

# PROCESS IMPROVEMENT ACTION PLAN (PIAP)

## #1 – Integrated Service Counter (ISC)

*Goal: Establish an integrated single-service counter for intake and tailor service to the different levels and types of customer needs.*

## #2 – Improve Communication (ICOM)

*Goal: Communicate development review process and submittal requirements to customers clearly and comprehensively.*

## #3 – Pre-Application and Entitlement Review Team (PERT)

*Goal: Develop a clearer and internally collaborative process to review development projects and get to conditions and recommendation within permit streamlining timeframes. Ensure consistent internal turnaround times by permit type across divisions.*

## #4 – Create a Plan Check & Inspection Team (PCIT)

*Goal: Create efficiencies and coordinate across the Engineering and Building plan check and inspection team. Establish a combined public and private improvement plan project process (applies to new commercial, multi-residential, single lot custom homes).*

## #5 – Optimize Accela (OAT)

*Goal: Establish, communicate, and train staff on a common foundation of policies and procedures for managing the permitting and inspection processes using Accela Automation; resulting in internal and customer efficiencies, streamlined processes, and a reliable database from which to obtain information and make decisions. Continue to refine, expand, and optimize processes going forward to address evolving internal and customer needs.*

## #6 – Administrative Efficiency Measures (AEM)

*Goal: Update/enhance referral communication. Establish electronic referral/distribution of entitlement applications and take steps towards electronic submittal of application materials. Develop template for completeness and preliminary issues letter. Review and update standard conditions of approval. Establish a template for a standard Board and Commission staff report with a consistent review process based on realistic timeframes.*

**Team #4 - Integrated Service Counter (ISC)** Revised January 6, 2016

**Goal:** Establish an integrated single-service counter for intake and tailor services to the different levels and types of customer needs.

- Desired Outcomes:**
- Better address customer needs
  - Decrease wait times
  - Create program that allows customers to schedule appointments
  - Create single counter for all Building, Planning and Engineering requests
  - Develop and implement tiered customer support.
  - Ensure completeness of application submittals and reduce overall turnaround times for application review

**Team Members:** Jesse Oswald, Gary Shirley, Pat Knoles, Laura Ponce, Gabe Osburn

**Action Plan:** Phase I - Develop Program to Better Organize and Handle Customer Requests

| ACTION ITEM   | STEPS  | ASSIGNED TO      | TARGETED COMPLETION DATE | PROGRESS TO DATE                              | RESOURCES NEEDS  | BUDGET TIMEFRAME                             |
|---|--|------------------|--------------------------|---|--|--|
| Organize all customer requests into a tiered structure based on complexity and associated staff time  | Create a Tier I category and assign to all requests that require minimal staff time (no more than 15 minutes) or can be completed by the customer with the appropriate technological resources | All team members | 01/01/2016               | Complete                                      | N/A  | N/A  |
|   | Create a Tier II category and assign to all customer requests that require staff time in the range of 30-45 minutes  | All team members | 01/01/2016               | Complete                                      | N/A  | N/A  |
|   | Create a Tier III category and assign to all customer requests that require significant staff time (more than 1 hour)  | All team members | 01/01/2016               | Complete                                      | N/A  | N/A  |
| Determine technology that can be utilized to better serve customers with Tier I and Tier II requests.   | Investigate the possibility of allowing customers to apply for and receive issued permits through a self service kiosk or the web interface.   | Gabe             | 04/01/2016               | Currently working with IT to research options | Will be determined once research is complete   | Will be determined once research is complete |
|   | Investigate the possibility of allowing customers to fill out applications through a handheld device or kiosk in an attempt to reduce wait times.  | Gabe/Jesse       | 04/01/2016               | Currently working with IT to research options | Will be determined once research is complete   | Will be determined once research is complete |
| Begin the development of a counter layout that allows for separate service lines for the determined tiers. Layout will also allow for all PED services to be provided from a single counter | Review the existing counter configuration and determine a layout that maximizes the number of workstations.  | Gabe/Jesse       | 04/01/2016               | Layout currently under review                 | Additional one-time funds will be needed for space modifications.  | MY FY 15/16                                  |
|   | Determine a customer routing system that creates separate lines for different services. Ensure that customers are waiting behind individuals with similar request.                             | All team members | 04/01/2016               | Plan currently being developed                | N/A  | N/A  |
|   | Staff the check-in desk with a Community Development Technician to ensure better routing of customers and provide additional flexibility in assisting customers during high volume periods     | Gabe/Jesse       | 06/01/2016               | Plan currently being developed                | Additional Community Development Technician. Position will assist in all functions occurring at the counter and allow for the implementation of a system that regularly rotates all technicians through the check-in desk. | MY FY 15/16                                  |
|   | Develop a plan to relocate the application and issuance of Encroachment Permits to the single service counter  | Gabe             | 06/01/2016               | Plan currently being developed                | Additional Community Development Technician. Position will process Encroachment Permit applications and provide additional assistance to other processes occurring at the counter  | FY 16/17                                     |

|  |   |                          |            |  |  |  |
|--|---|--------------------------|------------|--|--|--|
|  | Begin the process of acquiring and implementing a queuing system to properly route customers and determine and report out wait times for different services   | Gabe/Jesse               | 08/01/2016 | Discussions with IT currently underway   | Funds needed to complete the project will be determined through the RFP process  | One-time funds needed for additional hardware and software           |
| Clearly define and begin implementation of a program to issue permits over the counter                                 | Define the permit types that will be eligible for over the counter issuance   | Jesse                    | 08/01/2016 | Process will begin once Building Inspector position to support the counter is hired                                    | Building Inspector position to support the counter. Currently under recruitment.   | N/A  |
|  | Determine the staffing and technological resources that will be needed to support the program. Coordinate with other departments to ensure that Fire and Water have the ability to support the program.   | Jesse/Gabe               | 08/01/2016 | Process will begin once Building Inspector position to support the counter is hired                                    | Building Inspector position to support the counter. Currently under recruitment.   | N/A  |
|  | Determine the days of the week and the times in which the service will be available   | Jesse                    | 08/01/2016 | Process will begin once Building Inspector position to support the counter is hired                                    | Building Inspector position to support the counter. Currently under recruitment.   | N/A  |
|  | Outreach to various stakeholder groups to gain feedback on proposed program   | Jesse/Building Inspector | 08/01/2016 | Process will begin once Building Inspector position to support the counter is hired                                    | Building Inspector position to support the counter. Currently under recruitment.   | N/A  |
| Begin the development of a program that will allow customers to schedule an appointment for various service requests   | Determine the types of projects in Planning, Engineering and Building that are better suited (due to complexity) for a scheduled appointment  | All team members         | 01/01/2016 | Complete   | NA   | NA   |
|  | Initiate a pilot program that allows customers to schedule appointments one day out of the week. Program will attempt to gauge the public's interest in appointment based services and attempt to uncover the specific services that the public would like to have included in the program. | All team members         | 04/01/2016 | Space for additional appointment station determined. Currently in the process of determining hardware needs and costs. | Additional onetime funds needed to cover hardware (printers, monitor, computer) for new appointment station. IT assistance needed to develop global calendar that allows scheduling. | MY FY 15/16.   |
| Create an appointment based program that allows staff and customers to efficiently resolve Code Enforcement violations | Define a window of service and coordinate with Housing to ensure that Code Enforcement staff can commit to being available during the defined window.   | Jesse                    | 10/01/2016 | Plan currently being developed   | N/A  | N/A  |
| Address all Accela issues and ensure that the program is functioning properly on all permit types                      | Determine and resolve issues with the permitting software and begin to utilize the program in the most efficient and beneficial ways possible   | All team members         | 01/01/2017 | Currently working through known issues   | Assistance from TAS position & IK Consulting   | TAS position and additional consultant funds proposed in MY FY 15/16 |
| Conduct outreach to the general public in an attempt to determine a goal for increasing hours of service               | Conduct a survey that attempts to determine the hours of service the best suit the needs of our customers   | Gabe/Jesse               | 12/01/2015 | The survey has gone live and is available to the public  | N/A  | N/A  |
| Provide additional staffing resources to permit routing and file maintenance   | Provide the necessary staffing resources to all permitting related services that occur after application submittal. The additional resources are needed to improve turnaround times associated with application review.   | Jesse                    | 07/01/2016 | Determination has been made regarding staffing needs.  | Additional Senior Administrative Assistant position needed to support processes  | MY FY 15/16  |

**Phase I Summary:**

Phase I of the Action Plan will determine and begin the implementation of a more efficient method of serving our various customers. The first phase will develop a program that allows all PED services to be provided from a single counter, provide a pilot program for service appointments and clearly define complicated processes such as Code Enforcement cases and over the counter permits. In addition, this stage also will identify the resources needed to expand service hours at the counter and improve the turnaround times associated with application review.

**Resource Needs:**

Staffing needs. Phase I is proposing an increase in staff. The proposal involves the addition of one Senior Administrative Assistant and two Community Development Technicians. The stage also requires additional Accela support and the additional of a queuing system.

**Action Plan:** Phase II - Implement Identified Programs, Create Single Service Counter and Expand Service Hours

| ACTION ITEM   | STEPS  | ASSIGNED TO              | TARGETED COMPLETION DATE * | PROGRESS TO DATE  | RESOURCES NEEDS                 | BUDGET TIMEFRAME               |
|---|--|--------------------------|----------------------------|---|---------------------------------|--------------------------------|
| Conduct public outreach to obtain feedback on proposed structure                              | Outreach to the various stakeholder groups in an attempt to understand the impact the proposed changes will have on the community. Include feedback in any revisions that are made to the process moving forward.  | Gabe                     | 60 days                    | No progress to date   | N/A                             | N/A                            |
| Train staff on all proposed process changes   | Conduct training programs to ensure that staff is aware of the proposed changes and is fully involved in the various processes as the move is made towards initialization.   | Gabe/Jesse               | 60 days                    | No progress to date   | N/A                             | N/A                            |
| Initiate queuing system and make final determination on lines of service and customer routing | Determine a go live date for the queuing software and implement  | Jesse/Gabe               | 180 days                   | No progress to date. Queuing system needed prior to proceeding.                     | Queuing system                  | Resource identified in Phase I |
|   | Make a final determination on the lines of service and modify the queuing system accordingly   | Jesse/Gabe               | 60 days                    | No progress to date. Queuing system needed prior to proceeding.                     | Queuing system                  | Resource identified in Phase I |
|   | Staff the check-in counter with a Community Development Technician and develop a schedule that rotates all technicians through the desk  | Jesse                    | 120 days                   | No progress to date. Queuing system needed prior to proceeding.                     | Queuing system                  | Resource identified in Phase I |
|   | Develop a structure that allows technicians to maneuver to different lines as customer volumes increase or decrease  | Jesse                    | 60 days                    | No progress to date. Queuing system needed prior to proceeding.                     | Queuing system                  | Resource identified in Phase I |
| Finalize and modify the service appointment program   | Make a final determination on the services that will be included in the service appointment program and the days of the week in which appointments will be available. The final determination will factor in the results of the pilot program conducted in Phase I | All team members         | 60 days                    | Process will begin once resources identified in Phase I available are               | Resources identified in Phase I | N/A                            |
|   | Develop handouts to describe the program   | All team members         | 120 days                   | Process will begin once resources identified in Phase I are available               | Resources identified in Phase I | N/A                            |
|   | Determine single point of contact for customers requesting appointments  | Jesse/Gabe               | 120 days                   | Process will begin once resources identified in Phase I are available               | Resources identified in Phase I | N/A                            |
|   | Determine if customers will have the ability to request appointments for certain services online.  | Jesse/Gabe               | 120 days                   | Process will begin once resources identified in Phase I are available               | Resources identified in Phase I | N/A                            |
| Clearly define and initiate a program associated with over the counter permit issuance.       | Determine a go live date for the program and initiate  | Jesse/Building Inspector | 120 days                   | Process will begin once Building Inspector position to support the counter is hired | Resources identified in Phase I | N/A                            |
|   | Define the days of the week in which the program will be available.  | Jesse/Building Inspector | 60 days                    | Process will begin once Building Inspector position to support the counter is hired | Resources identified in Phase I | N/A                            |
|   | Produced and circulate literature that clearly defines the eligibility for over the counter permits  | Jesse/Building Inspector | 120 days                   | Process will begin once Building Inspector position to support the counter is hired | Resources identified in Phase I | N/A                            |
| Finalize and initiate program associated with Code Enforcement Cases                          | Determine go live date for the program and initiate  | Jesse                    | 120 days                   | No progress to date   | N/A                             | N/A                            |
|   | Produced and circulate literature that clearly defines the eligibility for over the counter permits  | Jesse                    | 120 days                   | No progress to date   | N/A                             | N/A                            |

|  |   |            |          |                     |     |     |
|--|---|------------|----------|---------------------|-----|-----|
| Modify counter as identified in Phase I to increase available service stations                                 | Work with City staff t to schedule necessary modifications                        | Jesse/Gabe | 120 days | No progress to date | N/A | N/A |
| Relocate all engineering related services currently provided in Room 5 to the single service counter in room 3 | Determine go live date for the relocation of services and implement               | Gabe       | 120 days | No progress to date | N/A | N/A |
|  | Conduct outreach and provide notice to the public regarding the proposed changes. | Gabe       | 90 days  | No progress to date | N/A | N/A |

**Phase II Summary:**

Phase II of the action plan will implement the programs and service modifications identified in Phase I. This stage will also allow the department to return to traditional service hours. Additional service hours can be provide 6 months after the date in which all resource identified in Phase I are in place. A plan will be developed that allows hours to gradually increase throughout the 8 month period. Increases in service hours will be determined based on the experience level of new staff and the anticipated training needed to allow all new staff to function independently.

**Resources Needed:**

The majority of the resources needed to complete the overall program are identified in Phase I. The resource needs in Phase II are minimal and involve assistance from IT to implement the queuing system and to ensure that the appropriate technology needs are met at the additional work stations.

\* The additional resources identified in Phase I must be available prior to the completion of Phase II. The time estimates shown represent the number of days the process is anticipated to take. The estimated date of completion can be determined once the date in which all necessary resources will be acquired is known.

**Action Plan:**

**Phase III - Ensuring Long Term Success of the Program**

| ACTION ITEM  | STEPS   | ASSIGNED TO      | TARGETED COMPLETION DATE ** | PROGRESS TO DATE     | RESOURCES NEEDS | BUDGET TIMEFRAME |
|--|---|------------------|-----------------------------|----------------------|-----------------|------------------|
| Continue to work with TAS position to utilize the full potential of Accela                           | Train any additional staffing resources identified in phase II. Determine rolls and begin to assign responsibilities. | Jesse            | On going                    | No progress to date. | N/A             | N/A              |
| Develop process to routinely review and update all handouts and applications                         | Assign responsibilities within team to ensure that documents are kept up to date and modified on a regular schedule   | All team members | On going                    | No progress to date. | N/A             | N/A              |
| Develop a structure that allows process to be modified as needed to meet current trends.             | Identify stakeholder groups and determine process for receiving feedback regarding the program.                       | Jesse            | On going                    | No progress to date. | N/A             | N/A              |
|  | Develop reports to track turnaround and wait times in an attempt to gauge efficiency of the program                   | Jesse            | On going                    | No progress to date. | N/A             | N/A              |
| Develop training programs to ensure that CD Techs are aware of changes within the various divisions. | Ensure that counter technicians obtain a general knowledge of all functions within the division.                      | Jesse            | On going                    | No progress to date. | N/A             | N/A              |

**Phase III Summary:**

Phase III will attempt to ensure the long term success of the program. This stage will develop programs that will allow the department to gain feedback from the community and involve the feedback in the decision making process. It will also develop training programs to ensure that the information provided and the decisions made at the front counter are consistent with those that are made during the plan review period.

**Resources Needed:**

N/A

\*\* The time estimates shown represent the number of days the process is anticipated to take. The estimated date of completion can be determined once the completion date of Phase II is known.

## Team #2 - Improve Communication (ICOM)

ACTION PLAN - Revised December 14, 2015

*Goal: Communicate development review process and submittal requirements to customers clearly and comprehensively.*

Regular Week Schedule: Fridays 8-10am for working on tasks; and 10AM-NOON FOR TEAM DISCUSSION

RDO Week Schedule: Mondays 3-5pm for working on tasks

Team - Clare, Raissa, Jill, Patrick, Ceci, Larry

| PIAP ACTION   | GOALS/OUTCOMES  | ASSIGNED                 | ACTION STEPS  | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDED   | BUDGET TIMEFRAME |
|---|---|--------------------------|---|--------------------------|--|--|------------------|
| #7 Modernize website  | Update the Department website and tailor improvements to the primary user group - entrepreneurs and homeowners  | Raissa                   | Confirm \$45K in existing funding and complete a contract with The Engine is Red. Provide them with start up materials (initial one sheets, survey card concept, etc.). Focus of contract will be to upgrade Business website.  | 11/20/2015               | Confirmed that TEIR contract is on standby. 10/23/15 Confirmed that scope of work will include website improvements as well as help with publishing process maps, one-sheets, and customer service survey. | Expand TEIR contract by \$\$xxx to continue publication of PIAP action plan and of public "one-sheet" materials; on-line videos for customer support |                  |
|   |   | Raissa                   | Set up a meeting with TEIR and Patrick – Raissa; Serve as contract liaison – Patrick  | 11/20/2015               |  |  |                  |
|   |   | Patrick                  | Patrick to serve as liaison to TEIR once contract is engaged.   | 11/20/2015               |  |  |                  |
|   |   | The Engine is Red (TEIR) | Define scope of work and schedule and begin implementation of projects.   | 12/04/2015               |  |  |                  |
| #44 New and Noteworthy Projects; #49 Enhance Pending Development Report   |   | Larry                    | #49 Meet with Chris, Dale and Greg, Dennis S., Duran, and Brian to connect pending list and permits with GIS and Accela. Looking at Accela module iBuilding to attach permits to parcels in GIS, using a new layer called "Current Development." Brian of IT looking into cost of BuildingEye subscription and identifying any challenges that will need to be addressed. | 12/04/2015               | Explored several options for public-interfacing permit research tools.   | Seek contract and subscription with BuildingEye  |                  |
|   |   | Clare                    | #44 Draft the content for the New and Noteworthy Projects list. Work with Danielle to publish it on website.  | 11/06/2015               | Content completed. Sent to Danielle for publication.   |  |                  |
| #47 PIAP Update communications; #6 Outreach meetings to applicant stakeholders; #37 Outreach to public/neighborhood stakeholders; #38 Utilize blogs, social media | Quarterly or bi-annual outreach workshops to public and customers on what is happening in the department and how to be successful in the permitting process.  | Raissa                   | Continue to schedule and conduct PIAP outreach meetings and develop relationships with stakeholder groups - Raissa, Gabe, Mark, Clare, David  |                          | Several outreach meetings accomplished: Construction Coalition, Engineering Association, North Chapter ACEC, Chamber of Commerce   |  |                  |
|   |   | Clare                    | Determine how/when to connect with public/neighborhood group stakeholders   |                          |  |  |                  |
|   |   | Raissa                   | Prepare the PIAP update communications and develop timetable for updates. Thinking about a monthly newsletter that would highlight the Development in the Spotlight sheet as well as PIAP progress.   |                          | On-going.  |  |                  |
| #42 One-sheets; #40 Pre-app CEQA; #16 Pre-Application Meetings  | Single sheet handouts on the most common questions from customers; Increase the consistency of staff response to common questions; Increase customer self-help services; Later phase will include consistent one sheet branding | Jill                     | Identify and prioritize the top 20 one-sheets; Focusing on developing the content for use in first drafts, work with Clare to assign authors and develop a roll out schedule; Start to draft and collect the contents for the one-sheets Ceci, Jill, Clare  | 11/06/2015               |  |  |                  |
|   |   | Clare                    | Collect samples and draft for CEQA guidance for private development projects. Prepare a draft for review by Molly, Erin, planning staff and counter.  | 12/04/2015               |  |  |                  |
|   |   | Don                      | ADA onesheet content.   |                          |  |  |                  |
|   |   | Jesus                    | WELO one sheet content.   |                          |  |  |                  |
|   |   | Ceci                     | CE one sheet content. (3-4 items)   | 11/20/2015               |  |  |                  |
|   |   | Larry                    | Identify and prepare Engineering one sheet content (could be multiple items)  | 11/20/2015               |  |  |                  |
|   |   | Margaret                 | One sheet content for encroachment permits  | 10/23/2015               | Completed  |  |                  |

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|---|--|---|---|------------|--|---|---|
|   |  | Bill                                      | Develop and publish the Pre-Application one-sheet; Train staff on the process, print hard copies, and save document to One Sheet drive.   | 11/20/2015 | Pre-Application Meeting one-sheet is complete, but still needs hard copies prepped, saving to common drive, and staff training.  |   |   |
|   |  | Sandi                                     | Prepare the Common E: drive for storage of Draft, Final and Public Handout versions of One Sheet program  | 11/20/2015 |  |   |   |
|   |  | The Engine is Red (TEIR)                  | TEIR will take on draft one-sheets and publish them as PDFs for use on website and as handouts. Target 12/04/15 to provide TEIR with its first batch of one-sheets to produce.  | 12/04/2015 |  |   |   |
| #61 Process Maps  | Produce simple process maps for the public such as: ZA, DRB, PC, Encroachment, Tent Map, Tenant Improvement Plan Check, How to Start a Business.             | Patrick                                   | Draft a template for process maps and identify the first round of maps to create.   | 10/23/2015 | Completed.   |   |   |
|   |  | Ceci                                      | Identify building and code specific maps.   |            |  |   |   |
|   |  | Patrick                                   | Content determined for ZA, PC, DRB/CHB, "Start a Business", Tenant Improvement Building Permit, Code Enforcement Case maps.   | 11/06/2015 |  |   |   |
|   |  | Patrick                                   | Final map layout to be sent to Engine is Red for imaging and publishing. Also need them to prepare link connection between one-sheets and maps and visa-versa.  | 11/20/2015 |  |   |   |
| #1 Solicit Customer Feedback                                    | Develop a customer service survey to invite customer feedback and to provide a platform for which to measure progress towards meeting customer expectations. | Raissa                                    | Review the #1 PIAP teams summary which identifies suggested questions and methodologies. Look into PEG funding for opportunity to launch an iPad based survey monkey supported survey system. Survey could be conducted during service at the counter or on-line. May need up to 7 iPads and use of City's survey monkey account. | 12/08/2015 | First customer survey completed and made part of Update #5; Results will be reported out in Update #6 (Feb 2016)   | Need 7 iPads for use by Counter Customers and applicants to perform survey. Need continued use of Survey Monkey account for future surveys. Need admin support to manage the survey, collect and report survey results. | 7 iPads - PEG fund??? = Immediate ; Need SAA for ED = Mid FY15-16 |
| #45 Extend phone hours; #52 Revist phone tree                   |  | Laurie                                    | Planning and EDS phones were modified to reflect open counter hours. Phones are now staffed from 8:30-2:30, Monday through Thursday; Building Phones are now staffed 7:30-noon and 1:00- 5:00 (adding an extra hour in the morning and a second staff person to Building phones all day).   | 10/23/2015 | Completed.   | Completed.  | Completed.  |
|   |  | Lynne                                     | Phone tree was modified to provide four simpler options upfront for customers and once in the right section, an expanded list of options.   | 10/23/2015 |  |   |   |
| #19 Refer businesses to ED; #20 Train ED on permit process      |  | Danielle, Raissa, Clare, Mark, Gabe, Bill | ED has merged into PED; ED staff are invited to Pre-application meetings  |            | Completed. ED has merged into CD and Department is renamed Planning and Economic Development. Referral and training is on-going through ED participation in pre-application meetings with applicants. Coordination is achieved through joint marketing and outreach efforts. | Completed.  | Completed.  |
| #21 Define Board and Commission roles                           |  |   |   |            |  |   |   |
| #36 Develop stakeholder advisory team                           |  |   |   |            |  |   |   |
| #41 Develop YouTube tutorial videos                             |  |   |   |            |  |   |   |
| #48 Change response time from 3 business days to 1 business day |  |   |   |            |  |   |   |

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## Team #3 - Pre-Application & Entitlement Review Team (PERT)

ACTION PLAN - Revised October 9, 2015

*Goal: Develop a clearer and internally collaborative process to review development projects and get to conditions and recommendation within permit streamlining timeframes. Ensure consistent internal turnaround times by permit type across divisions.*

Regular Week Schedule: \_\_\_\_\_

RDO Week Schedule: \_\_\_\_\_

Team - Bill, Danielle, Carol, Amy, Molly, Caryn, Rob, Ian, Massoud

| PIAP ACTION | GOALS/OUTCOMES   | ACTION STEPS & ASSIGNMENTS  | TARGETED COMPLETION DATE | ACCOMPLISHMENTS   |
|-------------|--|---|--------------------------|---|
| 9           | Review and modify existing procedures to ensure the City is consistently in conformance with the Permit Streamlining Act, which requires that applications be deemed complete or incomplete within 30 days of submittal. | Molly and Bill to review literature related to Permit Streamlining Act. Have a team discussion to ensure all members understand the legal requirements, and the City's current process. | Complete                 | The team reviewed Permit Streamlining Act with Molly and Bill. Each division with a present team member (Engineering, Planning, Fire, Traffic, Water), has been working to finish an internal completeness checklist to increase efficiency in deeming an application complete or incomplete. |
| 10          | Designate a project planner to serve as the project manager for each application during the entitlement process, with responsibility to assist the applicant and be the main point of contact for the applicant.         | The project planner will serve as the project manager for each project to facilitate communication between the applicant and other City staff.  | Complete                 | N/A   |
| 11          | Immediately establish a process to monitor performance in achieving turnaround objectives for simple applications.   | Determine which "applications are simple." Generate reasonable timeframes for turnaround. Research what Accela's reporting capabilities might be related to monitoring performance.     | Week of 1/25/16          | None as of January 2016.  |

|    |   |   |        |                          |
|----|---|---|--------|--------------------------|
| 12 | Review the existing turnaround objective for less complex applications and modify as necessary to reflect a reasonable and achievable objective.                  | Determine which "applications are less complex." Generate reasonable timeframes for turnaround.   | Mar-16 | None as of January 2016. |
| 13 | Establish a process to track and monitor turnaround times for the City's response (all departments and divisions) to any new submittal for a complex application. | Determine acceptable turnaround times through collaboration with divisions during PIAP Meeting. Research what Accela's reporting capabilities might be related to monitoring performance. | Mar-16 | None as of January 2016. |

**Team #4 - Create a Plan Check & Inspection Team (PCIT)** Revised January 7, 2016

**Goal:** Create efficiencies and coordinate across the Engineering and Building plan check and inspection teams. Establish a combined public and private improvement plan review and inspection process that will apply to new commercial, multi-residential and single lot homes.

- Desired Outcomes:**
- Allow for one submittal process and single point of contact for all improvements proposed outside of the building envelope
  - Create clear direction for project submittals and process timing for both the customer and staff
  - Ensure better use of staff expertise in plan check and inspection process
  - Improve project tracking for customers and staff
  - Reduce staff overlap and potential conflicts in the entitlement, plan check and inspection processes
  - Improve turnaround time for plan check and entitlement processes
  - Assign Engineering Development Services entitlement and plan check responsibilities for improvements outside of the building envelope

**Team Members:** Mark Setterland, Lynne Charlton, Andrew Cook, Dave Turpel, Don Folsom, Gabe Osburn

**Action Plan:** Phase I - Feasibility Study

| ACTION ITEM   | STEPS   | ASSIGNED TO | TARGETED COMPLETION DATE                                      | PROGRESS TO DATE   | RESOURCES NEEDS  | BUDGET TIMEFRAME   |
|---|---|-------------|---|--|--|--|
| Identify the project types that would be eligible for joint onsite/offsite review               | Conduct a study of previous projects that involved both and onsite and offsite review. Group projects associated based on complexity and type. Determine staff time involved in review. | Mark        | 01/01/2016  | Complete   | Additional Acela support to accurately mine data   | N/A  |
|   | Determine framework for the program that identifies specific project types that will included.  | Mark/Dave   | 01/01/2016  | Complete   | N/A  | N/A  |
| Determine benefits to the customer  | Conduct study of current review times and project efficiencies that will be created by the program.   | Mark        | Begin 1/1/2016 - Complete 4/1/2016                            | Ready to begin study   | SAA 2-4 hours per week   | NA   |
|   | Conduct outreach to determine the customer to gain feedback on the concept  | Gabe        | Begin outreach by 12/01/2015. No anticipated completion date. | The proposed idea has been presented to the private engineering community. Overwhelming positive feedback on the concept was received. Outreaching to the customer base will be an ongoing process and does not have an anticipated completion date. | Capacity needed within EDS conduct routine outreach session to various stakeholder groups. DRC, 2 hours per week | NA   |
| Determine impact to EDS and identify appropriate resources needed to absorb additional workload | Identify the projected volume of additional inspection, plan check and entitlement actions and determine staff time needed for each task.   | Mark/Dave   | 03/01/2016  | No progress to date  | NA   | NA   |
|   | Review EDS structure and develop reorganization plan to efficiently handle additional responsibilities.   | Dave/Gabe   | 06/01/2016  | Initial review of organization underway.   | NA   | N/A  |
|   | Begin utilization of private consultants to assist with the creation and implementation of program. Acquire necessary funds to move forward with the process.                           | Mark        | 01/01/2015  | Schedule initial meeting by 1/2016   | Additional funds needed to increase consultant budget.   | FY 16/17. Anticipated increase to complete Phase I = \$100,000 |

**Phase I Summary:** Phase I of the Action Plan will determine the general structure for the program and identify the anticipate workload. It will also begin an analysis of the EDS division and determine a structure that will allow the section to absorb the additional responsibilities as with the program in the most efficient manor possible.

**Resource Needs:** **Increase to the consultant budget.** Phase I is proposing to utilize the services of outside consultants to assist in the development and initialization of the program. A budget increase in the amount of \$???? is needed to move forward with Phase II of the program. Phase I is not proposing any staffing resources.

**Action Plan:** Phase II - Develop Entitlement, Plan Check and Inspection Procedures and Permit Structure

| ACTION ITEM  | STEPS   | ASSIGNED TO      | TARGETED COMPLETION DATE * | PROGRESS TO DATE   | RESOURCES NEEDS   | BUDGET TIMEFRAME                   |
|--|---|------------------|----------------------------|--|---|------------------------------------|
| Develop a plan check manual covering the review of all onsite improvements                           | Utilize private consultant to assist in determining the level of review that must occur on onsite private improvements. Develop a manual that may be utilized by staff during the plan review process   | Mark, Gabe, Dave | 180 Days                   | No progress to date. Consultant assistance needed to proceed | Increase to consultant budget.  | FY 16/17, as identified in Phase I |
| Determine inspection procedures and develop inspection manual.                                       | Develop procedures processes and steps associated with all onsite inspection types. Determine if inspections should be performed by design engineering or licensed professional hired by the applicant, consultant hired by the City or City staff. | Dave/Don         | 180 Days                   | No progress to date. Consultant assistance needed to proceed | Increase to consultant budget.  | FY 16/17, as identified in Phase I |
|  | Develop a manual that can be utilized by inspectors in the field to ensure that inspection procedures are being followed correctly  | Dave/Don         | 270 Days                   | No progress to date. Consultant assistance needed to proceed | Increase to consultant budget.  | FY 16/17, as identified in Phase I |
| Develop checklist and handouts   | Develop checklists that can be utilized by both the public and internal staff to ensure that the submitted plans are consistent with the requirements.  | Dave/Don         | 270 Days                   | No progress to date. Consultant assistance needed to proceed | Increase to consultant budget.  | FY 16/17, as identified in Phase I |
|  | Develop handouts to instruct the public on submittal requirements, as well as plan review and inspection processes.   | Dave             | 270 Days                   | No progress to date. Consultant assistance needed to proceed | Increase to consultant budget.  | FY 16/17, as identified in Phase I |
| Develop permit structure   | Develop hybrid grading permit in Accela that allows EDS to include onsite improvements.   | Gabe/Debbie      | 180 Days                   | No progress to date.   | Assistance from IT and IK Consultants                                       | N/A                                |
|  | Determine fee structure for permit  | Mark/Gabe        | 180 Days                   | No progress to date.   | Assistance from IT and IK Consultants                                       | N/A                                |
| Determine staffing needs in EDS to manage onsite permitting program and perform plan check functions | Determine the amount of staff time needed to support the program and ensure that plan checks and inspections are performed in an efficient and correct manner. Identify the balance of utilize consultants and City staff.                          | Mark/Dave/Gabe   | 180 Days                   | No progress to date.   | Study may result in the identification of additional staffing needs in EDS. | FY 16/17                           |
| Conduct public outreach to obtain feedback on proposed structure                                     | Outreach to the various stakeholder groups in an attempt to understand the impact the proposed changes will have on current development projects. Include feedback in any revision that are made to the handouts, policies or procedures.           | Gabe/Dave        | 90 Days                    | No progress to date  | DRC 2 hours per week  | N/A                                |

**Phase II Summary:** Phase II of the Action Plan will determine the structure of the program and lay the foundational pieces needed to move forward with implementation.

**Resources Needed:** Prior to moving forward with Phase III, it's likely that an increase to the consultant budget will be needed. It's also likely that an additional staffing resources will be needed within the EDS division to manage the program and handle the additional plan check responsibilities. Assistance will also be need from IT and IK Consultants to make the necessary modifications in the permitting software. A final determination on the resources needed will be made upon completion of Phase

\* The additional resources identified in Phase I must be available prior to the completion of Phase II. The time estimates shown represent the number of days the process is anticipated to take. The estimated date of completion can be determined once the date in which the necessary resources will be acquired is known.

**Action Plan:** Phase III - Implementation

| ACTION ITEM  | STEPS   | ASSIGNED TO       | TARGETED COMPLETION DATE ** | PROGRESS TO DATE     | RESOURCES NEEDS | BUDGET TIMEFRAME |
|--|---|-------------------|-----------------------------|----------------------|-----------------|------------------|
| Obtain and train staffing resources identified in Phase II | Train any additional staffing resources identified in phase II. Determine rolls and begin to assign responsibilities.   | David             | 120 Days                    | No progress to date. | N/A             | N/A              |
| Determine start date and initiate program                  | Determine a date to initiate program. Date should coincide with a time period in which permit volumes are typically low.  | Mark, Gabe, David | 90 days                     | No progress to date. | N/A             | N/A              |
|  | Complete training of staff throughout the division on the proposed changes to the onsite review and inspection. Attempt to ensure that correct direction is provide to customers regarding new procedure. | Gabe/David        | 90 days                     | No progress to date. | N/A             | N/A              |
| Conduct outreach to various stakeholder groups             | Communicate the proposed changes and schedule to the public. Provide significant notice to ensure that future projects are able to properly account for the new procedure.                                | Gabe/David        | 90 days                     | No progress to date. | N/A             | N/A              |
| Determine a program for gauging success of the program     | Identify stakeholder groups and determine process for receiving feedback regarding the program.   | Gabe/David        | 120 days                    | No progress to date. | N/A             | N/A              |
|  | Develop reports to track turnaround times and gauge efficiency of the program   | David             | 90 days                     | No progress to date. | N/A             | N/A              |

**Phase III Summary:** Phase III will move through the necessary steps to implement the program. It will also create additional components that will allow staff to gauge the success of the program by acquiring input for the public and tracking staff time.

**Resources Needed:** N/A

\*\* The additional resources identified in Phase II must be available prior to the implementation of Phase III. The time estimates shown represent the number of days the process is anticipated to take. The estimated date of completion can be determined once the date in which the necessary resources will be acquired is known.

## Team #5 - Optimize Accela Team (OAT) Revised January 6, 2016

**Goal:**

Establish, communicate, and train staff on a common foundation of policies and procedures for managing the permitting and inspection processes using Accela Automation; resulting in internal and customer efficiencies, streamlined processes, and a reliable database from which to obtain information and make decisions. Continue to refine, expand, and optimize processes going forward to address evolving internal and customer needs.

**Desired Outcomes:**

- Establish a "go-to" team of Accela-knowledgable staff, responsible for ensuring Accela-related questions and needs of users are addressed; and consistent usage processes are enforced
- Establish, document and communicate policies and procedures on how to use Accela, specific to each functional area / business process
- Establish a standard lexicon that includes common terms, abbreviations, and file naming conventions to use within Accela, to ensure consistency and common understanding
- Identify training needs for all functional areas; establish initial and on-going training plan; provide training, including reference materials
- Ensure consistent usage of Accela across the City; leading to a reliable database of information for monitoring, reporting, and decision making
- Provide consistent processes and tools available to all interested parties, regarding processing times for entitlement and building permit applications; as well as easily accessible, real-time information to management to better monitor response times and progress towards deadlines
- Establish tools and processes to monitor and ensure consistent usage of Accela
- Identify areas for improvement in Accela Automation and areas where Accela can be leveraged to provide further optimization of City processes; Establish plan to implement identified optimizations

**Team Members:**

Mark Settlerland, Eric Gage, Michael Enright, Joshua Damron, Mike Reynolds, John Silva, Debbie Kalemba, Brian Tickner

**Action Plan:** Phase I - Establish Accela Polices and Procedures (Related to PIAP Tasks 55, 56, 58)

| ACTION ITEM                                    | STEPS  | ASSIGNED TO               | TARGETED COMPLETION DATE | PROGRESS TO DATE  | RESOURCES NEEDS | BUDGET TIMEFRAME |
|--|--|---------------------------|--------------------------|---|-----------------|------------------|
| Establish team of Accela coordinators (#55)    | Coordinator for Planning   | Eric Gage                 | 10/14/2015               | Establish Coordinators - Completed.<br>On-going coordination efforts  |                 |                  |
|  | Coordinator for Building   | Michael Enright           | 10/14/2015               | Establish Coordinators - Completed.<br>On-going coordination efforts  |                 |                  |
|  | Coordinator for Engineering  | Joshua Damron             | 12/18/2015               | Establish Coordinators - Completed.<br>On-going coordination efforts  |                 |                  |
|  | Coordinator for Code Enforcement   | Mike Reynolds             | 12/04/2015               | Establish Coordinators - Completed.<br>On-going coordination efforts  |                 |                  |
|  | Coordinator for Accela Technology  | Debbie Kalemba            | 10/14/2015               | Establish Coordinators - Completed.<br>On-going coordination efforts  |                 |                  |
| Establish Accela policies and procedures (#56) | Assess, define, and document processes for using Accela Automation, specific to Planning         | Eric Gage                 | 01/20/2016               | Developed process flow matrix; including detailed workflow tasks  |                 |                  |
|  | Assess, define, and document processes for using Accela Automation, specific to Building         | Michael Enright           | 02/29/2016               | Developed process flow matrix   |                 |                  |
|  | Assess, define, and document processes for using Accela Automation, specific to Engineering      | Joshua Damron             | 02/29/2016               |   |                 |                  |
|  | Assess, define, and document processes for using Accela Automation, specific to Code Enforcement | Mike Reynolds, John Silva | 01/28/2016               | Began development of initial process documentation  |                 |                  |
|  | Define policy for appropriate sized monitor based on role / job function                         | OAT Team                  | 01/12/2016               |   |                 |                  |
| Establish a standard lexicon (#58)             | File Naming Conventions  | OAT Team                  | 01/15/2016               | <p>Established file naming conventions:</p> <p>"Document Name" field in file upload:</p> <p>Naming Convention Format:<br/>YYYY-MM-DD DocumentType</p> <p>Naming Convention Examples:</p> <ul style="list-style-type: none"> <li>o 2015-10-09 1st Submittal Letter</li> <li>o 2015-10-12 Issues Letter</li> <li>o 2015-12-08 Approvals Letter</li> <li>o 2016-01-05 Resolution</li> </ul> <p>If more than one, then added "2nd", etc. (e.g. "2nd Issues Letter")</p> <p>** need to make part of standard documentation</p> |                 |                  |
|  | Abbreviations  | OAT Team                  | 01/15/2016               | Jesus McKeag provided starting point; need to refine and make part of standard documentation  |                 |                  |
|  | Common Terms   | OAT Team                  | 01/15/2016               |   |                 |                  |

**Phase I Summary:** Phase I of the Action Plan will identify the team members to represent the functional areas throughout the course of the Action Plan and establish the foundation regarding policies and procedures for using Accela Automation in a common, consistent manner.

**Resource Needs:** **No additional resources required.** Phase I will utilize the services of existing staff to confirm and document the policies and procedures, based on the current Accela Automation configuration already in place.

**Action Plan:** Phase II - Develop and Provide Training for Accela Automation (Related to PIAP Task 59)

| ACTION ITEM  | STEPS   | ASSIGNED TO  | TARGETED COMPLETION DATE | PROGRESS TO DATE                                      | RESOURCES NEEDS | BUDGET TIMEFRAME |
|--|---|--|--------------------------|---|-----------------|------------------|
| Provide Accela training (#59)  | Establish training materials and plan for Planning training         | Eric Gage - Planning   | 01/20/2016               | Developed process flow matrix for training            |                 |                  |
|  | Conduct initial training with Planning staff                        |  | 01/20/2016               | Reserved CHA-Comalli to conduct training on 1/20/2016 |                 |                  |
|  | Develop plan for on-going training                                  |  |                          |   |                 |                  |
|  | Establish training materials and plan for Building training         | Michael Enright - Building   | 2/29/2015                | Drafted initial process flow matrix for training      |                 |                  |
|  | Conduct initial training with Building staff                        |  |                          |   |                 |                  |
|  | Develop plan for on-going training                                  |  |                          |   |                 |                  |
|  | Establish training materials and plan for Engineering training      | Joshua Damron - Engineering  | 01/31/2016               |   |                 |                  |
|  | Conduct initial training with Engineering staff                     |  |                          |   |                 |                  |
|  | Develop plan for on-going training                                  |  |                          |   |                 |                  |
|  | Establish training materials and plan for Code Enforcement training | Mike Reynolds / John Silva - Code Enforcement  | 01/28/2016               |   |                 |                  |
|  | Conduct initial training with Code Enforcement staff                |  | 01/28/2016               | Reserved CHA-Comalli to conduct training on 1/28/2016 |                 |                  |
|  | Develop plan for on-going training                                  |  |                          |   |                 |                  |
|  | Other Departments   | OAT Team, plus:<br><ul style="list-style-type: none"> <li>o Front Counter - CD Tech, Margaret, Eric</li> <li>o Fire - Ian, Scott</li> <li>o Water / Environmental Review - Celia, Karen, Gabe</li> <li>o Rec &amp; Parks - Tara Thompson</li> <li>o Stormwater - Heaven Moore</li> <li>o WELO - EDS</li> </ul> |                          |   |                 |                  |
|  | Cross-departmental Training   | OAT Team   |                          |   |                 |                  |
|  | External Users (Citizens, Contractors, etc.)                        | OAT Team   |                          |   |                 |                  |
| Define training plan for Accela coordinators to ensure they are "one step ahead" and have the knowledge and tools needed | Mark Setterland / Brian Tickner                                     |  |                          |   |                 |                  |

**Phase II Summary:**

Phase II of the Action Plan will leverage the policies and procedures established in Phase I to serve as the basis for the training materials developed as part of this Phase II. The Accela coordinators established in Phase I will also schedule and conduct the training sessions.

**Resource Needs:**

**No additional resources required at this time.** Phase II will utilize existing City resources and the services of current staff to develop training materials and conduct the training sessions. There could be a need for additional training funding for the Accela coordinators so they could attend conferences and/or Accela-provided training, if needed.



**Action Plan:** Phase III - Review and Enforce Accela Usage, and Report on Key Data Points (Related to PIAP Tasks 15, 32, 33, 60)

| ACTION ITEM  | STEPS   | ASSIGNED TO                               | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDS | BUDGET TIMEFRAME |
|--|---|---|--------------------------|--|-----------------|------------------|
| Require that all departments involved in the permitting and development inspection process use Accela to record their activities and comments about a project (#32)  |   |   |                          | * To begin after Phase II (Accela training) is completed |                 |                  |
| Track, analyze and report results of the time required to process entitlement and building permit applications (#33);<br>AND<br>Establish a process to monitor and report response time and information about timelines to management on a regular basis (#15) |   |   |                          | * To begin after #32 Require Accela usage is completed   |                 |                  |
| Accela use monitoring (#60)  | Assess tools for monitoring, including dashboards, notifications, report analysis, data/record review, etc. | Brian Tickner, Debbie Kalemba, Brian Baca | 01/31/2016               | Began investigation                                      |                 |                  |
|  | Develop monitoring tools  |   |                          | * To begin after PIAP #33/#15 are completed              |                 |                  |
|  | Provide training on monitoring tools  |   |                          | * To begin after PIAP #33/#15 are completed              |                 |                  |

**Phase III Summary:** Phase III of the Action Plan implements processes to ensure that Accela Automation is being used across all applicable departments, and that policies established in Phase I and conveyed via Training and Documentation from Phase II are being followed. Phase III also establishes reporting metrics for key data points.

**Resource Needs:** No additional resources required at this time. Phase III will utilize existing City resources and the services of current in-house and contract staff to develop the monitoring, reporting, and enforcement tools.

**Action Plan:** Phase IV - Optimize the Use of Accela Automation and Related Processes (Related to PIAP Task 57)

| ACTION ITEM             | STEPS   | ASSIGNED TO   | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDS  | BUDGET TIMEFRAME  |
|-------------------------|---|---|--------------------------|--|--|---|
| Optimize progress (#57) | Develop, enhance, and fix reports   | Mark Setterland, Brian Tickner for recruitment and management of report priorities; Brian Baca on-board as of 12/14/2015 to do report development | 06/30/2016               | Recruited Agency Temp from Nelson Technologies (Brian Baca) - started 12/14/2015 | 1 Contract employee / Agency temp to address misc conversion issues and develop reports; up until TAS position can be added and filled                                   | Immediate. \$84K for 7 months (\$75/hr x 40/hrs a week x 28 weeks)  |
|                         | Work to add position as part of the mid-year budget process   | Mark Setterland, Brian Tickner  | 02/29/2016               |  | 1 FTE Technical Application Specialist (TAS) to configure / implement and support current system configuration as well as identified additions and changes going forward | Mid FY15-16 = \$110K annually (\$77,925 Step 3 salary, plus \$32,000 benefits)  |
|                         | Debbie to check with Missy about creating a script to automatically assign the first workflow task to that same Planner when the record is assigned to them   | Debbie Kalemba  |                          |  | Existing staff to work with existing consultant  | N/A   |
|                         | Optimize and expand on interaction between Accela and City GIS systems  | OAT Team / IT GIS (Mike Hargreaves, Chris Green, Dennis Shakespeare)  |                          |  | Scope still being determined, but will most likely not require additional resources; instead, would use services of existing City staff                                  | N/A   |
|                         | Implement Electronic Plan Check, integrated with Accela Automation  | TBD   |                          |  | ePlanSoft software (including Adobe Acrobat Professional licenses)   | Mid FY16-17 = \$120,700 (\$101,700 for 50 named user licenses @ \$1,695 = \$84,750; + \$16,950 for first year software support and maintenance; plus 50 users x \$380 for Adobe Professional licenses = \$19,000) |
|                         | Purchase required monitors, when funding available  | Brian Tickner, Mark Setterland  | 03/31/2016               |  | Larger Monitors for staff  | Mid FY15-16 = \$7,000 (\$350/ea x 20 monitors)  |
|                         | For Planning referrals, if Workflow Status is set to "Approved w/Conditions", "Incomplete" or "Revision Required", send notification to the "Assigned To Staff" person for the record, that says: "A file has been uploaded for application XXXX with a status of YYYY" (e.g. "Approved w/Conditions"). | Debbie Kalemba  |                          |  | Existing staff to work with existing consultant  | N/A   |
|                         | Add Document Category of "Support Documentation" for uploading files  | Debbie Kalemba  |                          |  | Existing staff   | N/A   |
|                         | Change column ordering (of Documents) to show:<br>Filename<br>Category<br>Department<br>Uploaded By<br>Uploaded Date<br>Others as are on the system today   | Debbie Kalemba  |                          |  | Existing staff   | N/A   |

|  |                |            |  |   |   |
|--|----------------|------------|--|---|---|
| If we are not storing the resolution documents in Accela, need a way to identify / document the resolution number in the Accela record so it can easily be located in LaserFiche | OAT Team       | Completed  | Decision: We will add it to the Comments in the Decision workflow task   | Existing staff  | N/A   |
| Confirm if there are any unused / unassigned Categories for documents / attachments (so they can be removed)   | Debbie Kalemba |            |  | Existing staff  | N/A   |
| Provide more visibility for the Public into the Building, Planning, and Code Enforcement activities / permits, etc.  | Brian Tickner  | 03/31/2016 | Assessed options. Working on contract with Accela for the BuildingEye product. Contract being reviewed by CAO. | Need to purchase subscription for BuildingEye software product that integrates directly with Accela Automation. | Mid FY15-16 = \$38,221.20 (3 year subscription) |
|  |                |            |  |   |   |

**Phase IV Summary:**

Phase IV of the Action Plan is focused on building off of the previous 3 phases by reassessing how well the implemented processes are working, and then optimizing them further. Additional work will also be done during this phase to extend the functionality of Accela Automation, as well as add additional processes, functionality, and efficiencies.

**Resource Needs:**

**Requires several additional resources; some still to be determined.** See "Resources Needs" and "Budget Timelines" columns for more information.

**Team #6 - Administrative Efficiency Measures (AEM)** Created 12/30/2015

**Goal:** Update/enhance referral communication. Establish electronic referral/distribution of entitlement applications and take steps towards electronic submittal of application materials. Develop template for completeness and preliminary issues letter. Review and update standard conditions of approval. Establish a template for a standard Board and Commission staff report with a consistent review process based on realistic timeframes.

- Desired Outcomes:**
- Useful, comprehensive, easy to use referral comments within a specified timeframe
  - Efficient referral process - distributed more quickly, requires less paper
  - Create 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
  - Standard conditions of approval for consistency and to communicate requirements
  - Universal applications, checklists and templates
    - Universal staff report template for Council, Board, and Commission actions, facilitating preparation of subsequent hearings; improved quality control for reports

**Team Members:** Karen Arents, Sandi Bliss, Jessica Jones, Tracy Selge, Laurie Stoddard

**Action Plan:**  
 Priority I - Updates to internal processes/communication of these processes to the public  
 Priority II - Records management/make records more accessible  
 Priority III - Universal application submittal (paper and electronic)/Simplify application submittal

| PIAP ACTION             | STEPS  | ASSIGNED TO  | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDED    | BUDGET TIMEFRAME | PRIORITY |
|-------------------------|--|--------------|--------------------------|--|---------------------|------------------|----------|
| Electronic Applications | Create interactive forms   | Laurie       | 01/15/2015               | Updated acknowledgment form to include release language and CUP application. | Time                |                  | III      |
|                         | Work with IT on options for electronic submittals. Being considered as part of front counter improvements. | Laurie/Sandi |                          | Not started  | Time/IT programming |                  | III      |
|                         | Research PayPal type payment options   | Laurie/Sandi |                          | Not started  | Time/IT programming |                  | III      |

| PIAP ACTION   | STEPS  | ASSIGNED TO | TARGETED COMPLETION DATE | PROGRESS TO DATE  | RESOURCES NEEDED | BUDGET TIMEFRAME | PRIORITY |
|---|--|-------------|--------------------------|---|------------------|------------------|----------|
| Keep project stakeholders (including property owner) in the loop with pertinent communication | 1) At time of application identify who are the additional parties involved in the project. It will be incumbent upon applicant to provide this information to the City. Determine with applicant the level of communication needed, i.e., copied on all emails, weekly/monthly check in emails, only written communications, no communication. 2) Planner, Engineer, etc. to keep a list of stakeholders and their communication preferences. Lead staff person to enter all contact information into Accela Automation contacts. 3) Update applications to include owner email and phone number. Add fields to Universal application form | Sandi       |                          | No progress to date   | Time             |                  | I        |
| Universal application   | Review other agencies universal applications   | Jessica/Amy | Complete                 |   |                  |                  | III      |
|   | Create detailed submittal instructions   | Jessica/Amy | May-16                   | Draft checklist for hillside application prepared and sent to planners for feedback 12/18/2015 to be reviewed at 12/23 planning meeting | Planner time     |                  | III      |
|   | Create draft of application and route for feedback   | Jessica/Amy | May-16                   | Draft application prepared and sent to planners for feedback 12/18/2015 to be reviewed at 12/23 planning meeting                        | Planner time     |                  | III      |
| Access staff calendars  | Establish protocols for when a meeting is needed   | Tracy       | 31-Jan-16                |   |                  |                  | I        |
|   | Establish list of frequently needed positions  | Tracy       | 31-Jan-16                |   |                  |                  | I        |
|   | Establish protocols for setting up a meeting   | Tracy       | 31-Jan-16                |   |                  |                  | I        |
| Weekly setting priorities   |  | Clare       | Completed                |   |                  |                  |          |

| PIAP ACTION                    | STEPS   | ASSIGNED TO | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDED                               | BUDGET TIMEFRAME | PRIORITY |
|--------------------------------|---|-------------|--------------------------|--|--|------------------|----------|
| Digitization of records        | Microforms converted to digital images                        | Karen       |                          | First shipment of microform images has been sent out for digitization and is anticipated to be returned for QA in approximately 2 weeks from 10/20. Karen and Sandi are scanning PC minutes and resolutions into LF. Lynne and Laura are scanning current building permits into LF. There are 31,241 building permits waiting to have metadata data and be renamed in LF. Patti has all DRB minutes and resolutions loaded into LF. Laurie is in the process of loading CHB documents into LF. | Staff to QC returned images and input metadata |                  | II       |
|                                | Scan hard copy files  | TBD         |                          |  | Staff to QC returned images and input metadata |                  | II       |
| Update referral list and forms | Identify stakeholders to optimize communication               | Karen       |                          | In progress  |  |                  | I        |
|                                | Define purpose of referral letter (transmit plans? Due date?) | Karen       |                          | Referral letters reviewed by planners, and changes made  |  |                  | I        |
|                                | Determine what info is helpful to reviewers                   | Karen       | Completed                | Current letters updated  |  |                  | I        |
|                                | Define what kind of info City is seeking in response          | Karen       |                          |  |  |                  | I        |
|                                | Draft standardized response templates                         | Jessica     |                          | None   |  |                  | I        |

| PIAP ACTION          | STEPS  | ASSIGNED TO | TARGETED COMPLETION DATE | PROGRESS TO DATE  | RESOURCES NEEDED  | BUDGET TIMEFRAME | PRIORITY |
|----------------------|--|-------------|--------------------------|---|---|------------------|----------|
|                      | Establish electronic referral/distribution of entitlement applications                   | Karen       |                          | None  |   |                  | I        |
|                      | Useful, comprehensive, easy to use referral comments within a specific timeframe         | Jessica     |                          | None  |   |                  | I        |
|                      | Finalize letters and response templates  | Jessica     |                          | Letters completed.  | Accela programming time. Templates awaiting Accela reporting capabilities.  |                  | I        |
| Electronic Referrals | Identify which internal departments and outside agencies (e.g., tribes) need hard copies | Karen       |                          | Planners have identified which agencies are sent referrals. Next step: Contact agencies to confirm contact name.  | 12/4/2015 Karen to contact referral depts. to update questions and contact outside agencies to confirm addresses/contacts and updating contact list. Karen to work with Debbie to get Accela workflow scripting complete and create referral reports. |                  | I        |
|                      | Identify agencies and departments that would accept electronic submittals                | Karen       |                          | Planners have identified which agencies are sent referrals. Next step: Contact agencies to confirm contact name.  |   |                  | I        |
|                      | Determine which electronic submittals may be disseminated                                | Karen       |                          | Planners have identified which agencies are sent referrals. Next step: Contact agencies to confirm contact name.  |   |                  | I        |
|                      | Establish process to scan (PDF) submittal materials                                      | Karen       |                          | Early discussion  |   |                  | I        |
|                      | Determine if any software or equipment upgrades are necessary                            | Karen       |                          |   | IT programming  |                  | I        |
|                      | Implement electronic referrals   | Karen       |                          |   | IT programming  |                  | I        |
|                      | Establish process for allowing for electronic submittal of application materials         | Karen       |                          |   | IT programming  |                  | I        |
|                      | Develop an interdepartmental task group  | Jessica     | May-16                   | Collected existing standard conditions. Develop template for completeness and preliminary issues letter is included in PIAP #3 PERT. Need to confirm with Bill - Don't think it's included in PERT. | Time  |                  | I        |

| PIAP ACTION  | STEPS  | ASSIGNED TO                | TARGETED COMPLETION DATE | PROGRESS TO DATE   | RESOURCES NEEDED | BUDGET TIMEFRAME | PRIORITY |
|--|--|----------------------------|--------------------------|--|------------------|------------------|----------|
| Complete/Issue Template                                  | Each department to develop checklists for completeness items, applicable policies, standards and requirements  | Jessica/stakeholders       |                          |  |                  |                  | I        |
|  | Develop a standard format for all departments  | Jessica/stakeholders       |                          |  |                  |                  | I        |
|  | Refine checklists and identify duplication of work and clarify departmental roles  | Jessica/stakeholders       |                          |  |                  |                  | I        |
|  | Circulate draft checklists for review and approval   | Jessica/Sandi              |                          |  |                  |                  | I        |
|  | Review and update standard conditions of approval<br>1) Identify Stakeholders<br>2) Gather list of "standard conditions" from all sources 3) Define the purpose and planned use of the standard conditions<br>4) Revise the conditions (work in teams) | Jessica/stakeholders       |                          |  |                  |                  | I        |
| Universal staff report                                   | Sandi  |                            | Completed                |  |                  |                  |          |
| Checklist for complete entitlement applications          | See PIAP #3 PERT   |                            |                          | See PIAP #3 PERT   |                  |                  | I        |
| Checklist for complete engineering/building applications | Decide how to address "special" conditions   | See Randy and David's team |                          | Dave and Dennis are working on the complete application checklist for public improvement plans (work in the public right-of-way, issued with an encroachment permit) |                  |                  | III      |
| Standard Conditions of Approval                          | Compile all standard conditions of approval for review   | Jessica                    |                          | See PIAP #3 PERT   |                  |                  | I        |
|  | Review standards for necessary changes or additions  | Jessica                    |                          | See PIAP #3 PERT   |                  |                  | I        |
|  | Possibly create new document which can be entered into Accela with drop downs to choose from   | Jessica/Sandi              |                          | See PIAP #3 PERT   |                  |                  | I        |