

UPDATE #4

9-26-2015

Contact:

David Guhin
Community Development Interim Director
(707) 543-4299
dguhin@srcity.org

On September 9 to 11, 2015, Community Development's permit intake and information counter was closed to accommodate intensive off site staff workshops. Field inspections (building and engineering) continued on a limited basis during this time.

For these workshops, the GE Work Out technique was used to maximize time and resource efficiencies, engaging staff in developing ideas and actions to accomplish improvement objectives. Management did not participate in the workshops as the intent was to empower front line staff to affect change, capitalizing on their knowledge of the process choke points and daily feedback from customers.

In an effort to minimize impacts to customers, Economic Development staff implemented a campaign to ensure broad awareness of the temporary CD office closure. Notification ads with a brief description and the website, www.srcity.org/ImproveCD, were placed in the North Bay Business Journal, and on the main page of www.PressDemocrat.com (ads linked directly to the ImproveCD page). In addition multiple announcements/reminders were posted on social media (@srbiz and @CityofSantaRosa), flyers were distributed, and the media release was sent to print and radio outlets, as well partner organizations and associations. The Santa Rosa Chamber of Commerce, North Bay Builders Exchange, The Construction Coalition, and the Engineering Contractors Association all pushed notifications out to their members via their newsletters and direct emails. This outreach campaign was successful in that very few people came to the door seeking assistance and the phones (which were answered by staff not attending the workshop) were slow.

WORKSHOP OUTCOMES

- 2 facilitation goals were established for the workshops:
 - Entitlement Review Process – identify areas of responsibility in each division or department, discuss how to resolve conflicts, and introduce role of project manager for each application.
 - Building Plan Check Process – ensure a seamless, single process with timelines based on project type.

- Common barriers to achieving these goals were identified and discussed, including:
 - Lack of current and correct information available to internal and external customers (website, print, Accela)
 - Lack of optimized software and good customer interface
 - Undefined expectations about customer service
 - Terms (vocabulary) are not consistent across permitting sections
 - Need for better training and cross training among staff
 - Need for more staff resources
 - Lack of clarity about roles and expectations of reviewers in all departments
 - Inconsistent communication between departments
 - Quality of submittals varies widely; major gaps at intake
 - Plans and applications are not distributed or returned in a timely manner

- Working in smaller breakout groups as well as with the full team, eleven strategies with corresponding actions steps were developed:
 - **Strategy 1** – Establish a single-service counter for intake and tailor service to customer needs
Desired Outcomes –
 - Better address customer needs
 - Decrease wait times
 - Ability to schedule appointments for complex processes
 - Shorter turnaround times because applications will be submitted complete

 - **Strategy 2** – Communicate development review process and requirements to customers clearly and comprehensively
Desired Outcomes –
 - Better communication with internal and external customers
 - More complete submittals, resulting in faster turnaround times
 - Consistency in requirements and process(es)
 - Gain efficiency (i.e. time, transactions customer service)

 - **Strategy 3** – Update/enhance referral communication (City departments, outside agencies, schools/HOAs)
Desired Outcome –
 - Useful, comprehensive, easy to use comments within a specified timeframe

 - **Strategy 4** – Establish electronic referral/distribution of entitlement applications and take steps towards electronic submittal of application materials
Desired Outcome –
 - Efficient referral process – Distributed more quickly, requires less paper

 - **Strategy 5** – Create an Entitlement Review Team (ERT); develop a more clear and internally collaborative process to review development projects and get to conditions and recommendation within permit streamlining timeframes

Desired Outcomes –

- Achieve stakeholder buy-in for revised entitlement review process
- Reduce overall number of meetings
- Enhance interdepartmental communication
- Meet timeframe
- Identify and support a single point of contact
- Improve customer service

- **Strategy 6 –** Develop template for completeness and preliminary issues letter

Desired Outcomes –

- A uniform template that provides a comprehensive internal checklist
- Facilitates consistent review for completeness; identifies preliminary project issues and meets the requirements of the permit streamlining act

- **Strategy 7 –** Review and update standard conditions of approval

Desired Outcome -

- Updated set of standard conditions utilized by staff to ensure consistency and to communicate requirements

- **Strategy 8 –** Establish a template for a standard Board and Commission staff report with a consistent review process based on realistic timeframes

Desired Outcomes –

- A uniform staff report template for all Council, Board, and Commission actions, facilitating preparation for subsequent hearings
- Improved quality control for reports

- **Strategy 9 –** Establish a combined public and private improvement plan project process managed by EDS (applies to new commercial, multi-residential, single lot custom homes)

Desired Outcomes –

- Allows for one submittal process and single point of contact for the project (EDS)
- Allows multiple permit issuance simultaneously (Fire, Building, Grading, Encroachment)
- Building maintains plan check and inspection within building envelope
- Engineering Development Services (EDS) performs the entitlement check and inspection duties outside the building envelope
- Fire retains inspections/review of the fire related elements
- Significantly reduces required sets of plans for customers
- Clear direction for project submittals and process timing for both customers and staff
- Better use of staff expertise in plan check and inspection process
- Improved project tracking for customer and staff
- Clarifies approval and project oversight authority
- Provides for less staff overlap and potential conflict in entitlement, plan check and inspection
- Improves turnaround time for plan check and entitlement processes

- **Strategy 10** – Ensure consistent internal turnaround times by permit type across divisions
Desired Outcomes –
 - Provide predictable turnaround times to applicant
 - Improve tracking of project status
 - Clear expectations to reviewing departments
 - Review provided by staff with greatest expertise

 - **Strategy 11** – Implement policies and procedures to optimize usage and full functionality of Accela
Desired Outcomes –
 - Reliable and consistent database of information to better serve our internal and external customers
 - Streamlined processes
-

Of these 11 strategies, four were selected for priority implementation to allow for immediate results while maintaining day to day operations of the department. Associated tasks from the Process Improvement Action Plan (PIAP) have been clustered into these strategies, allowing staff to maintain momentum on the efforts to date, and to streamline and coordinate concomitant work.

PRIORITIZED STRATEGIES

- **Strategy 1** – Establish a single-service counter for intake and tailor service to customer needs
Related PIAP Tasks:
 - 2 Expand hours
 - 3 10 minute wait time
 - 4 Monitor wait times
 - 5 Assign receptionist
 - 34 Customer Experience
 - 35 Queuing system

- **Strategy 2** – Communicate development review process and requirements to customers clearly and comprehensively
Related PIAP Tasks:
 - 16 Pre-application meetings
 - 19 Universal application
 - 40 Pre-application CEQA
 - 42 One sheets
 - 54 Counter tech-Planner meetings

- **Strategy 5** – Create an Entitlement Review Team (ERT); develop a more clear and internally collaborative process to review development projects and get to conditions and recommendation within permit streamlining timeframes

Related PIAP Tasks:

- 9 Permit streamlining
- 10 Entitlement project manager
- 16 Pre-application meetings
- 18 Early int. department review

- **Strategy 11** – Implement policies and procedures to optimize usage and full functionality of Accela

Related PIAP Tasks:

- 32 Require use of Accela
- 33 Accela tracking/reporting
- 55 Accela coordinators
- 56 Accela policies/procedures
- 57 Optimize progress
- 58 Standard lexicon
- 59 ACcela training
- 60 Accela use monitoring

For more information on the
Community Development Process Improvement Action Plan,
which stems from the Management Partners Report:

WWW.SRCITY.ORG/IMPROVECD

The Action Plan is a significant step toward achieving process improvements
in the Community Development Department. The plan focuses on:
customer service | process and technology | partnerships