



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 06/02/2021. 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

- CDD Customer Survey link added to Accela Citizen Access Portal
 - Follow-up item: outline a point-in-time survey roll-out/baseline effort. This will enable for consistent monitoring of change over time.
- SolarApp modifications undergoing testing in Accela, including automatic handling of revisions – these modifications will save significant staff processing time and result in instant issuance of applicable residential solar permits
- Automatic payment notifications updated in Accela – Will result in less back-and-forth correspondence required between staff and customers and result in faster permit issuance after payments have been made (for permits not yet configured for online application)
- Proof-of-concept demonstrated to associate multiple permits for the same project within Accela, including putting “gates” in place tying workflow progression together. As an example, a Building Permit may not progress to the final inspection stage without the associated Improvement Plan being issued.

Interdepartmental Process Improvement Updates

- I-Lab scheduled for Fire Operational Permits June 8th
- I-Lab rescheduled for Business License to June 29

Improvement Plans – Detailed Task List

i-Lab Item	Task Name	% Complete	Start	Finish	Notes
	Goal: Improve Metrics & Efficiency of the Improvement Plan process	18%	Fri 5/29/20	Thu 7/14/22	Reduce Duration & Cycle Count of Improvement Plan Check Process, optimize full process
	Rerun pilot Electronic Plan Check project	100%	Tue 2/9/21	Fri 2/26/21	4/07 - All IP plan reviews now electronic, minor tweaks to process ongoing per Thomas

i-Lab Item	Task Name	% Complete	Start	Finish	Notes
X	Plan Check SOP for Bluebeam for Engineering	100%	Fri 5/29/20	Wed 2/24/21	
	Kickoff Meeting	100%	Tue 4/13/21	Tue 4/13/21	Review process as mapped during i-Lab; ID key pain-points; ID path forward
	Establish baseline KPIs - Durations and cycle counts	76%	Mon 4/5/21	Fri 6/18/21	Incomplete data available from Accela based on existing workflow configuration; manually kept tracking spreadsheet available from Engineering team.
	Establish improvement targets based on baseline KPIs and industry standards	0%			??? Benchmarking info not easily available, need to examine in light of FTEs available
X	Develop a list of examples of what constitutes "small" or "simple" projects. (To go along with these criteria:) to help define "small".	0%	Mon 6/14/21	Fri 8/6/21	
	Roles, Responsibilities, Training	13%	Mon 4/26/21	Fri 9/10/21	
	Identify reviews and roles/responsibilities (Matrix)	100%	Mon 4/26/21	Mon 5/10/21	
	Identify training areas for review team	10%	Mon 5/24/21	Fri 7/16/21	Fixture placement (lighting) for property lines, Ann O. on EPC, establish regular training sessions focused on specific topics, utilize "huddles" as-needed
	<i>Group PW plan check checklist into categories, ensure clarity for reviewers of what is within their primary review responsibility</i>	0%			<i>Do we expand to include CDD tasks, utilize 1 checklist for entire (interdepartmental) team?</i>
	Identify PW staff and time spent on plan check for IPs	0%	Mon 5/24/21	Fri 6/11/21	Incorporate into KPI analysis
	Discuss "reasonableness" of comments / intent of code	0%	Mon 6/14/21	Mon 6/14/21	
	Define expectations for plan review & project requirements	0%	Tue 6/15/21	Mon 6/28/21	
	Develop plan review training based on roles/responsibilities & expectations	0%	Mon 7/19/21	Fri 9/10/21	
	Process, Monitoring, Tracking Improvements	4%	Tue 4/13/21	Thu 7/14/22	
	Begin offering applicant plan review meetings to ensure applicants understand plan check comments	100%	Fri 5/14/21	Fri 5/14/21	5/28/21 - Most if not all applicants accepting offer to meet and discuss City comments
	Review routing sheet to ensure team aligned	100%	Mon 5/24/21	Mon 5/24/21	5/24 no comments per team discussion at meeting
	Draft a clear process flow	11%	Tue 4/13/21	Fri 6/18/21	Simplified compared to iLab process flow output
	Oversight / QC - Job Captain?	0%	Mon 6/14/21	Mon 6/14/21	

i-Lab Item	Task Name	% Complete	Start	Finish	Notes
	Identify, implement process modifications needed	0%	Tue 6/29/21	Mon 8/9/21	
	Identify, implement Accela modifications needed	0%	Mon 6/7/21	Fri 7/16/21	Model on Building plan check mods. NOTE: Bluebeam has deadline functionality that can be utilized instead of having the entire team operate in Accela
	Develop workload monitoring tools for staff, supervisors, Liaison?	0%	Mon 7/19/21	Fri 8/13/21	My Tasks filter, project pipeline & workload dashboards
	Define process for team workload monitoring	0%	Mon 7/19/21	Mon 7/19/21	PMO-style? Supervisors only?
X	Determine how to make sure warranty inspections happen reliably. Perhaps inspections reaches out to make inspection appointments.	0%	Sat 1/1/22	Thu 7/14/22	Future
X	Discuss how to involve PW, so Willie doesn't need to respond on PWs behalf about whether new projects impact planned PW projects (where they are, when they are). Could be as simple as being cc'd on emails, but probably is being included in specific mtg.	7%	Sat 5/1/21	Fri 12/31/21	Plan review discussions part of IP process improvement effort
Goal Tracking Period		0%			

Department KPIs

- Building Plan Check – Next report at July 7th DevStat for the 4/01/21-6/30/21 period
- Inspections (Building, PW, Fire, MUD) – Baseline to be established, perform analysis July – August 2021
- Other Engineering permits – Baseline to be established, timeline TBD
- Entitlement processing – Baseline to be established, timeline TBD
- **Improvement Plans - Plan Check Metrics**

Data Limitations Affecting Quality and Content of KPI Analysis:

- No categorization in Accela (large complex project vs. small simple project)
- Accela data can provide cycle (review) counts and duration from application to issuance
- City review duration data based on manually kept spreadsheet by lead engineer

Current data limitations for tracking Improvement Plan will be resolved with creation of workflow within in Accela. Resolution in Improvement Plan data collection and Accela workflow can be expected by Fall/Winter 2021

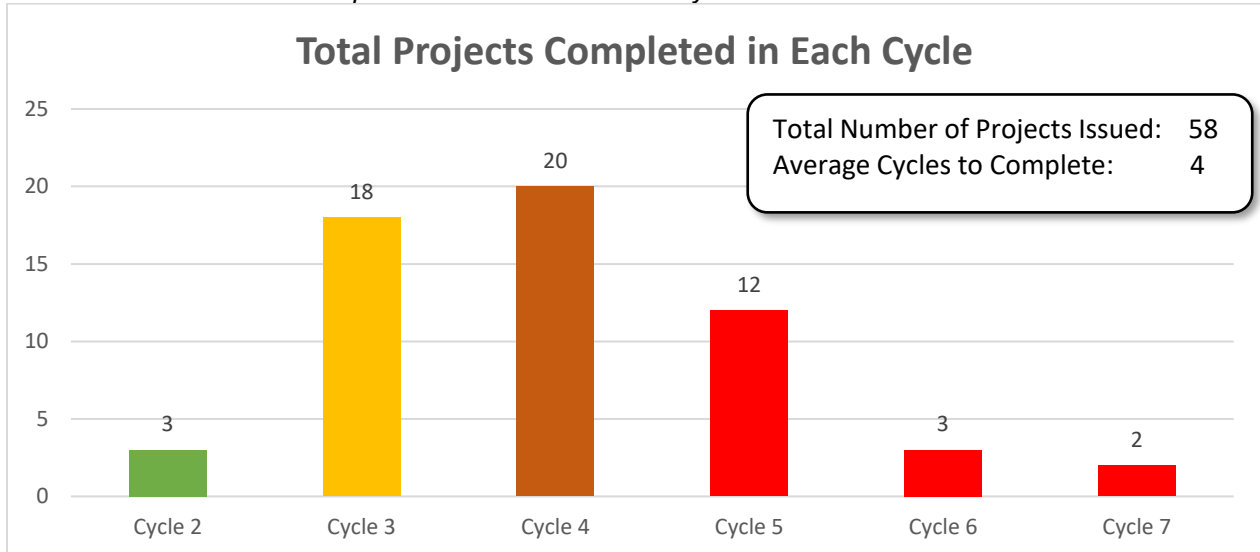
Questions:

- What percent of the process is in each department?
- Are most common errors being tracked?
- Provide checklist from each department and how they process submittals.
- Where are consistencies and differences between processing/requirements?
- Conduct comparison between MUD and PW involvement within improvement plans?
 - What are the differences? What is the root of those differences?

Review Cycles Required to Issue Projects (Source: Accela)

NOTES:

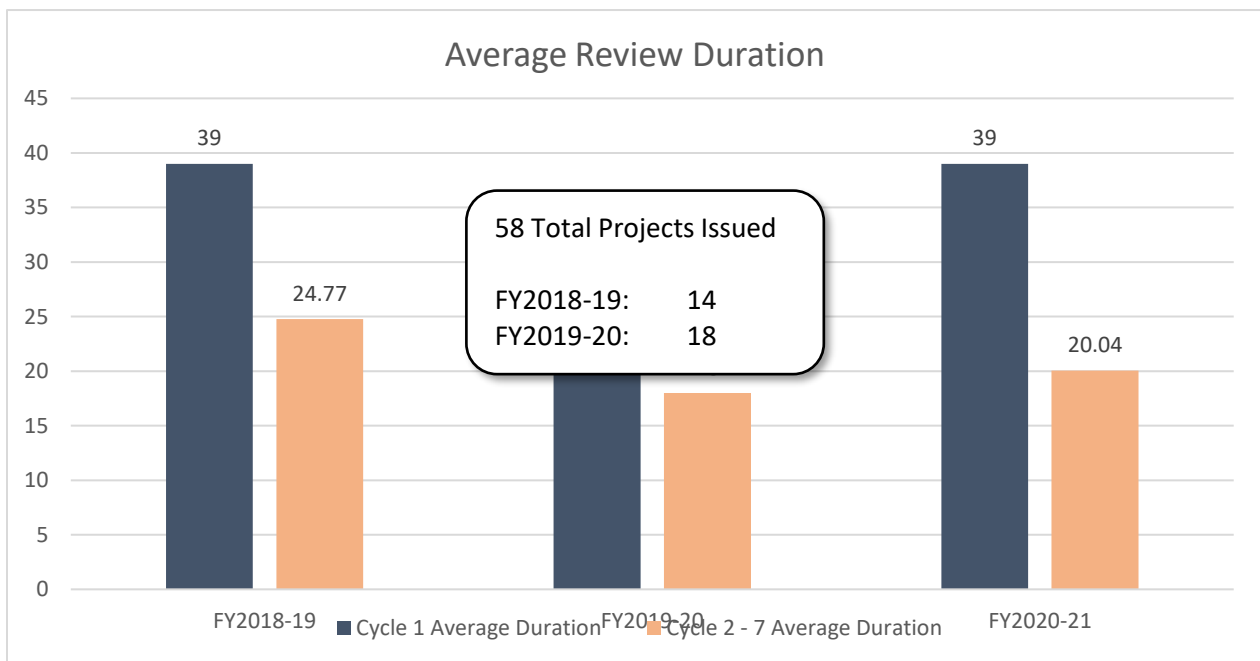
All Data for Fiscal Years 18/19, 19/20, and 20/21
All durations presented are in calendar days



Average Review Durations (Source: Lead Engineer's Tracking Data)

NOTES:

All Data for Fiscal Years 18/19, 19/20, and 20/21
All durations presented are in calendar days



Trending 40 days to review the Cycle 1 review.

- Meeting with applicant after cycle 1 (~20 min consultation with Engineer)

- Need to add support for applicant to resolve questions before they become issues that require more cycles.

Goal: Eliminate the need for cycles 4 – 7 reiteration of improvement plan.

Progress Update: iLab Transformation Plan Items

NOTE: Progress summary not updated due to in-progress task list reorganization. Update to be provide during 6/24 DevStat meeting.

Task Name	% Comp	Start	Finish	Notes
iLab Transformation Plan Items	31%	Fri 5/29/20	Tue 7/4/23	84 Total: 26 complete, 19 in-progress, 34 not started, 5 eliminated
▸ Top 10	66%	Fri 5/29/20	Thu 6/30/22	10 Total: 9 complete, 1 in-progress
▸ Automation	21%	Mon 10/19/20	Tue 7/4/23	28 Total: 6 complete, 7 in-progress, 14 not started, 1 eliminated
▸ Culture Shift	19%	Mon 10/19/20	Thu 12/1/22	22 Total: 7 complete, 2 in-progress, 13 not started
▸ External Engagement	59%	Mon 10/19/20	Thu 6/30/22	9 Total: 1 complete, 3 in-progress, 2 not started, 3 eliminated
▸ Training	48%	Mon 10/19/20	Fri 12/31/21	15 Total: 3 complete, 6 in-progress, 5 not started, 1 eliminated

Status Overview of Active Goals

NOTE: Progress summary not updated due to in-progress task list reorganization. Update to be provide during 6/24 DevStat meeting.

Task Name	% Complete	Start	Finish
GOAL 1: Reduce Duration & Cycle Count of Building Permit Plan Check Process	52%	Mon 8/31/20	Wed 9/15/21
GOAL 2: Reduce Duration & Cycle Count of Improvement Plan Check Process	19%	Tue 2/9/21	Tue 11/23/21
GOAL 3: Analyze Application Intake & Processing for Business License Process	1%	Wed 4/14/21	Mon 9/20/21
GOAL 4: Improve Efficiency in Counter Operations & OTC Permit Processing	35%	Fri 2/5/21	Thu 9/30/21
GOAL 5: Reduce Duration & Improve Efficiency from Permit Issuance to Certificate of Occupancy	0%	Mon 10/4/21	Fri 3/18/22
GOAL 6: Create Expedited Processing Pipeline for High Priority Projects	0%	Mon 8/31/20	Fri 3/18/22

Two Week Lookahead

- Continued Improvement Plan process improvements
- Complete Transformation Plan 2.0 reorganization and share updated progress data based on reorganized task list
- Continue to refine Improvement Plan baseline metrics & KPIs

- Continue to clarify existing plan review resources (how many people we have for this work and how much time it takes them)

Next Meeting Focus

- Process improvement updates / progress
- MUD update on plan reviews

Appendix A – Partial Summary Transformation Plan 2.0

NOTE: The Transformation Plan is undergoing a reorganization to ensure that i-Lab and non-i-Lab tasks are grouped logically and organized for action around central goals and themes. A comprehensive Transformation Plan will be shared upon completion by late June.

Transformation Plan						
ID	TPID	Task Name	% Complete	Start	Finish	Notes
1		Misc.	31%	Mon 8/3/20	Tue 7/4/23	
108		GOAL: Reduce Duration & Cycle Count of Building Permit Plan Check Process	59%	Mon 10/19/20	Thu 12/1/22	
109		Misc.	61%	Mon 10/19/20	Thu 12/1/22	
133		Establish baseline KPIs	100%	Mon 10/19/20	Thu 2/18/21	Completed at 2/18/21 DevStat meet
141		Improve ongoing KPI tracking & reporting capa	98%	Mon 10/19/20	Mon 5/31/21	
165		Improve submittal quality	76%	Mon 10/19/20	Thu 12/30/21	
188		Perform staffing allocation plan to ensure staffing levels are adequate to meet target review durations	0%	Tue 6/1/21	Mon 6/28/21	
192		Transition to and promote a "customer first" approach in plan review	35%	Fri 1/1/21	Wed 9/15/21	"Substantial compliance with the code"
196		Storm Water Related Items	30%	Mon 10/19/20	Thu 12/1/22	
201		Goal Tracking & Report	24%	Thu 2/18/21	Fri 7/30/21	
205		Goal: Improve Metrics & Efficiency of the Improvement Plan process	20%	Fri 5/29/20	Thu 7/14/22	Reduce Duration & Cycle Count of Improvement Plan Check Process,
206		Misc.	63%	Fri 5/29/20	Fri 8/6/21	
220		Roles, Responsibilities, Training	17%	Mon 4/26/21	Fri 8/27/21	
230		Process, Monitoring, Tracking Improvements	6%	Tue 4/13/21	Thu 7/14/22	
241		Goal Tracking Period	0%			
244		GOAL: Reduce Duration & Improve Efficiency from Permit Issuance to Certificate of Occupancy (Inspection phase)	15%	Mon 10/19/20	Thu 12/1/22	
245		Misc.	17%	Mon 10/19/20	Thu 12/1/22	
253		Systems / Technology	14%	Thu 12/3/20	Thu 6/16/22	
265		GOAL: Analyze Application Intake & Processing for Business License & Fire Operational Permits	0%	Wed 4/14/21	Tue 7/4/23	ASD, CDD, Fire, EDD
274		GOAL: Improve Efficiency in Counter Operations & OTC Permit Processing	41%	Mon 10/19/20	Mon 3/7/22	
275		Subgoal: Reduce customer "touchpoints" to extent possible	38%	Mon 10/19/20	Fri 12/31/21	
280		Decision Tree / Permit Discovery Software	51%	Mon 10/19/20	Mon 3/7/22	
290		SolarApp - Immediate permit issuance via outsourced plan check/code compliance verification	17%	Wed 5/5/21	Fri 6/18/21	Outsource Code Compliance Check = Instant permit issuance (save ~ 6 week days for applicant) and 10-15
295		Goal: Create Expedited Processing Pipeline for High Priority Projects	0%	Mon 1/2/23	Fri 4/21/23	
299		GOAL: Enhance GIS / Accela connectivity	25%	Mon 10/19/20	Sat 12/31/22	
305		GOAL: Streamline/Consolidate Document Management System	48%	Mon 10/19/20	Fri 12/31/21	
312		GOAL: Improve Efficiencies in Accela for Planning permits	0%	Thu 9/30/21	Thu 1/27/22	
319		Accela Overhaul	51%	Mon 8/24/20	Fri 7/9/21	
376		Non-Accela Process Reengineering Items	38%	Tue 8/11/20	Wed 3/17/21	
Tue 6/1/21						