



City Hall ● 425 N. El Dorado Street ● Stockton, CA 95202-1997 ● www.stocktonca.gov

Meeting Summary

The following is a summary of the topics discussed in the DevStat meeting on 03/31/2021. 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

- Rolled out workflow modifications related to application intake review and plan review needed for enhanced KPI tracking in Accela. Reviewed and received input from Permit Tech and Plan Review teams.
- Finalized intake submittal matrix and checklists for counter staff use and for customer information.
- Scheduled meeting with Public Works coordinate Improvement Plan review and inspections.
- Plan review oversight method confirmed – Bi-weekly meeting with Project Liaison and plan review team supervisors to review workload outlook, in-progress performance, identify potential issues, etc.

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Progress Update: Tasks Required to Improve Building Plan Check Performance

Green highlighted items = Must be complete by April 1 tracking period start

ID	Task Name	% Complete	Start	Finish	Notes
52	Goal: Reduce Duration & Cycle Count of Building Permit Plan Check Process	42%	Mon 8/31/20	Wed 9/15/21	
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	64%	Mon 12/7/20	Thu 5/13/21	
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 cycle counts, by task, by permit; §
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	76%	Mon 12/7/20	Fri 4/2/21	
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	100%	Mon 2/1/21	Wed 3/24/21	3/12 - Round two modifications in SUPP, pending RL & JS test...
67	Develop tools for staff and leadership for project pipeline management & tracking - dashboards,	25%	Tue 3/2/21	Fri 4/2/21	Complete - Mock up report examples & send to Jason...
68	Establish agreed upon oversight method for tracking due dates and ensuring deadlines are met	100%	Thu 2/25/21	Thu 3/25/21	
69	Accela changes into Production environment	75%	Thu 3/25/21	Tue 3/30/21	Move to prod 3/26; test & tweak Monday-Wed
70	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, Discussion on tracking and reporting going forward, Discussion on plan check policies/procedures, Bluebeam
71	Finalize Accela reports & establish Socrata visualizations & Story Page for ongoing KPI tracking &	5%	Thu 2/18/21	Thu 5/13/21	
72	Improve submittal quality	66%	Mon 1/4/21	Fri 4/30/21	
73	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....
74	CDD/MUD/Fire Worksessions	100%	Thu 2/25/21	Tue 3/23/21	
75	Kickoff: CDD/MUD/Fire brainstorm	100%	Thu 2/25/21	Thu 2/25/21	
76	Worksession 1	100%	Tue 3/2/21	Tue 3/2/21	
77	Worksession 2	100%	Tue 3/9/21	Tue 3/9/21	
78	Worksession 3	100%	Tue 3/16/21	Tue 3/16/21	
79	Worksession 4	100%	Tue 3/23/21	Tue 3/23/21	
80	Intake Triage	100%	Fri 2/19/21	Tue 3/30/21	Need tools for counter staff to make determination at counter based on project
81	Establish minimum acceptance criteria for each project type	100%	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
82	Accela modifications	100%	Mon 2/22/21	Wed 3/24/21	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, document inco
83	Counter Tech worksession: Workflow modifications & intake triage	100%	Mon 3/22/21	Mon 3/22/21	
84	Plan Reviewer & Supervisor training on Plan Review Tools & Procedures	100%	Tue 3/30/21	Tue 3/30/21	Scheduled
85	Improve design professional understanding of submittal requirements - Plans, Checklists,	24%	Wed 1/27/21	Fri 4/30/21	
86	MUD Workshops for SWQCCP	100%	Wed 1/27/21	Wed 2/3/21	1/27/21 - ~60 participants in first session
87	Kickoff IWG (Industry Working Group)	25%	Mon 3/1/21	Fri 4/30/21	
88	Develop Handouts - What makes a good plan submittal? Requirements into customer format.	0%	Mon 3/22/21	Fri 4/16/21	
89	Virtual workshop series	0%			
90	Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Fri 5/14/21	Thu 6/10/21	
91	CDD	0%	Fri 5/14/21	Thu 6/10/21	Includes Building, Planning, Engineering
92	MUD	0%	Fri 5/14/21	Thu 6/10/21	
93	Fire	0%	Fri 5/14/21	Thu 6/10/21	
94	Transition to and promote a "customer first" approach in plan review	26%	Fri 1/1/21	Wed 9/15/21	"Substantial compliance with the code"
95	Transition to 100% Electronic Plan Check	100%	Fri 1/1/21	Mon 3/1/21	
96	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
97	Goal Tracking & Report	0%	Thu 4/1/21	Thu 7/22/21	
98	Tracking period	0%	Thu 4/1/21	Wed 6/30/21	For First Submittals starting within this period
99	Report on performance for tracking period	0%	Thu 7/22/21	Thu 7/22/21	

Thu 3/25/21

Upcoming and Future Process Improvement Efforts

The topics identified below are intended to provide an overview of additional process improvement areas that CDD is currently working on or has identified for future process improvements. Some areas were identified during the iLab process, others are known topics to CDD. All efforts will be organized around clear goals and prioritized based on highest impact.

- General
 - Select and implement a customer-facing decision tree software to provide increased access to clear and consistent information to customers seeking information on requirements, process, and costs for projects.
 - Estimated timing: start January 2022
 - Utilizing the Socrata platform:
 - Provide a monthly executive summary of key development statistics to senior city leadership (In progress)
 - Provide access to a broad array of development related statistics to city staff and the public.
 - Provide tracking and reporting on Key Performance Indicators related to the development process.
- Building Permits
 - Enhance the Building Inspections process (In progress)
 - Conduct pilot program to test virtual/remote inspections for certain inspection types.
 - Maximize overall efficiency and customer satisfaction.
 - Expand offering of online permit application submittals.
- Engineering Permits
 - Examination of the Improvement Plan process (mini i-Lab, early Fiscal Year 21/22)
 - Plan review
 - Standard criteria for required improvements.
 - Enhance coordination, timing, and tracking of Improvement Plans related to Building Permits.
 - Public Works Department and Community Development will focus on providing additional training to new employees/.
 - Public Works will work to streamline the improvement plan permit review process through a checklist like the intake checklist CDD has recently created.
 - Import remaining development databases into Accela system.
 - Transition to Electronic Plan Check (In progress)
 - Expand offering of online permit applications.
 - Improve permit processing workflows to maximize efficiency.
- Planning
 - Examination of Entitlement process (mini iLab, timing TBD)
 - Working with ASD, pursue process improvements to Business License review process.
 - Residents will have access to self-service renewal of business license as of May 3rd.
 - Discussion around providing additional resources through the self-service portal like checklists and training content to support to residents.
 - Launch online application for Home Occupation Permits (In progress)
 - Expand offering of online permit applications.
 - Improve permit processing workflows to maximize efficiency (In progress)

Three Week Lookahead (by 4/22)

- Complete workload monitoring report(s) to ensure staff, supervisors, and Project Liaison have tracking tools necessary to monitor workload and deadlines.
 - Community Development will begin internal recruitment for Project Liaison position who will manage the coordination of projects between the respective departments.
- Begin discussions revolving around coordination of Business License review

Next Meeting Focus

- Task list progress discussion
- Report out on streamlining of counter service enhancements.