



**Problems**

1. Process involves too many steps
- 2a. Process required too many approvals before application can be started for processing
- 2b. Even with all sign offs - stuff still gets missed
- 2c. Require multiple sign offs at almost every step
- 2d. Each step has loop backs and may need to go through all sign offs again
- 2e. Too many people are involved in the process
3. Mistakes are not being corrected by the same person - someone else (clerical staff) will sometimes correct it
4. Authority does not match responsibility (employees are not empowered)
5. Multiple entries made of same information in different places (Adobe form, database, excel)
6. Applications are accepted without exhibits needed for Technical staff
7. Incomplete applications are allowed to be submitted and processed due to political consideration
8. Too much paper floats around - no digital transmission done
9. No formal and efficient process for deeming applications complete - results in incomplete applications being accepted and processed
- 10a. Department Head is needed in all decisions
- 10b. No clear guidelines and policies in place to allow staff members to make consistent decisions
11. No standard written policies and procedures
- 12a. Political pressure can result in creative and or expedient interpretation of the development code
- 12b. Lack of respect/adherence to process due to political pressure
- 13a. Multiple applications forms for same project (some information duplicated on those forms)
- 13b. Applications for same project are submitted separately by the applicant
- 14a. Filing system inefficient - a project has multiple files - filed in different location (drawers)
- 14b. Office configuration does not meet needs of the staff and customers
- 14c. Office setup - makes it hard to make forms & information available in lobby
- 14d. Equipment (e.g. printers and copiers) not close by counter staff - create a delay in customer time
15. Document are changed often and create additional work for clerical staff - update everything again
16. Communication disconnect between upper management and planners - could be regarding change in project or process
17. Inadequate pre-application process/information can lead to incomplete application submittal
- 18a. No electronic tracking system that can be used by all staff
- 18b. Physical location of file not known at all time
19. Communication with other departments/agencies is lacking - inconsistent application of other department standards
- 20a. Interruptions (phones/walk ins/meetings etc) create additional work load
- 20b. No quiet time available to complete tasks
- 20c. Public hours not conducive to completion of tasks
21. Non project/permits/applications tasks draw on staff time effect the availability for current process being documented
22. Volume of assignments exceed staffing levels
23. Conversations with developers are not documented for future reference - not attached to any parcel/address etc.
24. Other department responses are not timely for planning time line
25. The customer does not receive all comments from all departments at the same time - causes customer to think they have received all comments
26. Unreasonable deadlines, given limited staff

**Impacts:**

- 1.i. Too much staff time wasted
- 1.ii. Project delays
- 1.iii. Wasted supplies (paper/toner)
- 2a. Same as 1i & ii
- 2b. Lower quality final product & Same as 1
- 2c. Same as 1i & ii
- 2d. Same as 1
- 2e. Same as 1i & ii
3. Same as 1i & ii
4. Low morale/staff turnover/bad customer service & Same as 1i & ii
5. Same as 1
6. Same as 1i & ii
7. Same as 1i & ii & 4
8. Same as 1
9. Same as 1i & ii
10. Same as 1i & ii & 4
11. Same as 1i & ii
12. Same as 1i & ii & 4
13. Same as 1
14. Same as 1i & ii & 4
15. Same as 1i
16. Same as 1i & ii & 4
17. Same as 1i & ii
18. Same as 1i & ii
19. Same as 1i & ii & 2b
20. Same as 1i & ii, 2b & 4
21. Same as 20
22. Same as 2b & 4
23. Same as 1i & ii
24. Same as 1i & ii
25. Same as 1i & ii & 4
26. Same as 1ii, 2b & 4

## Solutions

- 1.1. Eliminating or consolidating steps by delegating authority to staff
- 1.2. Implementing technology to reduce steps.
- 1.3. Formal training for staff members on technology, policies & procedures
- 2.1.i Require only one set of initials at the Planning Manager level to begin processing
- 2.1.ii Generate electronic report for Deputy Director on a weekly base, updating her on the projects (to be shared with the Department Head at her discretion)
- 2.1.iii Build an automated workflow, which has a level of complexity built in it, for staff reports and other correspondence -where they are initiated by planner and then reviewed by upper management (based on complexity) and back to planner to finalize - it then goes to clerical for proofing and printing.
- 2.1.iv Set up required attachments in automated work flow (AWF)
3. Same as 2.1.iii
4. Department to authorize employees to make necessary decision
5. Making use of technology, have applicants fill out forms electronically and then planner to approve. Information will not have to be re-keyed.
- 6.1. Create and adhere to an electronic or paper checklist for initial acceptance of applications
- 6.2. Provide authority to counter person to accept or reject based on submission
- 6.3. Generate electronic "Complete Cards" - to send to customers informing status of application - accepted or needed documents, etc.
7. Set up the application acceptance system, where application cannot be accepted without all requirements. However, system will have an upper management override for exceptions/ approvals
8. See 2.1.ii, iii, iv & 5
9. See 7
10. See 4
11. Formalize and publish policies and procedures
12. See 7 & 11
13. Create one consolidated application for all permits
- 14.1. Store applications by one project number (hard copy or electronic)
- 14.2. Set policies for hard copy retention (work in conjunction with City Clerks office)
- 14.3. Additional storage space needed - set up central library for documents with a librarian assigned
- 14.4. Additional office space needed
- 14.5. More efficient lobby/counter area
- 14.6. Set up a kiosk in the lobby for public access to information
- 14.7. Have IT assess printer/copier needs at the counter in consultation with planning staff
15. Same as 2.1.iii
- 16.1. Have project planner attend meeting on projects
- 16.2. Formal project debriefing by CD Management for effected project planners
17. Develop a formalized pre-application process
- 18.1. Use the new permit system to track applications with appropriate access for all staff involved (cross departmental)
- 18.2. Same as 14.1, 14.3 and 18.1
19. All development services will be in one department - team building for all involved
- 20.1. Set up appointment schedule for detail planning inquiries/set up pre-application meetings
- 20.2. Hire/train planning techs to be available at the counter to answer question, leaving planner more time to plan check
- 20.3. Re-assess counter hours and staff to better serve public
- 20.4. Segregate counter area from offices

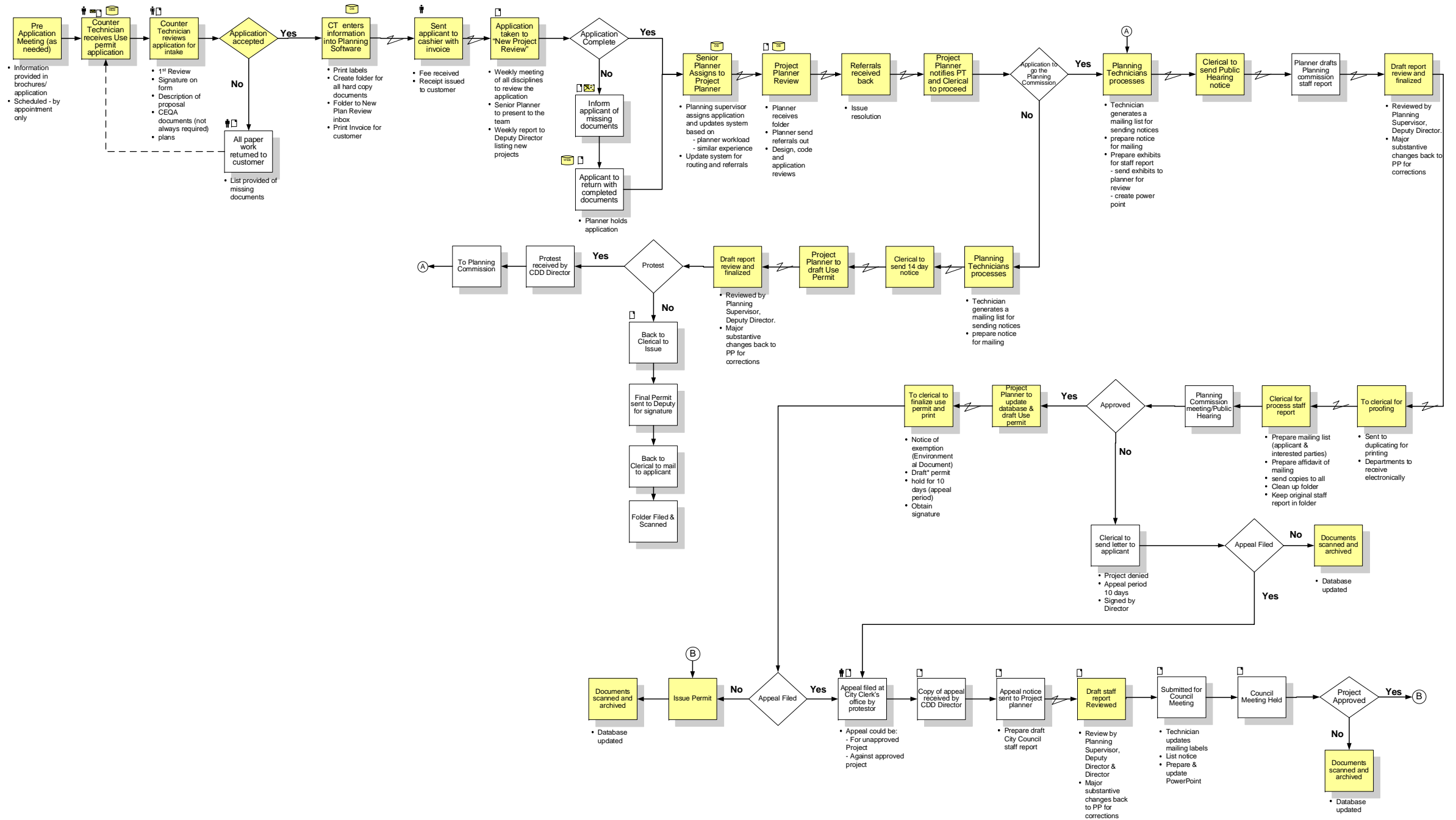
## Solutions cont...

- 21.1 Set priorities for non-project specific staff functions
- 21.2 Track/identify non-project specific duties
22. Evaluate staff levels while implementing identified efficiencies - compare with other cities baselines
23. Using permit software - document conversations with developers - attach to parcel numbers or addresses (document pre-application meetings)
- 24.1. All development staff to work in one department (City re-org) should potentially improve communications and meeting deadlines.
- 24.2. Use permit tracking system to generate reminders for reviews due/overdue
- 24.3. Comments to be electronically submitted
- 25.1. Comments to be sent out through a central source (plan checker) to facilitate conflict resolutions as needed
- 25.2 All development staff from different disciplines to review each others comments to avoid conflicts
- 26.1. Deadlines to be reviewed for reasonability
- 26.2. Same as 22

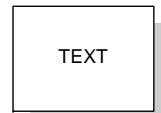
## Benefits

1. Saves staff time
- 2a. Same as 1
- 2b. Saves resources (paper & printing costs)
- 3a. Same as 1
- 3b. Increased accuracy
- 4a. Same as 1
- 4b. Increased job satisfaction
5. Same as 1, 2b, 3b
- 6a. Same as 1
- 6b. Better customer service
- 7a. Same as 1, 2b, 3b, 6b
- 7b. Reduction in application processing time
8. Same as 1, 2b, 3b, 6b, 7b
9. Same as 1, 2b, 3b, 6b, 7b
10. Same as 1, 4b, 6b, 7b
11. Same as 1, 3b, 4b, 6b, 7b
12. Same as 1, 3b, 4b, 6b, 7b
13. Same as 1, 3b, 4b, 6b, 7b
14. Same as 1, 3b, 4b, 6b, 7b
15. Same as 1, 3b, 4b, 6b, 7b
16. Same as 1, 3b, 4b, 6b, 7b
17. Same as 1, 3b, 4b, 6b, 7b
18. Same as 1, 3b, 4b, 6b, 7b
19. Same as 1, 3b, 4b, 6b, 7b
20. Same as 1, 3b, 4b, 6b, 7b
21. Same as 1, 3b, 4b, 6b, 7b
22. TBD after evaluation
23. Same as 1, 3b, 4b, 6b, 7b
24. Same as 1, 2b, 3b, 4b, 6b, 7b
25. Same as 1, 3b, 4b, 6b, 7b
26. Same as 3b, 4b, 6b

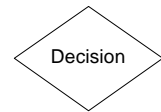
# Rapid Workflow Session 3: Community Development - To Be - Use Permit Process



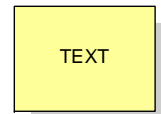
# LEGEND



Task Box -  
Original Process



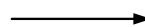
Decision Box



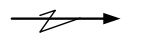
Task Box -  
Revised Process

2,3

Problems



Data Flow - Direction



Electronic Transfer



Hard Copy



Walk-in



Facsimile



Electronic Mail



Regular Mail



Database / System

## Facilitator

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## Participants - Session 1 (March 26, 2008)

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