



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 03/03/2021. 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:

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### **Recent Key Accomplishments**

- Kickoff meeting held between CDD, MUD, and Fire to improve submittal quality & project tracking (2/25). Additional work sessions scheduled to work through details.
  - Held first working session on submittals and submittal completeness on March 2nd with MUD, FIRE, Engineering.
    - Creating tools for the counter staff, e.g. checklists for what to have for a full submittal.
      - Checklist tentative to be completed by the end of March.
  - Question: Are “application” and “submittal” synonyms?
    - CDD: terms are interchangeable.
  - Question: What are the next steps after the workshops?
    - CDD: Rollout to counter tech team (process and procedures to check completeness) then rollout to the planner team. Will work to create and implement the checklist to the public.
- Began testing/verification period for process improvements related to Utility Billing notifications for new projects (3/01)
- Transition made to 100% electronic plan check for Building Permits (3/01)
- *Launched online Overtime Inspection request capabilities.*

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## Deep-Dive: Tasks Required to Improve Building Plan Check Performance

ID	Task Name	% Complete	Start	Finish	Notes
52	<b>Goal: Reduce Duration &amp; Cycle Count of Building Permit Plan Check Process</b>	<b>29%</b>	<b>Mon 8/31/20</b>	<b>Wed 9/15/21</b>	
53	Establish baseline KPIs	100%	Mon 1/11/21	Thu 2/18/21	Completed at 2/18/21 DevStat meeting
58	Improve ongoing KPI tracking & reporting capability	46%	Mon 12/7/20	Fri 4/30/21	
59	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
60	All BP tasks "Public works" renamed to "Engineering"	100%	Tue 2/9/21	Tue 2/9/21	
61	ID & execute Accela configuration changes to facilitate better data quality and tracking	49%	Mon 12/7/20	Tue 3/30/21	
62	BP auto routing to Sr. Planner for plan review	100%	Mon 12/7/20	Thu 1/21/21	02/01/21 - Confirmed working per Planning Manager
66	Accela modifications to support KPI tracking	76%	Mon 2/1/21	Fri 3/5/21	2/22 - No due dates yet, no due date override, target
67	Develop tools for staff and leadership for project pipeline management & tracking - dashboards, reports, etc	0%	Tue 3/2/21	Mon 3/22/21	Rob - Mock up report examples & send to Jason...
68	Establish agreed upon oversight method for tracking due dates and ensuring deadlines are met	25%	Thu 2/25/21	Thu 3/11/21	
69	Plan Checker worksession: Workflow modifications, tools to manage workload/projects, expectations starting 4/01	0%	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,
70	Finalize Accela reports & establish Socrata visualizations & Story Page for ongoing KPI tracking &	5%	Thu 2/18/21	Fri 4/30/21	
71	Improve submittal quality	33%	Mon 1/4/21	Fri 4/16/21	
72	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....
73	CDD/MUD/Fire Worksessions	33%	Thu 2/25/21	Fri 3/19/21	
74	Kickoff: CDD/MUD/Fire brainstorm	100%	Thu 2/25/21	Thu 2/25/21	
75	Worksession 1	0%			
76	Worksession 2	0%		Fri 3/19/21	
77	Intake Triage	5%	Fri 2/19/21	Fri 3/26/21	Need tools for counter staff to make determination
78	Establish minimum acceptance criteria for each project type	5%	Fri 2/19/21	Fri 3/19/21	Tools for counter team use, TWO items: 1) Matrix of submittals required by project; 2) Checklist for minimum requirements for each submittal type
79	Accela modifications	10%	Mon 2/22/21	Fri 3/12/21	2/22 - Target by end of week to be ready to test   Res,Com,MU - Rename task "Application Submittal" to "Application Review", status options include "Submittal Complete" (activates Routing task), Submittal Incomplete (requires notification,
80	Counter Tech worksession: Workflow modifications & intake triage	0%	Mon 3/22/21	Mon 3/22/21	Scheduled
81	Staff trained, Accela changes into Production environment	0%	Mon 3/15/21	Fri 3/26/21	
82	Improve design professional understanding of submittal requirements - Plans, Checklists,	12%	Wed 1/27/21	Fri 4/16/21	
83	MUD Workshops for SWQCCP	100%	Wed 1/27/21	Wed 2/3/21	1/27/21 - ~60 participants in first session
84	Kickoff IWG (Industry Working Group)	0%	Mon 3/1/21	Wed 3/31/21	Developing candidate list
85	Develop Handouts - What makes a good plan submittal? Requirements into customer format.	0%	Mon 3/22/21	Fri 4/16/21	Reassigned to John S.
86	Virtual workshop series	0%			
87	Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Mon 5/3/21	Fri 5/28/21	
88	CDD	0%	Mon 5/3/21	Fri 5/28/21	Includes Building, Planning, Engineering
89	MUD	0%	Mon 5/3/21	Fri 5/28/21	
90	Fire	0%	Mon 5/3/21	Fri 5/28/21	
91	Transition to and promote a "customer first" approach in plan review	25%	Fri 1/1/21	Wed 9/15/21	"Substantial compliance with the code"
92	Transition to 100% Electronic Plan Check	95%	Fri 1/1/21	Mon 3/1/21	
93	Develop training strategy & plan for all reviewing discipl	0%	Thu 4/1/21	Wed 9/15/21	Letter of the law vs. reasonableness / Intent, best pra
94	Goal Tracking & Report	0%	Thu 4/1/21	Thu 7/22/21	
95	Tracking period	0%	Thu 4/1/21	Wed 6/30/21	For First Submittals starting within this period
96	Report on performance for tracking period	0%	Thu 7/22/21	Thu 7/22/21	

Thu 2/25/21

### **Two Week Lookahead (by 3/18)**

- Continue work sessions (CDD, Fire, MUD, PW) & substantially complete draft materials for intake triage.
- Complete Accela workflow modifications related to intake triage & KPI tracking
- Substantially complete Accela tool development (task filters / reports) for staff, supervisors, and gate keeper to monitor project pipeline and due dates

### **Next Meeting Focus**

- Task list progress discussion
- Present jointly developed draft materials for intake triage and project tracking tools
- NOTE: Next data set for Development Plan Review KPIs planned for presentation at 4/22 DevStat meeting for January – March 2021 time period

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## Appendix 1 – Meeting Agenda for Kickoff: Improving Submittals & Project Tracking with CDD, MUD, Fire



CITY OF STOCKTON

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COMMUNITY DEVELOPMENT DEPARTMENT

### Kickoff: Improving Submittals & Project Tracking

02/25/2021

- **Goals for this Effort:**
  - Develop minimum acceptance criteria for all project types for Counter Tech staff to triage Building Permit submittals
  - Develop oversight method to ensure deadlines are met
- **Goals for this Meeting:**
  - Outline an overview of CDD's initial ideas on improvement measures & gather workgroup input - develop a gameplan as a group
  - Identify core team for remaining worksessions to develop required details

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- **WHY: Data Analysis Takeaways - We win or lose as a team: Individual performance vs. project performance**
  - **HOW & WHO**
    - Improving submittal quality through intake "triage"
      - Minimum Acceptance Criteria + Tools for Counter Tech use
      - WHO: SME support to Counter Techs
      - Participation in Process Changes, Accela Modifications, Customer Notifications
      - Outreach & industry partnering
    - Project Tracking – Tools + Winning as a Team
      - Tools
        - Staff
        - Supervisors
        - Gatekeeper / Project Liason
      - Management Method
    - Socrata for tracking and reporting
  - **WHEN: KPI Goals Established for 4/01/21 – 6/30/21**
  - **Next steps & individuals for a short-term working group**