



City Hall ● 425 N. El Dorado Street ● Stockton, CA 95202-1997 ● [www.stocktonca.gov](http://www.stocktonca.gov)

## **Meeting Summary**

The following is a summary of the topics discussed in the DevStat meeting on 04/22/2021. Analysis is provided by the Office of Performance and Data Analytics. Information in the memo has been edited to protect Personal Identifiable Information (PII) and ensure accuracy. Note that the data and visuals included in this memo reflect a specific period in time, and as a result, information below can be subject to change.

This meeting will cover the following subjects in further detail:

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## **Recent Key Accomplishments**

- **Goal: Improving Building Plan Check**
  - Final workflow modifications for Building Plan Check process completed and made live in Accela, all functional teams trained.
  - Project intake “triage” checklists finalized, staff trained, customer information materials finalized.
  - Functional drafts complete of the Building Plan Check Current Project Monitoring reports for team Supervisors, the Project Liaison, and Building Official (for 3<sup>rd</sup> Party plan checks), samples included in Appendices. Formatting and minor modifications in-progress.
  - Plan Check Supervisors status meetings initiated to monitor projects for workloads, due dates, and potential schedule risks.
- “Mini i-Lab” kickoff meeting held for the Improvement Plan (Engineering / Public Works) process, draft task list in Appendix.
  - Initial kick off on was held on April 13<sup>th</sup> between Public Works and Community Development on process improvements on the improvement plans.
    - Defined overlap of assignments and responsibility of both departments
    - Next Steps will be to establish formal timelines for the process and defining key performance indicators.
- “Mini i-Lab” kickoff meeting held for the Business License process with ASD, CDD, Fire, EDD, draft task list in Appendix.
  - “Process” is outside of the new system and can be addresses without disrupting system implementation.
  - Follow-up item: average time to get a business license?

## **Permit Center Counter Operations Improvements: Overview & Progress Update**

CDD has initiated an effort to improve the customer experience at the Permit Center counter by reducing the number of “hand-offs” a customer experiences in needing to work with multiple staff members to accomplish their goal. For example, a customer applying for a permit to build a patio cover is likely to transition between different staff members up to three times before securing their permit. CDD anticipates that through team cross-training we will:

- Reduce the number of hand-offs between staff,
- Reduce processing time, and
- Increase customer satisfaction.

The effort has been organized into three phases, by type of projects. Sub teams have been assembled to analyze the process from the customer point-of-view, what tasks are currently

performed by which team members, and to identify opportunities that through cross-training the number of hand-offs can be reduced.

Strategies for Phase 1 have been developed, and implementation planning is currently underway.

Task Name	Duration	Start	Finish
<b>Phase 1 - ADU, Patio, Signs</b>	<b>49 days</b>	<b>Tue 3/9/21</b>	<b>Fri 5/14/21</b>
<b>Phase 2 - Pools, Sheds</b>	<b>55 days</b>	<b>Mon 5/3/21</b>	<b>Fri 7/16/21</b>
<b>Phase 3 - CE Citations &amp; HOPs</b>	<b>57 days</b>	<b>Thu 7/1/21</b>	<b>Fri 9/17/21</b>

### **Two Week Lookahead (by 5/01)**

- Complete edits and finalize Project Pipeline Monitoring reports
- Complete edits and finalize KPI tracking reports; begin report development in Socrata
- Complete functional draft of expanded permit data report for set up in Socrata
- Test draft workflow for new Small Cell permit type in Accela
- Finalize and roll-out workflow improvements for Building/Outside City Limits (utility connections) permits in Accela
- Finalize and roll-out workflow improvements for Planning Project permits in Accela

## Appendix 1 – Task List / Status Update for Goal: Improving Building Plan Check Process

Key current tasks highlighted **yellow**

Task Name	% Complete	Start	Finish	Notes
<b>Goal: Reduce Duration &amp; Cycle Count of Building Permit Plan Check Process</b>	<b>45%</b>	<b>Mon 8/31/20</b>	<b>Wed 9/15/21</b>	
<b>Establish baseline KPIs</b>	<b>100%</b>	<b>Mon 1/11/21</b>	<b>Thu 2/18/21</b>	<b>Completed at 2/18/21 DevStat meeting</b>
<b>Improve ongoing KPI tracking &amp; reporting capability</b>	<b>78%</b>	<b>Mon 12/7/20</b>	<b>Thu 6/3/21</b>	
Build reports: Duration & cycle count by record, duration & cycle count by task/division/department	100%	Mon 12/28/20	Fri 1/22/21	1/22 - Confirmed Accela has uploaded Crystal report   Need KPI data report to feed into Socrata - Review cycle counts, by task, by permit; § Review duration for each cycle; § Review duration for Plan Submittal to Approval; § Duration plans out w/ applic
All BP tasks "Public works" renamed to "Engineering"	100%	Tue 2/9/21	Tue 2/9/21	
<b>ID &amp; execute Accela configuration changes to facilitate better data quality and tracking</b>	<b>96%</b>	<b>Mon 12/7/20</b>	<b>Fri 4/23/21</b>	
<b>BP auto routing to Sr. Planner for plan review</b>	<b>100%</b>	<b>Mon 12/7/20</b>	<b>Thu 1/21/21</b>	<b>02/01/21 - Confirmed working per Planning Manager</b>
Accela modifications to support KPI tracking	100%	Mon 2/1/21	Wed 3/24/21	3/12 - Round two modifications in SUPP, pending RL & JS test...
<b>Develop tools for staff and leadership for project pipeline management &amp; tracking - dashboards, reports, etc.</b>	<b>90%</b>	<b>Tue 3/2/21</b>	<b>Fri 4/23/21</b>	<b>4/07 - V2 confirmed updated in Accela, need final testing &amp; team feedback...</b>
Establish agreed upon oversight method for tracking due dates and ensuring deadlines are met	100%	Thu 2/25/21	Thu 3/25/21	
Accela changes into Production environment	100%	Thu 3/25/21	Tue 3/30/21	Move to prod 3/26; test & tweak Monday-Wed

Task Name	% Complete	Start	Finish	Notes
Plan Checker work session: Workflow modifications, tools to manage workload/projects, expectations starting 4/01	100%	Tue 3/30/21	Tue 3/30/21	Scheduled - Topics: Accela tasks and tools to manage workload, Procedures for Accela workflow, Discussion on advertised cycle times and benchmarks, Discussion on tracking and reporting going forward, Discussion on plan check policies/procedures, Bluebeam
Finalize Accela reports & establish Socrata visualizations & Story Page for ongoing KPI tracking & reporting	5%	Thu 2/18/21	Thu 6/3/21	4/06 - KPI report mark-ups discussed; currently priority 3 for STK
<b>Improve submittal quality</b>	<b>54%</b>	<b>Mon 1/4/21</b>	<b>Fri 6/18/21</b>	
Evaluate decision tree customer service tool	100%	Mon 1/4/21	Fri 2/19/21	2/22/21 - Initial research completed, continuing to pursue project. Creating separate project to capture STOC approval, procurement, selection, implementation activities....
<b>CDD/MUD/Fire Work sessions</b>	<b>100%</b>	<b>Thu 2/25/21</b>	<b>Tue 3/23/21</b>	
<b>Intake Triage</b>	<b>100%</b>	<b>Fri 2/19/21</b>	<b>Tue 3/30/21</b>	<b>Need tools for counter staff to make determination at counter based on project type</b>
<b>Improve design professional understanding of submittal requirements - Plans, Checklists, Workshops</b>	<b>17%</b>	<b>Wed 1/27/21</b>	<b>Fri 6/18/21</b>	
MUD Workshops for SWQCCP	100%	Wed 1/27/21	Wed 2/3/21	1/27/21 - ~60 participants in first session
Kickoff IWG (Industry Working Group)	15%	Mon 3/1/21	Fri 6/18/21	4/05 - First establish PFF working group, then select IWG members from the PFF group
Develop Handouts - What makes a good plan submittal? Requirements into customer format.	0%	Mon 3/22/21	Fri 4/16/21	
Virtual workshop series	0%			
<b>Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations</b>	<b>0%</b>	<b>Fri 6/4/21</b>	<b>Thu 7/1/21</b>	
CDD	0%	Fri 6/4/21	Thu 7/1/21	Includes Building, Planning, Engineering
MUD	0%	Fri 6/4/21	Thu 7/1/21	
Fire	0%	Fri 6/4/21	Thu 7/1/21	

Task Name	% Complete	Start	Finish	Notes
<b>Transition to and promote a "customer first" approach in plan review</b>	<b>26%</b>	<b>Fri 1/1/21</b>	<b>Wed 9/15/21</b>	<b>"Substantial compliance with the code"</b>
Transition to 100% Electronic Plan Check	100%	Fri 1/1/21	Mon 3/1/21	
Develop training strategy & plan for all reviewing disciplines	0%	Thu 4/1/21	Wed 9/15/21	Letter of the law vs. reasonableness / intent, best practices in plan review
<b>Goal Tracking &amp; Report</b>	<b>8%</b>	<b>Thu 4/1/21</b>	<b>Thu 7/22/21</b>	
Tracking period	8%	Thu 4/1/21	Wed 6/30/21	For First Submittals starting within this period
Report on performance for tracking period	0%	Thu 7/22/21	Thu 7/22/21	

**Appendix 2 – Draft Task List for Business License Process Improvement Effort**

ID	Task Name	% Complet	Start	Finish
121	<b>GOAL: Improve Efficiency in Business License Process</b>	<b>3%</b>	<b>Wed 4/14/21</b>	<b>Mon 6/28/21</b>
122	Initial discussion to begin mini-iLab	100%	Wed 4/14/21	Wed 4/14/21
123	ERP Phase 2 Go-Live	0%	Mon 5/3/21	Mon 5/3/21
124	Sub-team to kickoff "mini i-Lab"	0%	Tue 5/18/21	Mon 5/24/21
125	Document Business License process across departments	0%	Tue 5/18/21	Mon 5/31/21
126	Identify process improvement options, recognizing Munis constraints	0%	Tue 6/1/21	Mon 6/14/21
127	Present improvement options and recommendation to leadership for further action	0%	Tue 6/15/21	Mon 6/28/21

### **Appendix 3 – Draft Task List for Improvement Plans Process Improvement Effort**

ID	Task Name	% Complet	Start	Finish
107	<b>Goal: Reduce Duration &amp; Cycle Count of Improvement Plan Check Process</b>	<b>9%</b>	<b>Tue 2/9/21</b>	<b>Fri 7/30/21</b>
108	Rerun pilot Electronic Pland Check project	100%	Tue 2/9/21	Fri 2/26/21
109	Kickoff Meeting	100%	Tue 4/13/21	Tue 4/13/21
110	Establish baseline KPIs - Durations and cycle counts	25%	Mon 4/5/21	Mon 4/26/21
111	Draft a clear process flow	0%	Tue 4/13/21	Mon 4/26/21
112	<b>Roles, Responsibilities, &amp; Expectations</b>	<b>0%</b>	<b>Tue 4/13/21</b>	<b>Fri 7/16/21</b>
113	PW plan review checklist discussion	0%	Tue 4/13/21	Mon 5/10/21
114	Define expectations for plan review & project requirements	0%	Mon 4/26/21	Fri 5/21/21
115	Develop plan review training based on roles/repsonsibilites & expectations	0%	Mon 5/24/21	Fri 7/16/21
116	<b>Processing &amp; Ongoing Tracking and Management</b>	<b>0%</b>	<b>Mon 5/24/21</b>	<b>Fri 7/30/21</b>
117	Identify, implement process modifications needed	0%	Mon 5/24/21	Fri 7/2/21
118	Identify, implement Accela modifications needed	0%	Mon 5/24/21	Fri 7/2/21
119	Develop workload monitoring tools for staff, supervisors, Liason?	0%	Mon 7/5/21	Fri 7/30/21
120	Define process for team workload monitoring	0%		