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Meeting Summary

The following is a summary of the topics discussed in the DevSTAT meeting on 12/22/2021. 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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Development Process

Statutory Development Review Authority

As discussed at the last meeting, the development process is defined and constrained by multiple levels of regulations and requirements. These aspects inform what is within the City’s control versus those things that the City cannot change. The following table defines the regulatory landscape surrounding the development process.

Statutory Development Review Authority

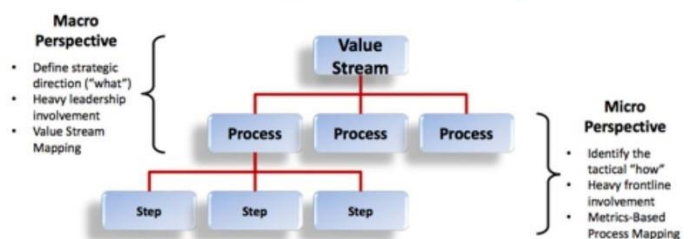
	BUILDING	PLANNING	ENGINEERING	MUD	FIRE	PUBLIC WORKS
FEDERAL	National Flood Insurance Program (NFIP)	Historic Preservation Standards		Safe Drinking Water Act EPA – Industrial Pretreatment		
STATE	Building Code Code of Regulations Other State Regulations (Gov’t. Code)	CEQA Subdivision Map Act Permit Streamlining Act 200-Year Floodplain Regulation Other State Regulations (Gov’t. Code)	Subdivision Map Act CalTrans Standards	NPDES (MS4) - Stormwater NPDES (WDR) - Wastewater Water Board Code CCR 17 & 22 Fire Code Air Pollution Control Dist. SWRCB- Domestic Water Supply Permit	Fire Code Code of Regulations	
LOCAL	Local Ordinance – Administration	Local Ordinance	Local Ordinance Standard Specifications & Plans	Local Ordinance SJC Environmental Health Standard Specifications & Plans	Local Ordinance – Administration & Amendments	Local Ordinance Standard Specifications & Plans

Development Process Value Stream

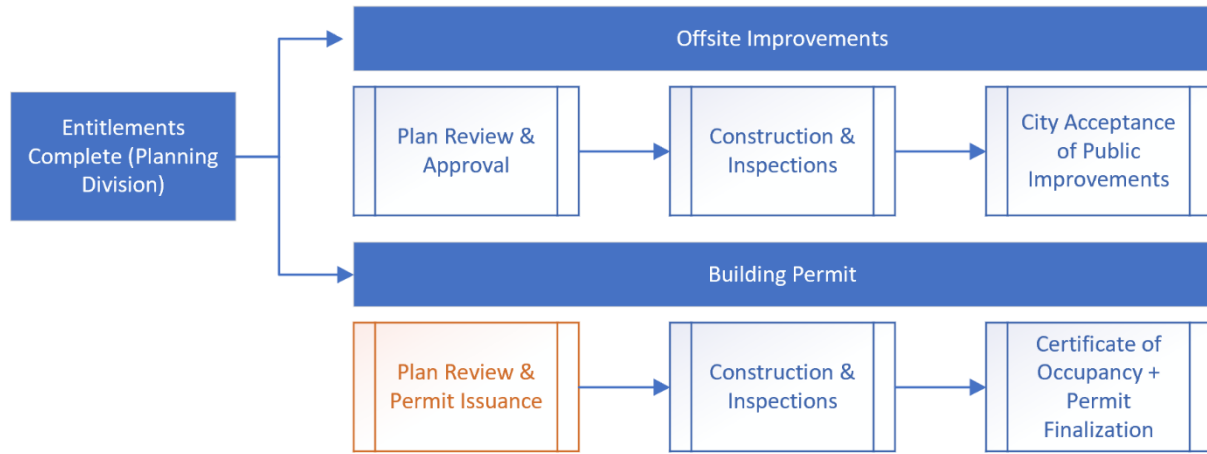
Value Stream Mapping (VSM) is a classic lean methodology for analyzing the Current State and designing a Future State for the series of steps (the “stream”) that take a product or service from its beginning (typically at the “first touch” of the customer’s request) through to customer fulfillment (the “value”).

As the graphic at right shows, Value Stream Mapping is a Macro process, a global overview of a single stream of work. The bridges between individual steps and the Value Stream are the Processes (discrete chunks of steps that perhaps only involve one or two departments or silos of work). Process Mapping is a similar process that looks at these smaller chunks.

Work: Degrees of Granularity



The chart below shows the highest-level processes that makeup the development value stream.

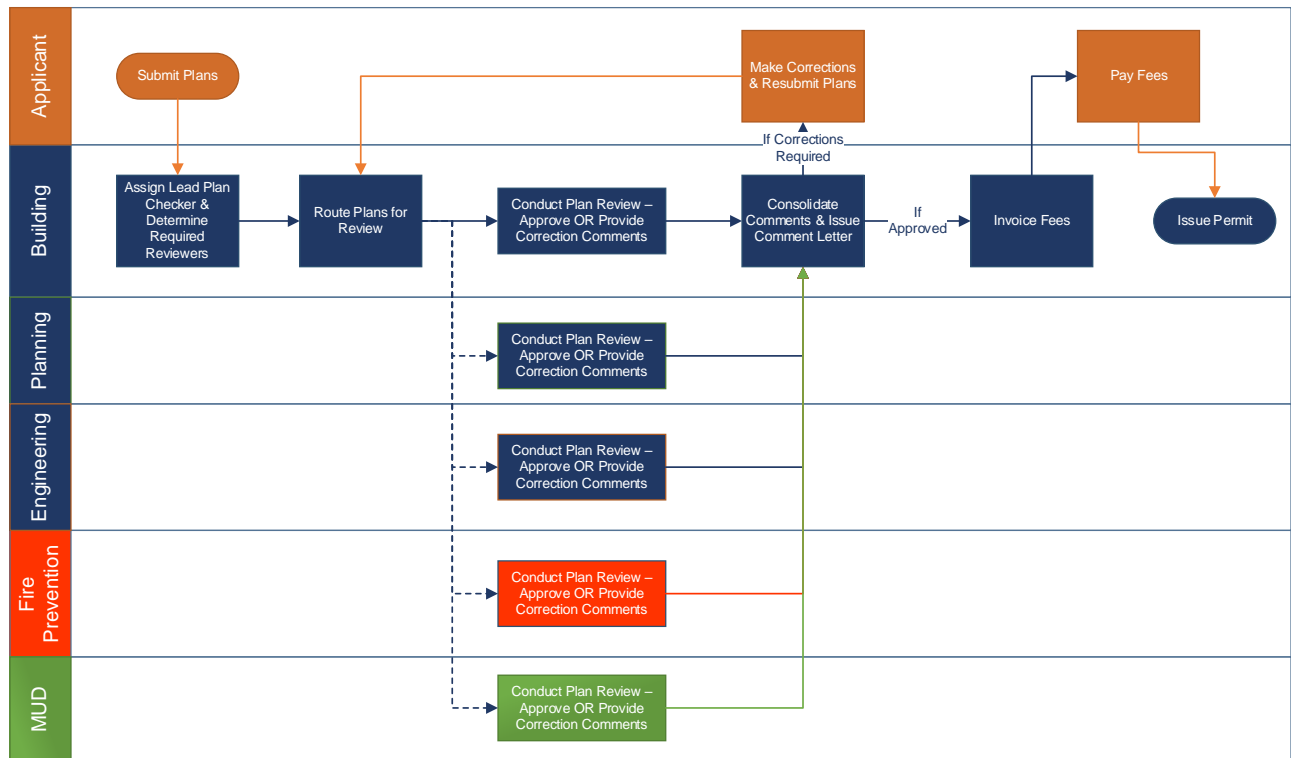


Building Permit Plan Review Process

The chart below shows the next level of process map down from the previously provided value stream map. This process map focuses specifically on the building permit process.

Building Permit: Plan Review Process Overview

12/08/2020



Transformation Plan Master Schedule

Top 10 Tasks

Defined by their relative score for overall benefit and ease of execution

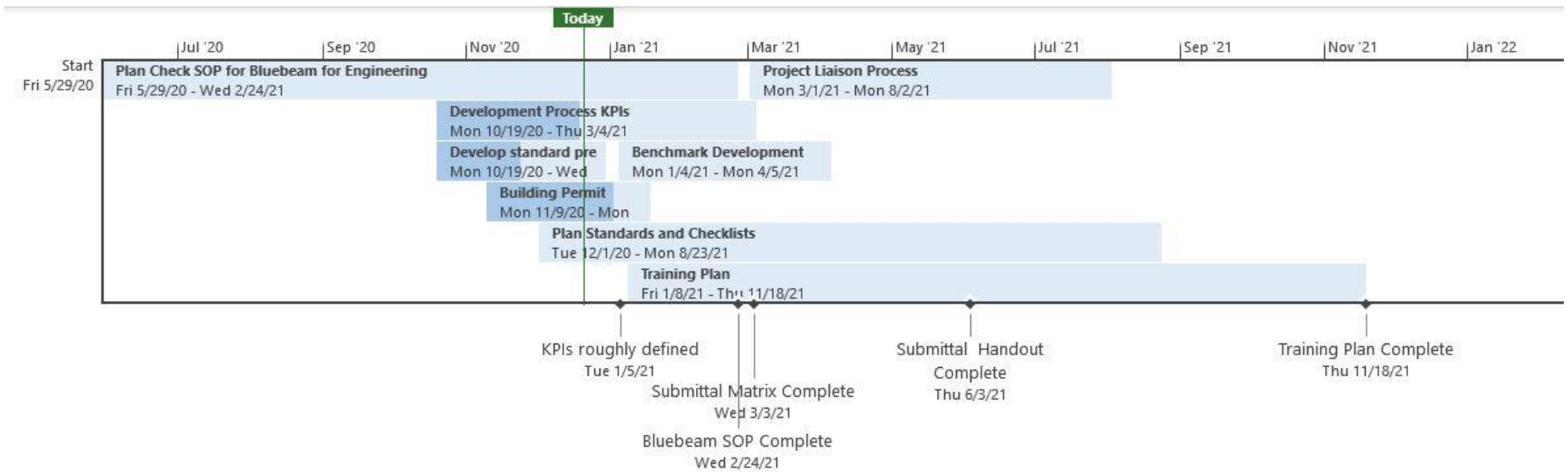
BLUE – represents completed tasks

GREEN – represents in progress and on track

TPID	Task	Benefits	Status
11	Update safe sender list in Outlook to accept Bluebeam emails	<ul style="list-style-type: none"> Prevent delays in plan review by ensuring requests not routed to Junk folder in Outlook 	<ul style="list-style-type: none"> Complete (11/30/20) – Instructions sent to reviewers
68	Update Accela to automatically route Building plan checks to Senior Planner	<ul style="list-style-type: none"> Eliminate assignment bottleneck –expedite task assignment 	<ul style="list-style-type: none"> Partially updated 12/07/20; completion dependent on scripting upgrade ~12/31/20
40	Develop a plan check SOP for Bluebeam to ensure engineers using and respond to all comments (<i>Transition Engineering permits to Electronic Plan Check</i>)	<ul style="list-style-type: none"> Expedite consolidation of comments & correction notice to Applicant Prevent conflicting comments from reviewing departments 	<ul style="list-style-type: none"> SOP Complete (May 2020) <i>Pilot project attempted w/ unsatisfactory results</i> Run new pilot project by mid-January Revise SOP as necessary & transition to full EPC by mid-2021
21	Update Accela to require customers scheduling an inspection through online portal “Leave a message for our Inspector”	<ul style="list-style-type: none"> Gather needed information up-front from person requesting inspection Less coordination/office time needed for Inspectors = more inspections completed per day 	<ul style="list-style-type: none"> IN PROGRESS – Accela technical consultant actively working with Inspection team, target complete 12/30/20
5	Set standards & checklists on Plan Submittals + hold quarterly workshops including SWPPP & SWQCP	<ul style="list-style-type: none"> Identify what is a good vs. bad submittal & provide training to industry Improved first submittals = faster reviews and fewer review cycles 	<ul style="list-style-type: none"> Develop matrix for submittals required for different permits (Q1 2021) Develop industry outreach materials –“What is a good submittal” (Q2 2021) Work with the Builders Exchange for industry training workshops (Q3 2021)
28	Develop & implement Project Liaison Process	<ul style="list-style-type: none"> Provide a point-of-contact for major projects to shepherd project through the various stages/departments/permits of a project 	<ul style="list-style-type: none"> Define the process & parameters (Q2 2021) Pilot then implement the process and modify as needed (Q3 2021)

TPID	Task	Benefits	Status
77	Define KPIs for each portion of the development process	<ul style="list-style-type: none"> • Implement consistent measurements throughout the end-to-end development process • KPIs will be leveraged to identify process performance 	<ul style="list-style-type: none"> • COMPLETE – KPI initial definition meetings with CDD, PW, and MUD • IN PROGRESS – CDD developing recommendation for centralized measurement tracking • UPCOMING – KPI discussion with Fire
32	Develop training plans with a customer-first approach	<ul style="list-style-type: none"> • Positively impact staff culture and orient to a more “customer-first” approach 	<ul style="list-style-type: none"> • IN PROGRESS - Permit Center Counter Operations Brainstorming sessions; goal to cross-train staff & minimize hand-offs of customers • Additional tasks TBD (Target complete 2022)
12	Develop pre-construction agenda and checklist	<ul style="list-style-type: none"> • Standardize pre-construction meetings to ensure key/common items are not missed 	<ul style="list-style-type: none"> • IN PROGRESS – Target 12/30/20)
6	Benchmark City processes (for SWQCP) with other agencies inc. County	<ul style="list-style-type: none"> • Explore if process simplification is possible 	<ul style="list-style-type: none"> • Target start date 1/4/21

Appendix A – Top 10 Project Timeline



Appendix B – Project Overview

PROJECT OVERVIEW

FRI 5/29/20 - TUE 12/20/22



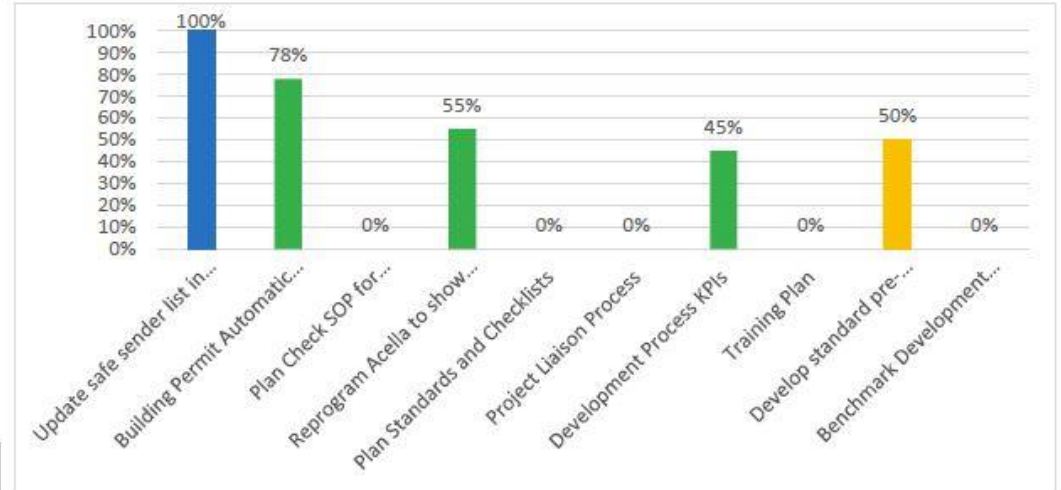
MILESTONES DUE

Milestones that are coming soon.

Name	Finish
Bluebeam SOP Complete	Wed 2/24/21
KPIs roughly defined	Tue 1/5/21
KPI Maintenance Transitioned to Departments	Thu 3/4/21
Submittal Matrix Complete	Wed 3/3/21
Submittal Handout Complete	Thu 6/3/21
Training Plan Complete	Thu 11/18/21

TOP 10 PROJECTS - % COMPLETE

Status for all top-level tasks. To see the status for subtasks, click on the chart and update the outline level in the Field List.



LATE TASKS

Tasks that have started but show no progress, are behind on progress, or are overdue.

Name	Start	Finish	Duration	% Complete	Resource Names
Draft a matrix of all submittals and project types	Tue 12/1/20	Wed 3/3/21	60 days	0%	Rodrigo Flores
Develop standard pre-construction meeting agenda & checklist	Mon 10/19/20	Wed 12/30/20	48 days	50%	Neil Baysinger






























Appendix C – Top 10 Master Schedule

2020_DevelopmentProjectPlan											
ID		Task Mode	Task ID		% Complete	Dept.	Task Name	Duration	Start	Finish	Predecessors
1			1		15%		Top 10	346 days	Fri 5/29/20	Thu 11/18/21	
2			1.1		100%	CDD	Update safe sender list in outlook to accept Bluebeam emails.	28 days	Mon 10/19/20	Mon 11/30/20	
3			1.2		78%	CDD	Building Permit Automatic Routing to Senior Planner for Plan Review	46 days	Mon 11/9/20	Mon 1/18/21	
4					80%		Upgrade scripting to modern scripting language	35 days	Mon 11/9/20	Wed 12/30/20	
5					100%		Update Accela Standard Choices configuration	1 day	Mon 12/7/20	Mon 12/7/20	
6					0%		Confirm changes have worked correctly	1 day	Mon 1/18/21	Mon 1/18/21	4FS+10 day
7			1.3		0%	CDD	Plan Check SOP for Bluebeam for Engineering	174 days	Fri 5/29/20	Wed 2/24/21	
8					100%		Draft SOP	0 days	Fri 5/29/20	Fri 5/29/20	
9					0%		Run pilot project through EPC	25 days	Mon 1/11/21	Wed 2/17/21	
10					0%		Notify section managers	5 days	Mon 1/11/21	Mon 1/18/21	
11					0%		Conduct refresher training	10 days	Tue 1/19/21	Tue 2/2/21	10
12					0%		Conduct one-on-one EPC reviews for the specific project with sections	10 days	Wed 2/3/21	Wed 2/17/21	11
13					0%		Update SOP & redistribute as necessary	5 days	Thu 2/18/21	Wed 2/24/21	12
14					0%		Bluebeam SOP Complete	0 days	Wed 2/24/21	Wed 2/24/21	13
15			1.4.1		55%	CDD	Reprogram Acella to show the Comment box and make it required. "Leave a msg for our inspector".	20 days	Thu 12/3/20	Mon 1/4/21	
16			1.4.2		0%	CDD	Plan Standards and Checklists	171 days	Tue 12/1/20	Mon 8/23/21	
17					0%		Draft a matrix of all submittals and project types	60 days	Tue 12/1/20	Wed 3/3/21	
18					0%		Submittal Matrix Complete	0 days	Wed 3/3/21	Wed 3/3/21	17

2020_DevelopmentProjectPlan

ID	Task Mode	Task ID	% Complete	Dept.	Task Name	Duration	Start	Finish	Predecessors
19			0%		Develop Handouts - What makes a good plan submittal? What makes a bad plan submittal.	60 days	Thu 3/4/21	Thu 6/3/21	18
20			0%		Submittal Handout Complete	0 days	Thu 6/3/21	Thu 6/3/21	19
21		1.4.2	0% CDD		First Workshop	41 days	Mon 6/7/21	Fri 8/6/21	
22			0%		Plan	20 days	Mon 6/7/21	Tue 7/6/21	20
23			0%		Schedule	20 days	Mon 6/7/21	Tue 7/6/21	20
24			0%		Host Workshop	1 day	Fri 8/6/21	Fri 8/6/21	23FS+1 mo
25			0%		Establish plan for ongoing quarterly workshops	10 days	Mon 8/9/21	Mon 8/23/21	24
26		1.5.1	0% CDD		Project Liaison Process	100 days	Mon 3/1/21	Mon 8/2/21	
27		C.1.1.1	0%		Define liaison process and parameters	60 days	Mon 3/1/21	Mon 5/31/21	
28		C.1.1.4	0%		Pilot process and parameters, revise as needed	40 days	Tue 6/1/21	Mon 8/2/21	27
29		1.5.2	45% OPDA		Development Process KPIs	89 days	Mon 10/19/20	Thu 3/4/21	
30		1.5.2.1	100%		Schedule KPI meetings for CDD, PW, MUD, Fire	31 days	Mon 10/19/20	Thu 12/3/20	
31		1.5.2.2	100%		Define KPIs with CDD	4 days	Tue 12/8/20	Fri 12/11/20	30FS+1 day
32		1.5.2.3	100%		Define KPIs with PW	1 day	Tue 12/8/20	Tue 12/8/20	30FS+1 day
33		1.5.2.4	100%		Define KPIs with MUD	4 days	Fri 12/11/20	Wed 12/16/20	30FS+4 day
34		1.5.2.5	0%		Define KPIs with Fire	10 days	Tue 12/22/20	Tue 1/5/21	30FS+10 da
35		1.5.2.6	0%		KPIs roughly defined	0 days	Tue 1/5/21	Tue 1/5/21	34
36		1.5.2.7	0%		Establish KPI reporting log	30 days	Wed 1/6/21	Fri 2/19/21	35
37		1.5.2.8	0%		Report first KPIs in log	8 days	Mon 2/22/21	Thu 3/4/21	36
38		1.5.2.9	0%		KPI Maintenance Transitioned to Departments	0 days	Thu 3/4/21	Thu 3/4/21	37
39		1.5.3	0% CDD		Training Plan	203 days	Fri 1/8/21	Thu 11/18/21	
40			0%		Outline training plans needed	40 days	Fri 1/8/21	Wed 3/10/21	

2020_DevelopmentProjectPlan

ID		Task Mode	Task ID		% Complete	Dept.	Task Name	Duration	Start	Finish	Predecessors
41					0%		Training Group 1	140 days	Thu 3/11/21	Thu 10/14/21	
42					0%		Develop training plan	60 days	Thu 3/11/21	Fri 6/11/21	40
43					0%		Roll out training and revise as necessary	40 days	Mon 6/14/21	Thu 8/12/21	42
44					0%		Develop & implement SOP for training plans as part of onboarding process	40 days	Mon 8/16/21	Thu 10/14/21	43
45					0%		Training Group 2	62 days	Mon 8/16/21	Wed 11/17/21	
46					0%		Develop training plan	1 day	Mon 8/16/21	Mon 8/16/21	43
47					0%		Roll out training and revise as necessary	1 day	Tue 8/17/21	Tue 8/17/21	46
48					0%		Develop & implement SOP for training plans as	60 days	Wed 8/18/21	Wed 11/17/21	47
49					0%		Training Group 3	62 days	Tue 8/17/21	Thu 11/18/21	
50					0%		Develop training plan	1 day	Tue 8/17/21	Tue 8/17/21	46
51					0%		Roll out training and revise as necessary	1 day	Wed 8/18/21	Wed 8/18/21	50
52					0%		Develop & implement SOP for training plans as	60 days	Thu 8/19/21	Thu 11/18/21	51
53					0%		Training Plan Complete	0 days	Thu 11/18/21	Thu 11/18/21	52
54			1.6		50%	CDD	Develop standard pre-construction meeting agenda & checklist	48 days	Mon 10/19/20	Wed 12/30/20	
55			1.7		0%	MUD	Benchmark Development Process	60 days	Mon 1/4/21	Mon 4/5/21	
56			A		0%		Automation	510 days	Mon 10/19/20	Tue 12/20/22	
81			C		0%		Culture Shift	400 days	Mon 10/19/20	Thu 6/30/22	
101			E		0%		External Engagement	400 days	Mon 10/19/20	Thu 6/30/22	
107			T		0%		Training	283 days	Mon 10/19/20	Fri 12/31/21	