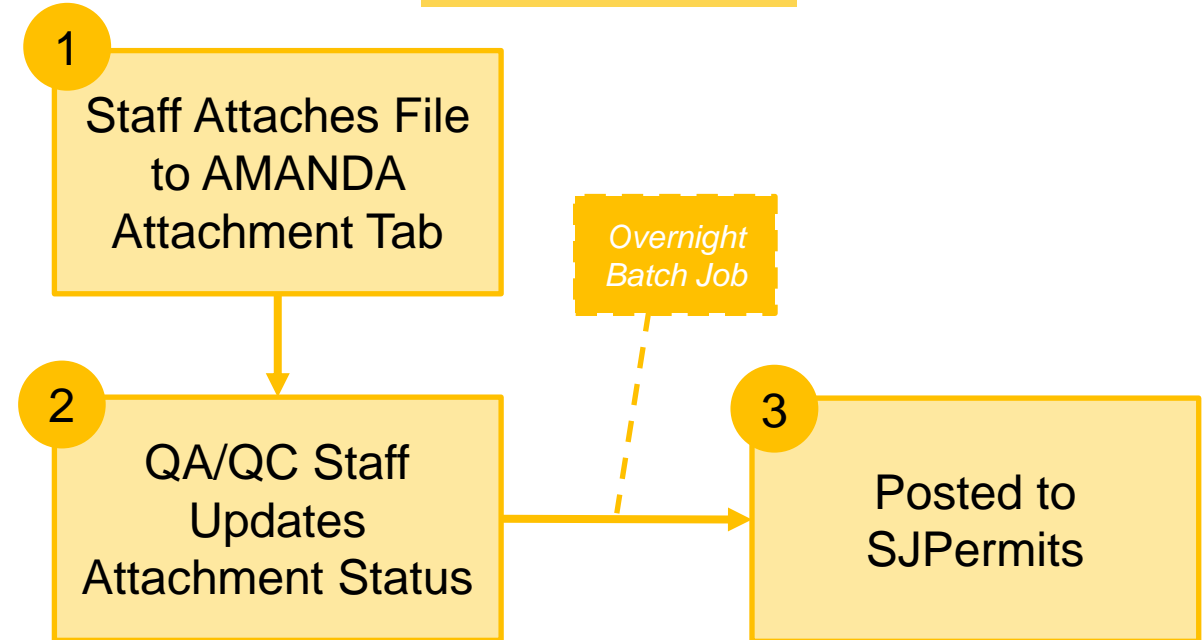
Dec. 2019 New Method



- **Prep Time:** 30 minutes to 1.5 hour per project
- **Lag Time Between Complete Prep to Display on SJ Permits:** ~ 1 week



Imaging Today

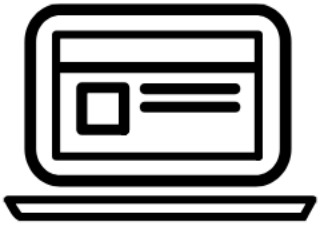


- **Prep Time:** 10 minutes or less
- **Lag Time Between Complete Prep to Display on SJ Permits:** 1-2 days

Available for PW, Bldg and PL on February 22nd



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

Where we've been...

Environmental Consultant List Published – July 2019

Established list of pre-qualified consultants.

Launched Six New AMANDA Workflows – October 2019

Approved Trips Inventory, Utility Folder, 2 Special Districts Folders, Single Family, Tree Removal.

AMANDA 7 Upgrade – November 2019

Launched major upgrade of Permitting System, platform for future enhancements.

Improved Imaging Process for Planning – January 2020

Streamlined document publishing process, saving hundreds of staff time per year.

Digital Inspection Form Launched (Building) – April 2020

Enables Inspectors to complete forms digitally for clean reporting and instant access for customers.

Fire Engineering AMANDA Workflow Launched – April 2020

Significant upgrade to AMANDA folder enabling future integration into SJePlans.

SJePlans Launched for Public Works & Planning – August 2020

Electronic plan review software launched for Public Works permits and 5 major Planning permits



CEQA Process Improvements

California Environmental Quality Act (CEQA) - Environmental Review Process for Development Projects

Clear, Consistent,
Effective
Process



- Eliminated practice of “Fire Wall” for CEQA documents, so applicants will have information to alter design to reduce mitigation
- Developed a short-list of pre-qualified CEQA consultants from which applicants can choose
- Conducted Staff training on CEQA basics and advanced CEQA concepts
- Established better quality control/quality assurance of documents
- Launched Environmental Consultant Roundtable

Planning Imaging

Old Method

1.9 PROJECT DESCRIPTION

1.9.1 Existing Site Conditions

The 10.6-acre project site is primarily vacant undeveloped land that was previously utilized for agricultural operations. A single-family residence with an attached garage, and associated ancillary agricultural buildings including four barns and two sheds, were located in the southeast corner of the project site. The ancillary agricultural buildings, which were extremely deteriorated and vacant for many years, were destroyed in a fire in May 2016. The barn and associated agricultural structures were demolished and removed in July/August 2016 and the single family home is currently in the process of being demolished and is expected to be removed from the site by the end of October 2016.

1.9.2 Site Development

The project proposes to demolish the existing single-family residence and remnants of the former agricultural buildings in order to develop the site with 188 residential units and up to 108,000 square feet of commercial/office uses.

1.9.2.1 Residential

The project proposes to construct 188 residential units, consisting of three-story townhomes, each containing between two to four bedrooms and a two-car garage.

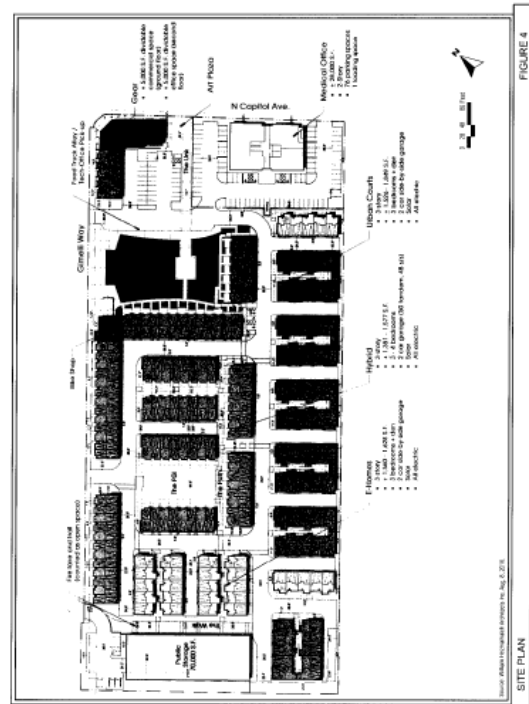
Residential units will vary in size and contain between 1,476 and 1,955 square feet of residential space.

1.9.2.2 Medical Office

The project includes the construction of a two-story medical office building containing up to 28,000 square feet of space in the southeast portion of the project site, along N. Capitol Avenue. The facility would include 77 surface parking spaces.

1.9.2.3 Commercial

The project also includes the construction of a 70,000 square foot self-storage warehouse facility, located along the western boundary of the project site, directly adjacent to Interstate 680. The facility would include 17 surface parking spaces. Approximately 10,000 square feet of additional commercial space would also be constructed in the northeast corner of the project site at the corner of Gimelli Way and N. Capitol Avenue, which would consist of up to 5,000 square feet of dividable commercial space on the ground floor and up to 5,000 square feet of office space on the second floor. The facility would include 27 surface parking spaces. A conceptual site plan is shown on Figure 4.



641 N. Capitol Mixed-Use Project
City of San Jose
Initial Study/Draft Mitigated Negative Declaration
October 2016

- **Prep Time:** 2-4 hours per project
- **Lag Time Between Complete Prep to Display on SJPermits:** 4-8 months
- **Quality:** black and white images, non-searchable PDF Docs

New Method

1.9 PROJECT DESCRIPTION

1.9.1 Existing Site Conditions

The 10.6-acre project site is primarily vacant undeveloped land that was previously utilized for agricultural operations. A single-family residence with an attached garage, and associated ancillary agricultural buildings including four barns and two sheds, were located in the southeast corner of the project site. The ancillary agricultural buildings, which were extremely deteriorated and vacant for many years, were destroyed in a fire in May 2016. The barn and associated agricultural structures were demolished and removed in July/August 2016 and the single family home is currently in the process of being demolished and is expected to be removed from the site by the end of October 2016.

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641 N. Capitol Mixed-Use Project
City of San Jose
Initial Study/Draft Mitigated Negative Declaration
October 2016

- **Prep Time:** 30 minutes to 1.5 hour per project
- **Lag Time Between Complete Prep to Display on SJPermits:** ~ 1 week
- **Quality:** Color, searchable PDF Docs

Time savings: ~75 hours to 150 hours saved per month for all planning staff
(assumption is 2.5 projects completed per month per staff for 20 planners)



- Electronic Plan Review

Operational Impact from SJePlans

Application Submission

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

Plan Processing & 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

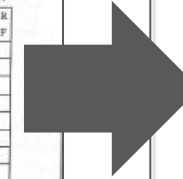


Digital Inspection Form – Building

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

BUILDING INSPECTION NOTICE
B-4, Complete; E-4, Complete; F-4, Complete
Permit #: 19-123538-MF
LI: Thomas Schneller
Supervisor Tel:
Confirmation #: 01820346 Received: 05/18/2019 By: Phone: Scheduled: 07/02/19
Tract: 8895 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/A alterations
Comments:
Related Permits:
Insp Time: 1:30 Inspection time listed at the left includes 10 minutes travel time.
Number of Units: 1 Time inspection completed:
Code Description OK P C N R F Code Description OK P C N R F
413 Electrical Rough X
928 Plumbing Final X
948 Building Final X
423 Shower PAU X
342 Interior Shear X
Remarks: 423 OK 423 OK
342 OK Interior Shear was verified
You have a total of 0.29 hour(s) remaining on this project as of Monday, July 01, 2019 2:06:34 PM.
Inspector's Signature: [Signature] Print: CRISTIAN Date: 07/02/19 Page: 1 of 1
City of San Jose Inspection Request Voice: (408) 535-3555 Please Return For Your Records Field Copy



DRAFT
Building Inspection Slip - P 1
RS MF CI New Add/AR-B E P M
Permit: 19-123538-RS
LI: Robert Cardenas
Supervisor Tel: 408 535-7743
Confirmation #: 1944 Received: 05/11/2020 By: Phone: Preferred: Scheduled: 05/29/2020
Tract: 5055 Lot: 13
Address: 0044 PALM SPRINGS CL SAN JOSE
Contact: SAM Phone: (831) 801-3171 Owner: GARCIA-DIAZ ELGIN
Contractor: (BEPM100%) GARCIA ADDITION Subtype: Single Family Work Proposed: Additions/Alteration
Folder Name: (BEPM100%) GARCIA ADDITION Subtype: Single Family Work Proposed: Additions/Alteration
Comments:
Related Permits:
Code : Description OK P C N R F Code : Description OK P C N R F
245 : Ulf Frame* [Status] Pending new pier posts.
444 : Rough Frame* [Status] Not ready.
345 : Roof Structure/Hall* [Status] Complete structural details D2/ 2, 3 & 6. Plan calls for rafters at 16" o.c., EOR to approve changes. Min 10 nails at new rafter to existing rafter at ridge, per detail. Roof nailing okay, spot checked this time only.
341 : Exterior Shear/Bracing* [Status] HD's undersized, plans call for hdu4's. Clip to eve blocks to schedule 12" o.c. Tighten nailing 3:12. At rear add strap where top plate cut.
928 : Plumbing Final [Status]
938 : Mechanical Final [Status]
141 : Footing [Status]
Hours Remaining: You have a total of 3.49 hour(s) remaining on this project as of 29-MAY-2020
Inspection Time Taken*: 1 0 Num Of Units Inspected: 1 Submit It:
Version: 1.22 Batch #: MAY292020070334 Cancel Inspection:

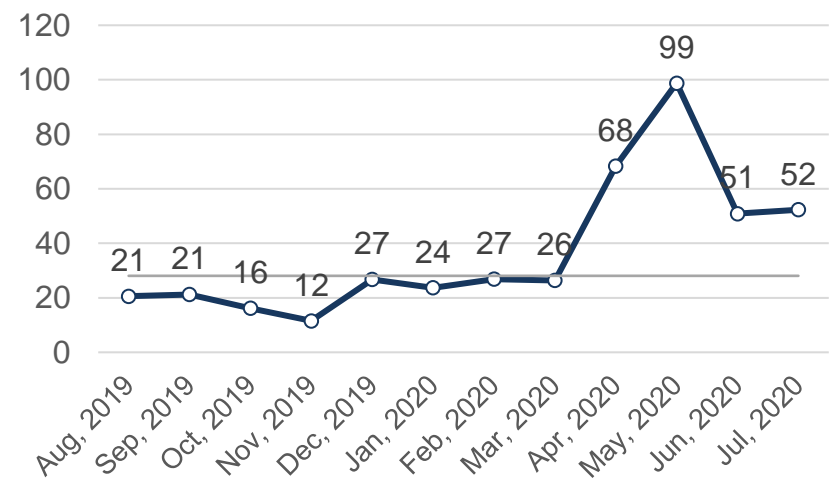
Building Permit Issuance – Time to Issuance

Home Additions/ Alterations

Aug '19-July '20

4,118 Permits

Days to Permit Issuance

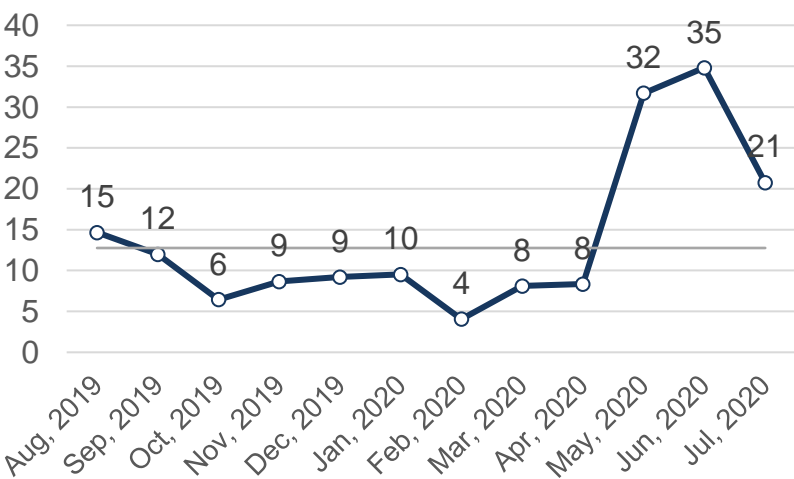


Tenant Improvement

Aug '19-July '20

1,079 Permits

Days to Permit Issuance

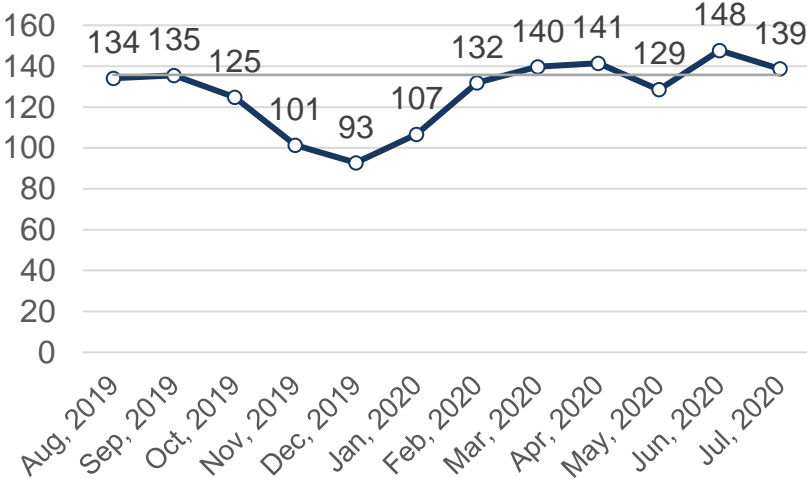


New Construction

Aug '19-July '20

596 Permits

Days to Permit Issuance



Where we're going...

SJPermits 2.0 Launch – Mid-October 2020

Replatforming of SJPermits portal to enable future enhancements with v2.1.

Fire Prevention Digital Inspection Form – Early 2021

Inspectors complete notices digitally for clean reporting and instant access for customers.

SJePlans Fire Prevention Launch – Early 2021

Electronic plan review for Fire standalone reviews.

SJePlans Planning Phase II – Spring 2021

Expand Planning Permits available on SJePlans with the integration of the Subdivision Permit.

SJePlans Building Permits Launch – Spring 2021

Following re-scoping, City and Vendor prepared amended contract following governing principles.

SJPermits v2.1 Launch – Mid-2021

Utilizing the replatforming of SJPermits from October, develop future enhancements including application intake process, GIS integration, new Application Wizard, and e-plan integration.



Questions/Discussion