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Meeting Summary

The following is a summary of the topics discussed in the DevSTAT meeting on 02/03/2021. 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:

Development Process	6
Permit Volume	6
Commercial Permits: Cycle 1 Durations.....	7
Commercial Permits: Resubmittal Durations.....	8
Residential Permits: Cycle 1 Durations	9
Residential Permits: Resubmittal Durations	10
All Projects: Average Cycle 1 and Resubmittal Durations	11
Average Number of Reviews (Cycle Counts).....	12
Current Performance	12
Transformation Plan Master Schedule.....	13
Task List Summary – Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process..	13
Next Meeting Focus	13

Appendix A – Transformation Plan Top 10 Tasks: Status Detail

ID	Accela Item	iLab Item	Task Name	% Comp	Start	Finish	Predecessors	Notes
2			Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process	10%	Mon 8/31/20	Mon 8/16/21		
3			Establish baseline KPIs	54%	Mon 1/11/21	Wed 2/3/21		
4		✓	Analyze 2020 data	100%	Mon 1/11/21	Mon 1/18/21		
5		✓	Analyze 2018 & 2019 data	75%	Fri 1/22/21	Mon 1/25/21		
6		✓	+ KPI: Application to Permit Ready to Issue	0%	Mon 1/25/21	Fri 1/29/21		
7		✓	Finalize starting baseline	0%	Wed 2/3/21	Wed 2/3/21		
8			Improve ongoing KPI tracking & reporting capability	44%	Mon 12/7/20	Mon 3/1/21		
9	✓		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
10			ID & execute Accela configuration changes to facilitate better data quality and tracking	41%	Tue 1/26/21	Mon 2/8/21		
11			BP auto routing to Sr. Planner for plan review	10...	Mon 12/7/20	Thu 1/21/21		
15			Misc.	0%	Tue 1/26/21	Mon 2/8/21		1) Plan review task status, add 1/2/3/4 to Resubmittal status; 2) Ensure workflow triggering existing
16	✓	✓	Finalize Accela reports & establish Socrata visualizations & Story Page for ongoing KPI tracking &	0%	Tue 1/26/21	Mon 2/15/21	10FF+1 wk	
17		✓	Develop tools & method for ongoing project pipeline management for staff & supervisors	0%	Tue 2/16/21	Mon 3/1/21	16	Tools: Accela task lists, periodic status report Method:
18			Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Tue 3/2/21	Mon 3/29/21	8	
19			CDD	0%	Tue 3/2/21	Mon 3/29/21		Includes Building, Planning, Engineer
20			MUD	0%	Tue 3/2/21	Mon 3/29/21		
21			Fire	0%	Tue 3/2/21	Mon 3/29/21		
22			Change staff plan review styles to a "customer first" approach	0%	Thu 4/1/21	Wed 6/23/21		
23		✓	Develop training strategy for all reviewing disciplines	0%	Thu 4/1/21	Wed 6/23/21		Letter of the law vs. reasonableness
24			Improve submittal quality	0%	Mon 8/31/20	Mon 8/16/21		
25			Improve design professional understanding of submittal requirements - Plans, Checklists,	0%	Wed 1/27/21	Mon 8/16/21		
26			Building Plans	0%	Mon 2/1/21	Mon 8/16/21		
27		✓	Draft a matrix of all submittals and project types	0%	Mon 2/1/21	Fri 3/26/21		
28		✓	Develop Handouts - What makes a good plan submittal? What makes a bad plan submittal.	0%	Mon 3/29/21	Fri 6/18/21	27	
29			First Workshop	0%	Mon 6/21/21	Mon 8/2/21		
30		✓	Plan	0%	Mon 6/21/21	Fri 7/16/21	28	
31		✓	Schedule	0%	Mon 6/21/21	Fri 7/2/21	28	
32		✓	Host Workshop	0%	Mon 8/2/21	Mon 8/2/21	31FS+1	
33		✓	Establish plan for ongoing quarterly workshops	0%	Tue 8/3/21	Mon 8/16/21	32	
34			Storm Water Plans	0%	Wed 1/27/21	Wed 2/3/21		
35		✓	MUD Workshops for SWQCCP	0%	Wed 1/27/21	Wed 2/3/21		
36		✓	Plan Standards and Checklists	0%				
37			Establish minimum application acceptance criteria + establish "when the clocks starts"	0%	Mon 8/31/20	Mon 8/31/20		
38		✓	Storm Water submittals	0%				
39		✓	Deferred submittals	0%				
40				0%				
41		✓	<<<insert iLab items - workshops, checklists, etc	0%	Mon 8/31/20	Mon 8/31/20		

..... 14
Appendix B – Permit Type Definitions 15

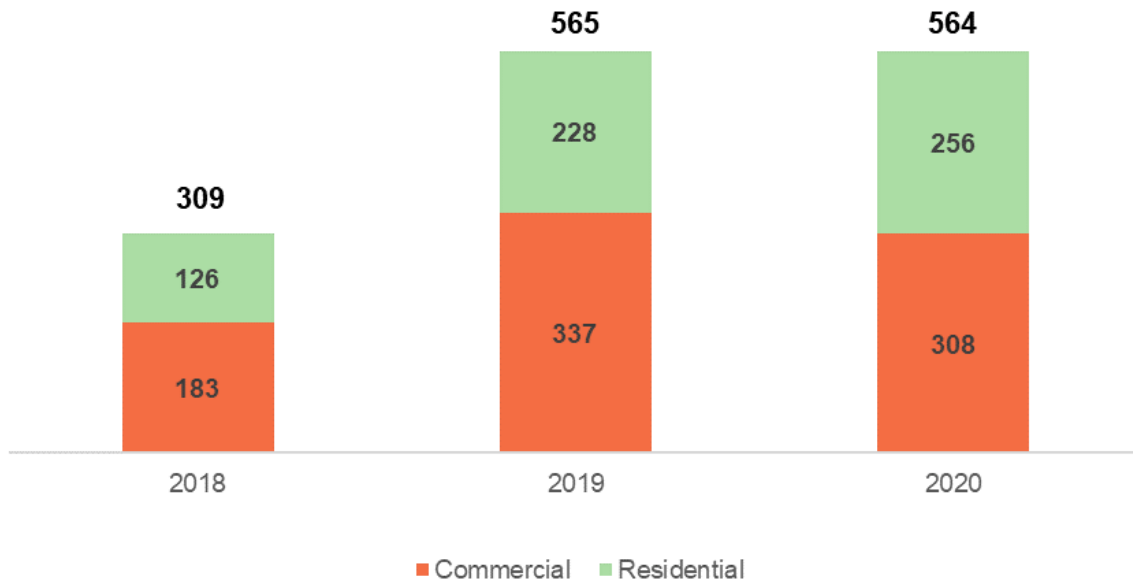
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Development Process

Permit Volume

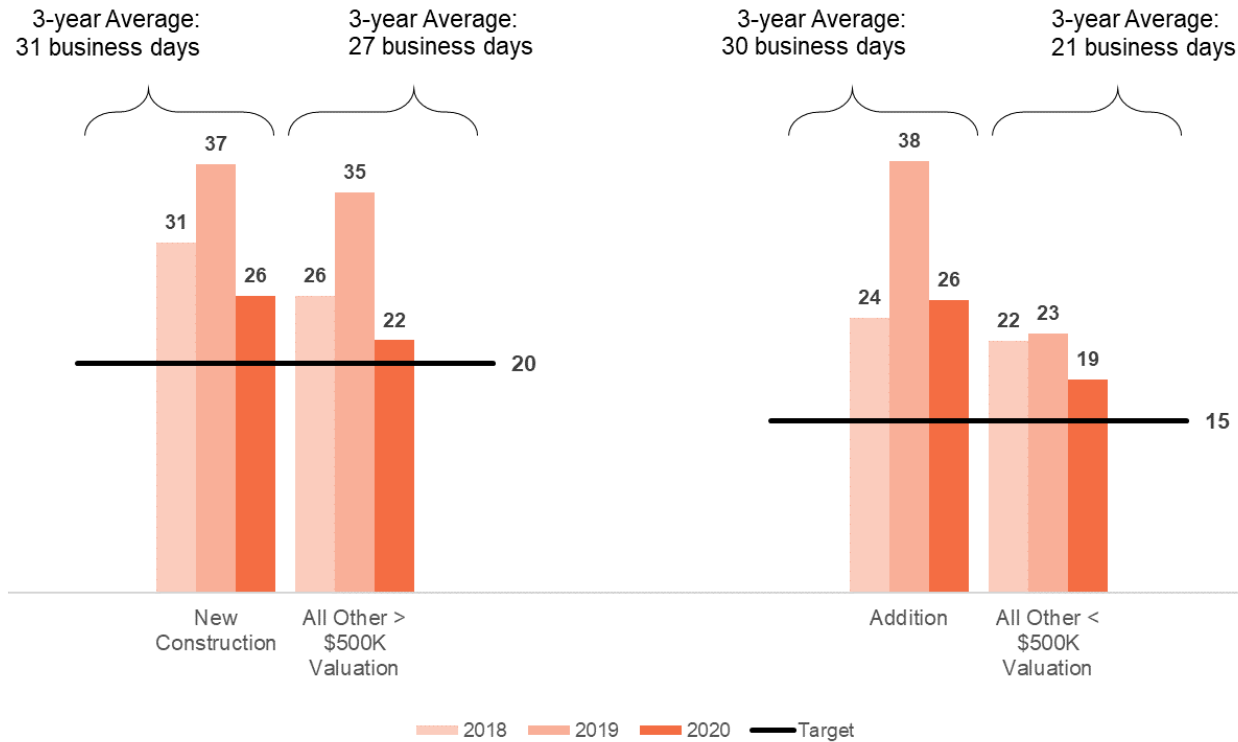
Note: the 2020 data in the following charts and tables covers permit reviews initiated through mid-November.

The volume of permits requiring plan check has increased year-over-year since 2018.



Type	Category	Subcategory	Permit Count			
			2018	2019	2020	Total
Commercial	<i>n/a</i>	New Construction	20	29	37	86
Commercial	<i>n/a</i>	Addition	4	6	4	14
Commercial	<i>n/a</i>	All Other \geq \$500K Valuation	32	48	58	138
Commercial	<i>n/a</i>	All Other $<$ \$500K Valuation	127	254	209	590
COMMERCIAL SUBTOTALS			183	337	308	828
Residential	Multi-Family	New Construction	28	18	25	71
Residential	Single Family	New Construction	20	58	109	187
Residential	<i>n/a</i>	All Other \geq \$30K Valuation	41	79	76	196
Residential	<i>n/a</i>	All Other $<$ \$30K Valuation	37	73	46	156
RESIDENTIAL SUBTOTALS			126	228	256	610
GRAND TOTAL			309	565	564	1438

Commercial Permits: Cycle 1 Durations

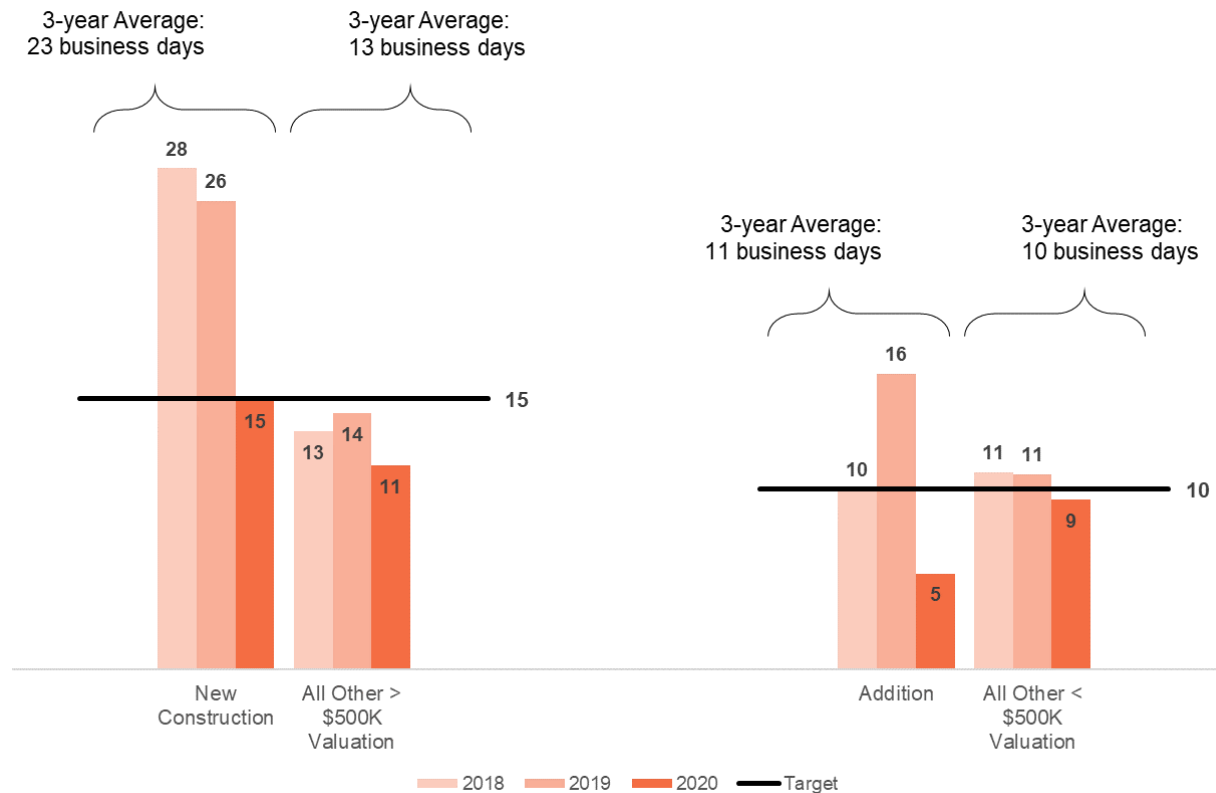


Type	Subcategory	Permit Count				Target First Review Duration (Bus. Days)	Actual First Review Duration (Bus. Days)				First Review - % of Target Met			
		2018	2019	2020	Total		2018	2019	2020	Avg.	2018	2019	2020	Avg.
Commercial	New Construction	20	29	37	86	20	30.6	37.3	25.8	30.8	25%	21%	19%	21%
Commercial	Addition	4	6	4	14	15	24	37.7	25.5	30.3	25%	33%	0%	21%
Commercial	All Other ≥ \$500K Valuation	32	48	58	138	20	25.8	34.9	22.0	27.4	50%	29%	41%	39%
Commercial	All Other < \$500K Valuation	127	254	209	590	15	21.9	22.6	18.5	21.0	48%	40%	39%	41%
COMMERCIAL SUBTOTALS		183	337	308	828									

Notes on the above visuals:

CDD comments that targets are not being met primarily due to lags in data entry when comments are not “closed out” in Accela. There is departmental preference in reviewing the percentage of times target are met as a performance measure, i.e. goal to meet targets 95% of the time.

Commercial Permits: Resubmittal Durations

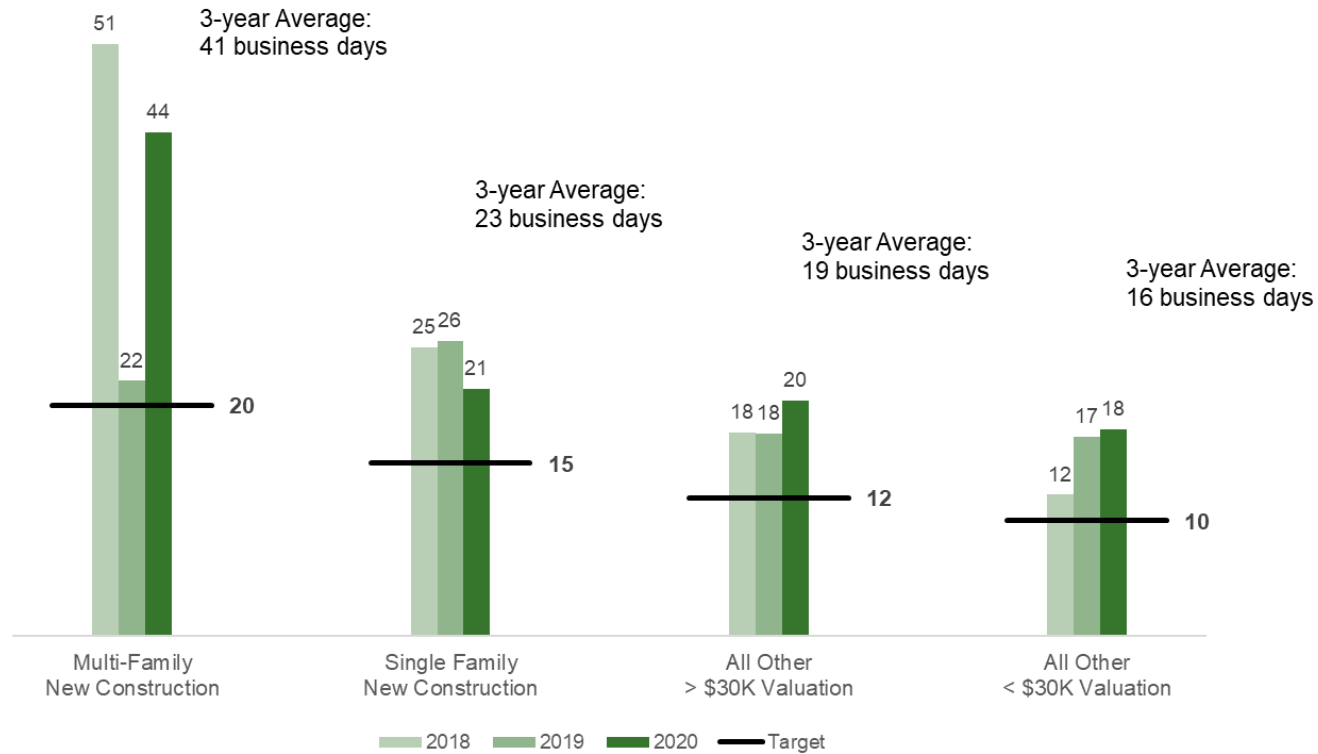


Type	Subcategory	Permit Count				Target Resubmittal Review Duration (Bus. Days)	Actual Resubmittal Review Duration (Bus. Days)				Resubmittal - % of Target Met			
		2018	2019	2020	Total		2018	2019	2020	Avg.	2018	2019	2020	Avg.
Commercial	New Construction	20	29	37	86	15	27.8	26.0	14.9	22.7	43%	40%	61%	48%
Commercial	Addition	4	6	4	14	10	10.0	16.4	5.3	11.4	50%	28%	100%	55%
Commercial	All Other ≥ \$500K Valuation	32	48	58	138	15	13.2	14.2	11.3	12.8	77%	67%	76%	73%
Commercial	All Other < \$500K Valuation	127	254	209	590	10	10.9	10.8	9.4	10.3	66%	65%	67%	66%
COMMERCIAL SUBTOTALS		183	337	308	828									

Notes on the above visuals:

CDD is looking at the permit categories to clarify and streamline as much as possible. For example, “additions” might need to be merged with “new construction.”

Residential Permits: Cycle 1 Durations

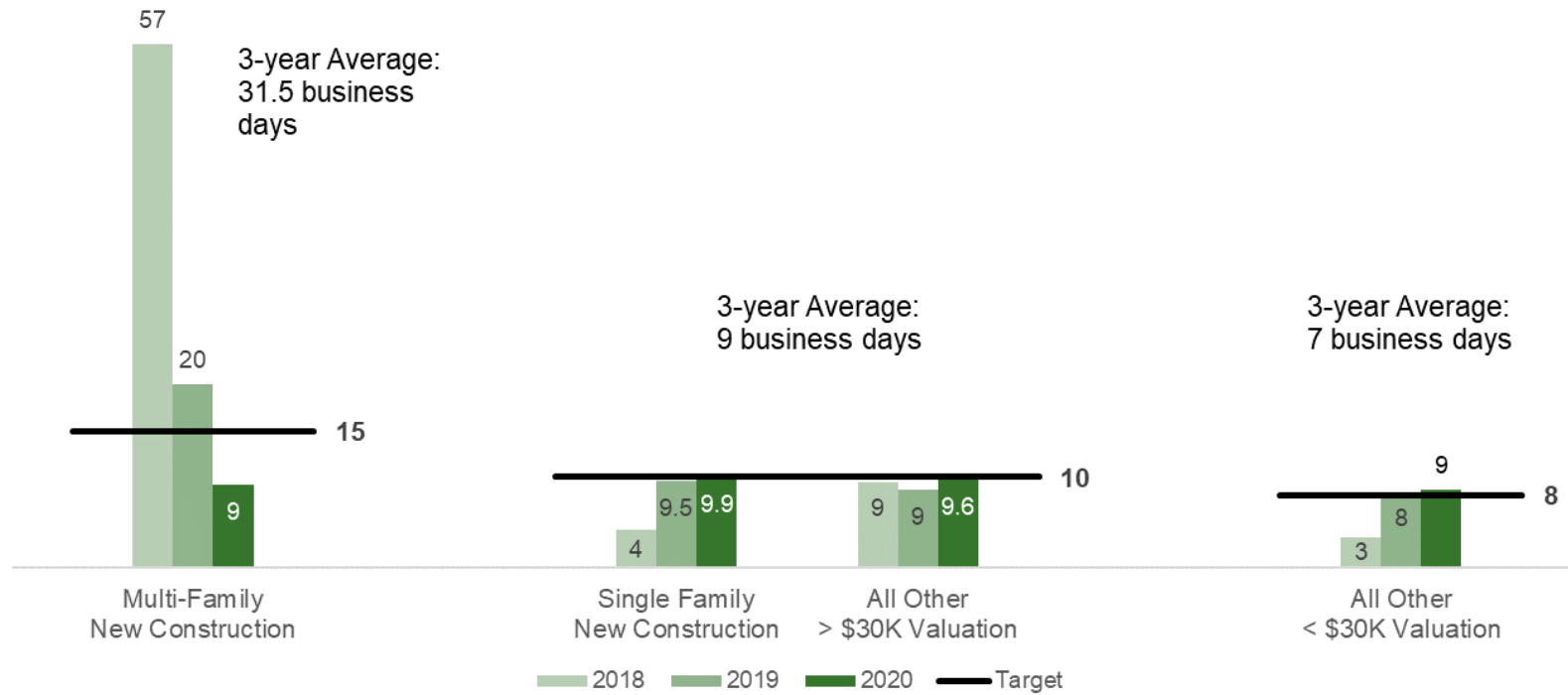


Type	Category	Subcategory	Permit Count				Target First Review Duration (Bus. Days)	Actual First Review Duration (Bus. Days)				First Review - % of Target Met			
			2018	2019	2020	Total		2018	2019	2020	Avg.	2018	2019	2020	Avg.
Residential	Multi-Family	New Construction	28	18	25	71	20	51.3	22.1	43.7	41.2	0%	6%	16%	7%
Residential	Single Family	New Construction	20	58	109	187	15	25.1	25.6	21.4	23.1	40%	38%	33%	35%
Residential	n/a	All Other ≥ \$30K Valuation	41	79	76	196	12	17.6	17.6	20.4	18.7	54%	47%	29%	41%
Residential	n/a	All Other < \$30K Valuation	37	73	46	156	10	12.2	17.3	18	16.3	59%	36%	11%	34%
RESIDENTIAL SUBTOTALS			126	228	256	610									

Notes on the above visuals:

Clarification to the panel that “multi-family” permit count is counted by the physical structure not by the number of units within one structure.

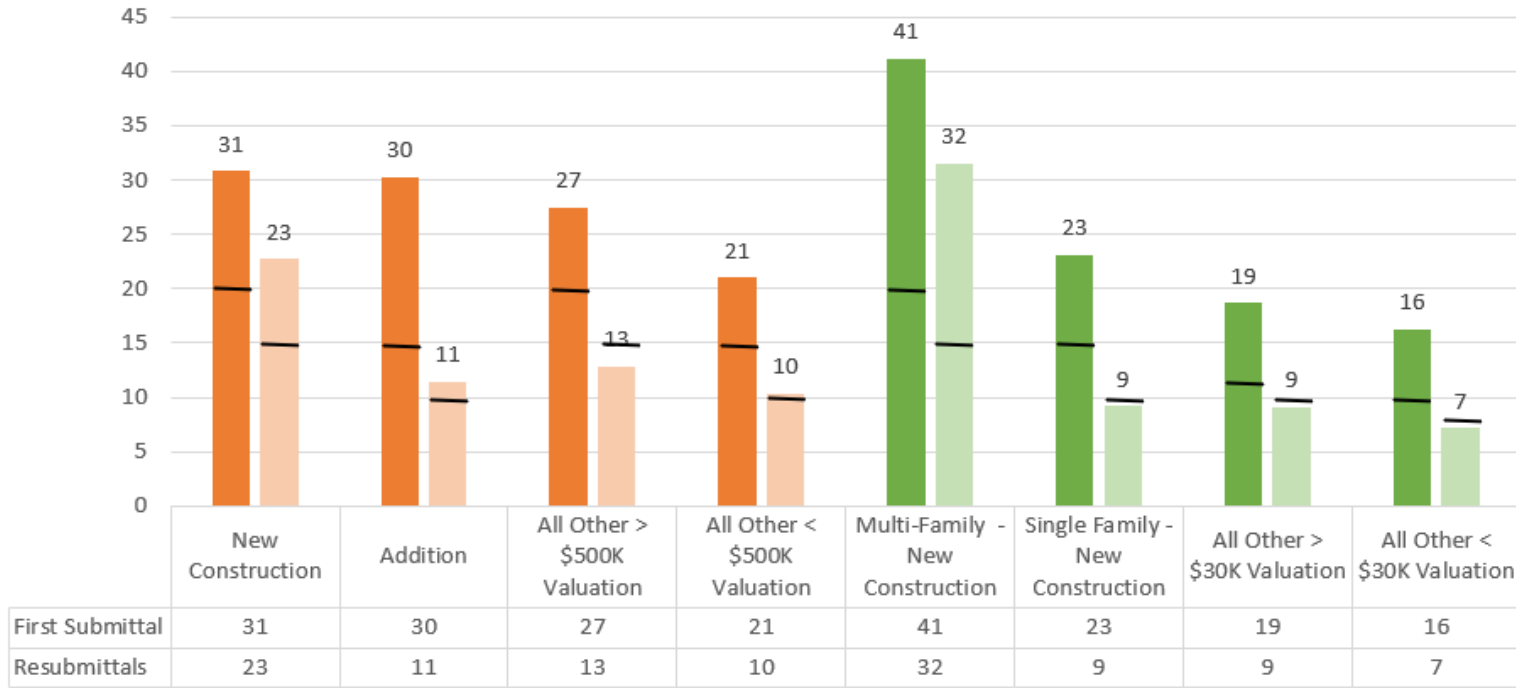
Residential Permits: Resubmittal Durations



Type	Category	Subcategory	Permit Count				Target Resubmittal Review Duration (Bus. Days)	Actual Resubmittal Review Duration (Bus. Days)				Resubmittal - % of Target Met			
			2018	2019	2020	Total		2018	2019	2020	Avg.	2018	2019	2020	Avg.
Residential	Multi-Family	New Construction	28	18	25	71	15	57.3	20.1	9.1	31.5	43%	17%	91%	52%
Residential	Single Family	New Construction	20	58	109	187	10	4.2	9.5	9.9	9.2	90%	60%	60%	63%
Residential	n/a	All Other ≥ \$30K Valuation	41	79	76	196	10	9.4	8.5	9.6	9.1	84%	77%	59%	71%
Residential	n/a	All Other < \$30K Valuation	37	73	46	156	8	3.4	8.3	8.6	7.1	93%	76%	53%	74%
RESIDENTIAL SUBTOTALS			126	228	256	610									

All Projects: Average Cycle 1 and Resubmittal Durations

Average Review Durations (2018-2020)



Type	Category	Subcategory	Permit Count				Target First Review Duration (Bus. Days)	Actual First Review Duration Avg.	First Review - % of Target Met Avg.	Target Resubmittal Review Duration (Bus. Days)	Actual Resubmittal Review Avg.	Resubmittal - % of Target Met Avg.
			2018	2019	2020	Total						
Commercial	n/a	New Construction	20	29	37	86	20	30.8	21%	15	22.7	48%
Commercial	n/a	Addition	4	6	4	14	15	30.3	21%	10	11.4	55%
Commercial	n/a	All Other ≥ \$500K Valuation	32	48	58	138	20	27.4	39%	15	12.8	73%
Commercial	n/a	All Other < \$500K Valuation	127	254	209	590	15	21.0	41%	10	10.3	66%
COMMERCIAL SUBTOTALS			183	337	308	828						
Residential	Multi-Family	New Construction	28	18	25	71	20	41.2	7%	15	31.5	52%
Residential	Single Family	New Construction	20	58	109	187	15	23.1	35%	10	9.2	63%
Residential	n/a	All Other ≥ \$30K Valuation	41	79	76	196	12	18.7	41%	10	9.1	71%
Residential	n/a	All Other < \$30K Valuation	37	73	46	156	10	16.3	34%	8	7.1	74%
RESIDENTIAL SUBTOTALS			126	228	256	610						

Average Number of Reviews (Cycle Counts)

Type	Category	Subcategory	Average # of Submittals			
			2018	2019	2020	Avg.
Commercial	<i>n/a</i>	New Construction	2.8	3.3	2.2	2.7
Commercial	<i>n/a</i>	Addition	2.0	3.3	2.3	2.6
Commercial	<i>n/a</i>	<i>All Other ≥ \$500K Valuation</i>	2.5	2.8	2.5	2.6
Commercial	<i>n/a</i>	<i>All Other < \$500K Valuation</i>	2.4	2.6	2.4	2.5
COMMERCIAL SUBTOTALS						
Residential	Multi-Family	New Construction	2.7	2.7	3.1	2.8
Residential	Single Family	New Construction	2.2	2.7	2.3	2.4
Residential	<i>n/a</i>	<i>All Other ≥ \$30K Valuation</i>	2.3	2.6	2.3	2.4
Residential	<i>n/a</i>	<i>All Other < \$30K Valuation</i>	2.5	2.6	2.4	2.5
RESIDENTIAL SUBTOTALS						

Current Performance

Type	Category	Subcategory	First Review -	Resubmittal	Average #
			% of Target Met	- % of Target Met	of Submittals
			Avg.	Avg.	Avg.
Commercial	<i>n/a</i>	New Construction	21%	48%	2.7
Commercial	<i>n/a</i>	Addition	21%	55%	2.6
Commercial	<i>n/a</i>	<i>All Other ≥ \$500K Valuation</i>	39%	73%	2.6
Commercial	<i>n/a</i>	<i>All Other < \$500K Valuation</i>	41%	66%	2.5
Residential	Multi-Family	New Construction	7%	52%	2.8
Residential	Single Family	New Construction	35%	63%	2.4
Residential	<i>n/a</i>	<i>All Other ≥ \$30K Valuation</i>	41%	71%	2.4
Residential	<i>n/a</i>	<i>All Other < \$30K Valuation</i>	34%	74%	2.5

Transformation Plan Master Schedule

Task List Summary – Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process

Task Name	% Complete	Start	Finish
Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process	13%	Mon 12/7/20	Fri 12/31/21
Establish baseline KPIs	57%	Mon 1/11/21	Wed 2/3/21
Improve ongoing KPI tracking & reporting capability	44%	Mon 12/7/20	Mon 3/1/21
Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Tue 3/2/21	Mon 3/29/21
Change staff plan review styles to a "customer first" approach	0%	Thu 4/1/21	Wed 9/15/21
Improve submittal quality	12%	Mon 1/4/21	Fri 12/31/21

Next Meeting Focus

1. Drill-down into KPI baseline by Department & Division
2. Data: Timeline from Application to Ready-to-Issue / Issued
3. 2020 end of year data
4. Goals based on baseline KPIs

Appendix A – Transformation Plan Top 10 Tasks: Status Detail

Process Reengineering, Project Pigeon							
ID	Accela Item	iLab Item	Task Name	% Comp	Start	Finish	Predecessor/Notes
2			Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process	10%	Mon 8/31/20	Mon 8/16/21	
3			Establish baseline KPIs	54%	Mon 1/11/21	Wed 2/3/21	
4		✓	Analyze 2020 data	100%	Mon 1/11/21	Mon 1/18/21	
5		✓	Analyze 2018 & 2019 data	75%	Fri 1/22/21	Mon 1/25/21	
6		✓	+ KPI: Application to Permit Ready to Issue	0%	Mon 1/25/21	Fri 1/29/21	
7		✓	Finalize starting baseline	0%	Wed 2/3/21	Wed 2/3/21	
8			Improve ongoing KPI tracking & reporting capability	44%	Mon 12/7/20	Mon 3/1/21	
9	✓		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
10			ID & execute Accela configuration changes to facilitate better data quality and tracking	41%	Tue 1/26/21	Mon 2/8/21	
11			BP auto routing to Sr. Planner for plan review	10...	Mon 12/7/20	Thu 1/21/21	
15			Misc.	0%	Tue 1/26/21	Mon 2/8/21	1) Plan review task status, add 1/2/3/4 to Resubmittal status; 2) Ensure workflow triggering existing
16	✓	✓	Finalize Accela reports & establish Socrata visualizations & Story Page for ongoing KPI tracking &	0%	Tue 1/26/21	Mon 2/15/21	10FF+1 wk
17		✓	Develop tools & method for ongoing project pipeline management for staff & supervisors	0%	Tue 2/16/21	Mon 3/1/21	16 Tools: Accela task lists, periodic status report Method:
18			Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Tue 3/2/21	Mon 3/29/21	8
19			CDD	0%	Tue 3/2/21	Mon 3/29/21	Includes Building, Planning, Engineer
20			MUD	0%	Tue 3/2/21	Mon 3/29/21	
21			Fire	0%	Tue 3/2/21	Mon 3/29/21	
22			Change staff plan review styles to a "customer first" approach	0%	Thu 4/1/21	Wed 6/23/21	
23		✓	Develop training strategy for all reviewing disciplines	0%	Thu 4/1/21	Wed 6/23/21	Letter of the law vs. reasonableness
24			Improve submittal quality	0%	Mon 8/31/20	Mon 8/16/21	
25			Improve design professional understanding of submittal requirements - Plans, Checklists,	0%	Wed 1/27/21	Mon 8/16/21	
26			Building Plans	0%	Mon 2/1/21	Mon 8/16/21	
27		✓	Draft a matrix of all submittals and project types	0%	Mon 2/1/21	Fri 3/26/21	
28		✓	Develop Handouts - What makes a good plan submittal? What makes a bad plan submittal.	0%	Mon 3/29/21	Fri 6/18/21	27
29			First Workshop	0%	Mon 6/21/21	Mon 8/2/21	
30		✓	Plan	0%	Mon 6/21/21	Fri 7/16/21	28
31		✓	Schedule	0%	Mon 6/21/21	Fri 7/2/21	28
32		✓	Host Workshop	0%	Mon 8/2/21	Mon 8/2/21	31FS+1
33		✓	Establish plan for ongoing quarterly workshops	0%	Tue 8/3/21	Mon 8/16/21	32
34			Storm Water Plans	0%	Wed 1/27/21	Wed 2/3/21	
35		✓	MUD Workshops for SWQCCP	0%	Wed 1/27/21	Wed 2/3/21	
36		✓	Plan Standards and Checklists	0%			
37			Establish minimum application acceptance criteria + establish "when the clocks starts"	0%	Mon 8/31/20	Mon 8/31/20	
38		✓	Storm Water submittals	0%			
39		✓	Deferred submittals	0%			
40				0%			
41		✓	<<<insert iLab items - workshops, checklists, etc	0%	Mon 8/31/20	Mon 8/31/20	

Appendix B – Permit Type Definitions

Type	Permit Category	Description	Common Issues
Commercial	New Construction	New “ground up” building construction	<ul style="list-style-type: none"> -Aggressive project schedules leading to incomplete submittals to “get started” -Coordination between onsite & offsite improvement plans -Stormwater Quality Control design not completed -Phased construction (i.e. piecemealing permits) -Concurrent Building/Planning reviews, coordination between submittals
	Addition	Additions to existing buildings	-Similar issues as those for new construction
	<i>All Other ≥ \$500K Valuation</i>	Alterations of buildings, Tenant Improvements, installation of equipment, grading and site improvements	-Change of use requirements not discussed w/ CDD ahead of submittal
	<i>All Other < \$500K Valuation</i>	Repairs, maintenance, façade improvements, electrical, mechanical, plumbing standalone permits	-Exterior changes not going through Design Review prior to BP submittal
Residential	New Construction – Multi-Family	New “ground up” duplex, apartments, condos	<ul style="list-style-type: none"> -Moving targets based on funding sources -Aggressive “drop dead” dates for affordable housing projects -ADA accessibility -Fee calculations and credits
	New Construction – Single-Family	New “ground up” single family dwellings	<ul style="list-style-type: none"> -Designers lack of code knowledge -Compliance w/ SB 5 Floodplain regs -PFF fees
	<i>All Other ≥ \$30K Valuation</i>	Alterations, additions, repair and maintenance due to valuations may not include electrical, mechanical and plumbing	-Designers lack of code knowledge
	<i>All Other < \$30K Valuation</i>	Alterations, additions, repair and maintenance; include electrical, mechanical and plumbing, solar and over the counter permits.	<ul style="list-style-type: none"> -Property owners not hiring design professionals -Revisions on solar permits -Work completed without permit (Code Enforcement case)