May 1, 2023

Mayor London Breed
City Hall Room 200
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Dear Mayor Breed:

I am pleased to submit to you the attached Housing Delivery Performance Assessment and Improvement Plan from the Office of the City Administrator, Permit Center Division.

From the fall of 2018 to today, the Permit Center Division has grown and evolved to support our partner agencies, businesses, and residents alike. Because we opened at the very beginning of the pandemic, the Permit Center team pivoted to providing a framework for customer communication and managing the logistics of taking in and returning plan sets while the building was closed. Upon re-opening to the public in July 2021, the digital queuing system and floor management procedures established by the Permit Center allowed for an orderly transition back to in-person Over-the-Counter (OTC) permit processing while behind the scenes, the team worked with our partner agencies to improve digital tools and customer information access.

The Permit Center team is eager to support the Mayor’s vision for achieving the 2023 Housing Element and our permit-issuing partners in their own goals for process improvement in all aspects of the permit process. Several of our ongoing projects are already working towards that outcome, and we look forward to solidifying those improvements and building upon them for the future as detailed in this document.

Sincerely,

Rebecca Villareal-Mayer
Director
Role in Housing Production/Permit Center Background

Given its recent creation and evolving functions, describing the Permit Center’s role in housing production requires some background on the Permit Center. In the fall of 2018, City and County of San Francisco (City) leadership agreed to develop a one-stop shop for permitting in the newest City building at 49 South Van Ness. From 2018 through 2019, City executives and permitting stakeholders developed a charter and identified anchor projects to help set the strategic direction of the Permit Center. All agreed that the Permit Center should be managed by an “independent governance structure led by a non-permitting department.” The City Administrator’s Office took on this function.

The collective mission and vision statements of the overall joint effort of the Permit Center are:

**Mission Statement:** The Permit Center empowers residents and businesses in San Francisco by centralizing and streamlining services that are key to improving homes and properties, opening, and running a business, and planning community events.

**Vision Statement:** Advancing San Francisco as a safe, vibrant, and beautiful city through a friendly, streamlined, and efficient Permit Center serving all our residents and businesses.

To work towards these goals, a small team was created to establish the foundation of the Permit Center and address the immediate need to consolidate 11 departments from 7 different properties into a 39,000-square-foot space. From the start, stakeholders realized that this was more than a real estate project; the physical move provided a unique opportunity to re-envision how San Francisco delivered permitting services to businesses and residents, including but not limited to:

- Developing new principles and standards for delivering in-person customer service.
- Creating uniformity in certain existing services, like cashiering (in-person money handling and accounting policies) and plan review, to enable consistency in delivery and an economy of scale for investments.
- Opening communication channels to encourage more interdepartmental collaboration and joint problem-solving.
- Sponsoring projects to encourage more digitization and business transformation in the permitting space.

**The Pandemic**

The COVID lockdown began in March 2020, four months before the Permit Center was due to open to the public. The pandemic forced the Permit Center Team to re-invent itself to

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1 2019 Permit Center Joint Governance Charter (see Appendix for full charter)
support permitting agencies in continuing services. Departments with paper-based services were effectively halted, departments with first responder responsibility focused on health and safety issues, and a lack of centralized technology hampered small IT teams.

During this time, the Permit Center Team became a consultant, problem-solver, and advocate for the agencies to assist those struggling to advance work during the lockdown. The following are examples of projects the Permit Center Team sponsored, led, or staffed during the pandemic:

- Partnering with DBI to continue Over-the-Counter (OTC) permitting in the parking lot of 1660 Mission.
- Designing OTC permitting with appointment services and plan drop-off at 49 SVN.
- Identifying and establishing contracts for departments to assist with resourcing gaps created by the Disaster Service Worker program and changes to work due to the pandemic.
- Temporarily reassigning customer service staff to DBI to fill vacancies and address backlogs.
- Leading community outreach events to keep customers informed about the evolution of services.

In addition to these successes, the Permit Center Team navigated a consequence of the pandemic response: a backlog of building permits across all the departments. The backlog highlighted systemic issues with highly manual work, inadequate technology, and resourcing. All building permit issuance was impacted, and it took several months to recover once services were established to pre-pandemic status.

By adapting to the needs of each department and managing through each new challenge the pandemic presented, the Permit Center Team learned invaluable lessons about itself, the permitting departments, and the overall landscape of the permitting ecosystem.

The Next Chapter

In July 2021, the Permit Center opened at 49SVN and re-established full in-person drop-in services for over-the-counter permit services. Now that services are re-established to pre-pandemic levels, the Permit Center Team is focused on developing and implementing a strategic roadmap to evolve processes and improve services at a fundamental level.

The Permit Center Team has successfully implemented a handful of transformational initiatives that can be scaled up to include more departments, streamline permitting work across departments, and reduce the overall time to issue permits.

Still, much work remains to move departments from siloed transactional tasks to true end-to-end services that create transparency, efficiency, and better service.
**No individual department can fix the system alone.** Developing housing, advancing business recovery, and making permitting easier can only be successful if all the permitting entities and stakeholders work together. The roadmap to substantively improve permitting across departments includes creating digital alternatives for customers, consolidating redundant internal tasks, automating or eliminating dual entry across departments, democratizing key data, establishing strong governance to promote interdepartmental decision-making, funding large enterprise technology projects to replace legacy systems, and addressing interdepartmental organizational change management needs.

**Performance Assessment**

The Permit Center does not issue permits, but it sponsors work and support systems responsible for streamlining permitting processes that are essential to housing production.

Examples include:
- Leading Electronic Plan Review (EPR) efforts.
- Implementing a centralized cashiering solution.
- Building an invoice and payment system to resolve centralized cashiering gaps.
- Launching an on-site Print Center providing scanning, printing, and copying services.
- Managing work orders with departments like Digital Services and City Performance to support interdepartmental projects.

One specific example of this last item is the Accessory Dwelling Unit (ADU) program, which utilizes a well-designed digital service form created by the Digital Services Team. Permit Center sponsored and funded this implementation, which generated immediate time savings for Planning staff due to improved submission quality by integrating with their system of record, Accela. After the launch of the ADU solution, customer inquiries regarding status requests dropped immediately and noticeably for the Planning Department, allowing valuable staff resource time to be re-invested in reviewing projects rather than answering basic application questions.

Customers have shown an eagerness to adopt digital permitting products. We anticipate growth in customer appetite for digital permitting options.

The graph shows the number of digital submissions through SF.GOV, the City’s website. In addition to digital forms, customers can email plans to DBI for electronic plan review (EPR). The use of EPR
continues to exceed paper submissions. The final quarter of 2022 saw the largest climb in use since its initial launch.

![Chart showing 2021-2023 Electronic vs Paper Plan Review for Intake Projects](chart.png)

**Process Improvements**
The Permit Center drives operational process improvements in parallel with managing in-person Permit Center operations and supporting interdepartmental permit governance. Specific initiatives that will positively affect housing are detailed below.

**Completed Projects**
**Electronic Plan Review with Bluebeam**

**Launched:** April 2020

**Permit Center Roles:** Project Sponsor, Project Manager, Trainer

**Background:** In 2019, the Permit Center assumed the project management of EPR implementation from the Department of Technology (DT), which had partnered with the Planning Department to build a proof of concept with Bluebeam and Accela. The Permit Center leveraged the Bluebeam product procurement and enlisted AECOM to develop an interdepartmental process to review plans in Bluebeam. The process was built upon best practices in other California jurisdictions and involved training 200 users and hundreds of customers. The solution introduced concurrent interdepartmental review internally and created options for parallel review with customers.

**Lessons Learned:** Launching EPR enabled San Francisco to ease into a digital review of construction plans. Staff across permitting departments became comfortable with EPR technology, embraced the standardization of tools, and participated in collaborative decision-making and continuous improvement efforts. Staff and customers have developed a list of enhancements they want to see in the next generation of EPR.
Centralized Customer Service (Zendesk)

Launched June 2021

Permit Center Roles: Project Sponsor, Product Manager, End Users

Background: By December 2020, every department had a substantial pandemic backlog of customer inquiries, managed entirely in various shared Outlook mailboxes. With only the tools available in Outlook, departments struggled to assign tactical work to staff, track inquiries to completion, and ensure no customer inquiries “fell through the cracks.” Permitting departments lacked the tools and the bandwidth to think more strategically to support long-term process improvements. Meanwhile, 311 resources were tied up in pandemic response and unavailable to help permitting departments respond to customer inquiries.

In January 2021, the permitting departments’ need for customer service support had become acute. The Permit Center stepped in to help DBI, leveraging DBI’s existing tools to help permitting departments triage incoming customer inquiries. In practice, this meant the Permit Center Team took on the highly manual work of managing spreadsheets to track inquiry status and shared Outlook mailboxes to send responses to customers.

In the summer of 2021, the Permit Center implemented Zendesk, a scalable, multi-tenant customer service tool. Initially, Zendesk enabled the Permit Center Team to assist departments with general customer inquiries and collect performance data. It quickly proved itself as a valuable tool for more strategic work: aggregating permitting work across multiple customer service entry points, identifying and addressing customer pain points, implementing process improvements to streamline customer experiences, and measuring the success of those process improvements.

Lessons Learned: Since the summer of 2021, the Zendesk program has grown and scaled. DBI has moved its Accessible Business Entrance (ABE), Technical Services Division (TSD), and general customer service inquiries into Zendesk. The Planning Department has moved its Planning Information Counter (PIC), ADU, Shared Spaces, and general intake customer service inquiries to Zendesk. In parallel, the Permit Center Team has developed a formal knowledge base for DBI and Planning customer inquiries. Moving this work to the Permit Center gives time back to the permitting agencies to focus on the specialized work they each perform to review and issue permits.

The Permit Center Team has earned the trust of both customers and staff by providing high-quality, first-level customer support across a range of customer entry points. Every simple customer inquiry handled by the Permit Center frees up bandwidth for more specialized and highly-compensated staff, like DBI engineers and City Planners, to delve into more complex customer inquiries.
Digital Payment Solutions

Launched: July 2020 thru February 2023

Permit Center Role: Project Sponsor, Project Manager, Product Manager, Business Analyst

Background: Centralized cashiering was identified early as a core capability for the Permit Center. Once a new point of sales system was procured, the Permit Center oversaw the implementation of Payment Card Industry (PCI) compliant integrations for permitting departments, including both secure web payment solutions for collecting payments remotely and secure kiosk solutions for collecting payments in person.

As of April 2023, six departments are fully integrated with the payment kiosks. These departments use the kiosk machines to collect in-person payments via credit card, check, and cash.

The Permit Center also created a custom payment application with integrations to all payment channels. The payment application allows an authorized user from a permitting department to quickly create an invoice and for customers to immediately make payment.

The payment application allows departments to create and collect payments securely, prevent duplicate payments, streamline back-office processes, reduce clerical errors, and streamline reconciliation. The payment application provides a flexible option for large departments to collect customer payments in urgent or unusual cases not handled by their existing integrations. For smaller departments, the payment application replaces manually maintained Excel trackers and paper receipt binders.

Lessons Learned: By launching and supporting digital payment products, the Permit Center has enabled real-time billing and payment collection for the Mayor’s Office of Disability (MOD) and the Entertainment Commission (ENT). The Permit Center has also brought the Fire Department (SFFD) into Payment Card Industry compliance for real-time billing and payment collection.

With real-time billing and payment collection, customers have seen the benefits of faster processing times for permit issuance. Staff have also seen the benefits of spending less time tracking and reconciling payments, which allows them to focus on value-added permit review functions.
Digital Queue (Customer Line) Management

Launched: March 2021

Permit Center Roles: Product Manager, Administrator

Background:
Interviews and surveys of customers from 2018 and 2019 found that they desired more predictability for their visits. A new, modern queue management system, QLess, was implemented to deliver on that request.

QLess captures data on customer wait times and staff service times for in-person service, providing departments with detailed insights into their performance. The Permit Center Team transforms data from the queueing system into individual department scorecards to help departments reflect on their OTC performance, identify potential improvement areas, and adjust their staffing levels.

Lessons Learned:
There is a relationship between OTC permitting and housing: Both activities draw from a shared pool of permitting resources. Each permitting department balances the demands of staffing in-person OTC services against back-of-house plan review work-in-progress and backlogs.

By capturing and analyzing QLess service data – across departments and permit types – the Permit Center supports departments in centering San Francisco’s mission-critical, Citywide priorities, analyzing staffing tradeoffs for OTC v. intake, and implementing modifications to OTC service. With its holistic view across permitting departments, Permit Center is uniquely positioned to center the customer experience and drive process improvement discussions.
**Document Management System - Fire**

**Launched:** October 2021

**Permit Center Roles:** Sponsor and procurement lead

**Background:** There is no single document management system for City departments to use. Departments have repositories of digital files that cannot easily be searched or even more challenging, paper files. Fire and the ADM Permit Center Team partnered on implementing Hyland OnBase, which is used successfully by the Offices of the Treasurer & Tax Collector and the Assessor for document management and workflow solutions.

The Permit Center Team worked with DT and vendors to create an environment to enable scalable document management and workflow solutions that any permitting department can leverage. The OnBase implementation for permitting has been designed to allow Fire and any other permitting department to co-exist in a single document management system but maintain their department autonomy and privacy.

Fire designed a document repository for both fire prevention and back-office groups. Their solution integrates with multiple entry points, including copiers, email, and the Fire system of record. All documents are indexed for easy retrieval by staff.

**Lessons Learned:**

Solving a core technology infrastructure issue enables Fire to focus on more important transformational work. Now that the document management system is installed and stable, Fire will begin leveraging the workflow engine to automate and digitalize processes like water flow inspections and pre-application requests, as well as digitizing paper forms.

**Pre-plan check**

**Launched:** July 2022

**Permit Center Role:** Sponsor

**Background:** In the summer of 2022, DBI implemented a Minimum Viable Process (MVP) process for a complete initial plan review of incoming applications. The process included assessing the quality of incoming plan review submissions, assessing the Level of Effort (LOE) for plan review, and prioritizing/assigning work based on LOE.

The goals of the MVP were to:

- Increase clarity, simplicity, and predictability for the applicant.
- Reduce processing time by reducing routing errors, identifying missing application data, and providing guidance to applicants up-front.
- Make data-driven decisions about resource allocation and plan prioritization.

To assist DBI in implementing its Pre-plan check MVP, the Permit Center leveraged its work order with City Performance to provide business engineering support. With that support, DBI was able to make its vision a reality. More support will be required to expand the MVP so that LOE data informs permit processing end-to-end.
In Progress Projects

Work In Progress Report v2.0

Status: In progress – expected completion June 2023

Permit Center Roles: Sponsor, Product Manager

Background: In spring 2022, DBI created a Citywide version of their internal work-in-progress (WIP) dashboard. Now known as WIP 1.0, this dashboard allows internal users to query current plan review work for in-house permits in the Permit Tracking System (PTS). The Permit Center led the rollout of WIP 1.0 to plan review managers in Public Works, PUC, DPH, Fire, MOD, and other internal permitting stakeholders in July 2022.

Prior to WIP 1.0, plan review managers had a limited toolset to track their permitting work. They relied on a combination of outdated, canned static PDF reports from PTS and their own Excel trackers. The Excel trackers, while essential, required duplicative data entry (e.g., permit numbers, staff assignments, permit statuses) which made them both time-consuming and unreliable.

WIP 1.0 was immediately helpful to plan review managers in identifying duplicate records, correcting data entry errors, balancing staff workload, and ensuring no permits “fell through the cracks.” But it has limitations:

• WIP 1.0 lives in the DBI ecosystem, and only DBI Management Information Systems (MIS) staff can support the tool.
• The dataset (only active rows, only in-house permits) is too limited to allow plan review managers to fully retire their PDF reports and Excel trackers.

Getting a full picture of staff workload requires visibility to all permit types; while OTC permits are far simpler to process, they are also far more numerous. Getting a full picture of staff performance requires visibility to past permits as well as work-in-progress.

The Permit Center saw an opportunity for permitting departments to use aggregated permit data to measure performance, set benchmarks, and drive improvements. But realizing this larger opportunity – or even making smaller, more tactical improvements – required moving the data and dashboards out of the DBI ecosystem.

In September 2022, the Permit Center engaged with the City Performance Unit of the Controller’s Office to design and build WIP 2.0.

Lessons Learned: On the front end, WIP 2.0 will give front-line managers a fuller picture of permitting operational data and make performance data more accessible to all internal stakeholders.

On the back end, WIP 2.0 provides the foundation for a centralized, scalable permitting data store. DBI MIS has built a data pipeline that pushes refreshed PTS data to DataSF.
nightly. Public Works is developing a similar data pipeline for permitting data in its Bureau of Street Mapping (BSM) system. All City departments can readily and directly access this centralized data in DataSF, without requesting scarce resources from DBI MIS or Public Works IT. The permitting dataset in DataSF can also readily scale to include additional “rows and columns” of data from PTS and BSM, as well as new datasets from other departments and systems.

From an organizational change management perspective, departments have received the dashboards with excitement and appreciation. Departments want more data to create more transparency, drive decision-making, and increase accountability for their work.

**Site Permit Reform**

**Permit Center Roles:** Sponsor, Project Manager, Business Analyst

**Background:**
On August 15, 2022, the Permit Center, Planning Department (SF Planning), and the Department of Building Inspection (DBI) began a project to review the City's permitting practices and procedures to identify and review opportunities for improvement. The Permit Center completed a case study analysis of other major jurisdictions in California, reviewing how those jurisdictions conduct entitlement and post-entitlement permitting.

The project includes changes to how Site Permits are reviewed and processed by City agencies to eliminate staffing redundancies (such as clerical intakes at both Planning and Building), reduce the overall time it takes to have a fully entitled project, and give applicants a roadmap for all subsequent permits and requirements necessary to start construction. The process would become a new Planning-managed review process ("Development Review Permit"), in line with the best practices identified during a case study analysis of peer jurisdictions.

This project seeks to further three main goals:

1. **To improve the customer experience in applying for a permit(s) with the City.**
   a. Reduce permitting timelines.
   b. Clear and predictable requirements.
   c. Robust workflow management.
   d. Clear expectations for post-approval next steps.

2. **To strengthen the City’s review processes and improve their effectiveness.**
   a. A fully-digital permitting experience with a robust audit trail of decision-making.
   b. Clear procedures for all staff that process permits.

3. **To create flexibility to allow the City’s regulatory bodies to adapt to changing conditions.**
   a. Building Permits are not the City's only tool for permitting.
   b. Codes reflect and incorporate modern tools and technologies.
Information about the Site Permit Reform project can be found at:
https://sf.gov/information/reforming-site-permitting

Timeline

<table>
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<tr>
<th>Date</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>August 15, 2022</td>
<td>Project Charter Published</td>
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<td>September 13, 2022</td>
<td>Updated Project Charter Published</td>
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<tr>
<td>November 16, 2022</td>
<td>Analysis and Recommendations Published</td>
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<td>January 13, 2023</td>
<td>Project Kickoff</td>
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<td>April 19, 2023</td>
<td>Stakeholder Outreach Event</td>
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<td>May 11, 2023</td>
<td>Joint Hearing, Building Inspection Commission, and Planning Commission</td>
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<td>May/June</td>
<td>Introduce Legislation to the Board of Supervisors</td>
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<td>Fall/Winter</td>
<td>Implementation</td>
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Digital Building Permits

Permit Center Role: Sponsor

Background:
The Permit Center and Digital Service partnered early in developing the Permit Center strategy to ensure modern customer experience principles and current research practices were applied to permitting solutions. Since early 2019, Digital Services has conducted research, launched products, and gathered feedback on the permitting experience. See the appendix for the Digital Services research on customer experience and the process map for a building permit.

The current digital building permit project is building upon learnings from past projects to meet these goals:

- Reduce redundant and duplicative work, especially duplicate data entry.
- Increase transparency so customers are aware of the status of their submissions.
- Automate where possible, including adding records to PTS and Bluebeam in real time.
- Standardize and simplify permitting information to improve the customer experience.
- Begin structuring work to enable holistic “project” experiences rather than single-department “permit” experiences.

This project has been rescooped multiple times to find the appropriate scope of work to address organizational change management issues with the transformation of work, align to IT resources availability, and deliver meaningful impact to customers and staff without harming the current timeframes. The deliverables of the current digital building form are as follows:

- Product and project management support from Digital Services.
- New SF.GOV form.
• Integration with DBI system of record, PTS.
• Integration with Bluebeam Studio to setup initial project.
• Architect an environment for building forms, including a database and tools to facilitate customer emails and light workflow.
• Change management support that considers the full permitting lifecycle from application submission to permit issuance.

**Timeline**

<table>
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<th>NOW</th>
<th>Pilot of projects emailed to CPBDBI</th>
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<tr>
<td>Late spring/early summer</td>
<td>New DBI report to replace physical form 3 (pink form) ADU transition</td>
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<tr>
<td>Late summer</td>
<td>Move all full permits to the digital form</td>
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<tr>
<td>TBD</td>
<td>Move remaining in-house (not OTC) permits</td>
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**Electronic Plan Review – Version 2.0**

**Permit Center Roles:** Sponsor and procurement lead

**Background:**
EPR is a complementary component of the digital building form. Once applications are received, there are still many steps to move the application forward, including:

1. Establishing routing and triaging to departments.
2. Plan review by multiple departments.
3. Revising and re-reviewing.
4. Payment and issuance.
The current EPR solution is very manual, and the work described above depends on staff and customers moving the work forward.

The City seeks to enhance the current EPR process to:
- Reduce administrative burden and automate work.
- Improve data quality and staff experience by integrating with multiple systems of record.
- Increase transparency in the process for customers and staff.
- Promote accountability by making better data available.

**Timeline**
Procurement complete by Summer/Fall 2023

**Operational Initiatives**
There is a connection between most tasks and housing creation. Department resources are not organized functionally to work on a certain permit type, so efficiency projects in any area will impact housing creation work. The Permit Center is focused on finding high-value projects that will eliminate barriers to staff performing meaningful work, such as delivering housing units.
**Stale Permit Clean Up - Fire**

**Status:** In progress – expected completion August 2023

**Permit Center Roles:** Sponsor, Project Manager, Administrative support

**Background:**
Stale permits sometimes require attention that gets in the way of managing active work. The Permit Center Team is identifying expired permits for notification, sending out customer notifications, responding to customer inquiries, handing off permits that are ready to close to DBI, and destroying paper plans.

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**PTS 101**

**Status:** In progress – ongoing work

**Permit Center Roles:** Sponsor, Business Analyst, Trainer

**Background:**
Multiple departments use PTS, but users historically have not entered data consistently across (or even within) departments. The Permit Center Team worked with stakeholders across permitting departments – including plan reviewers, frontline managers, data analysts, and IT staff – to develop:

- Guidelines for creating one row in PTS for each round of plan review, given current PTS capabilities and constraints. The Permit Center has completed training staff in the permitting departments on using the new guidelines. Implementation of these initial guidelines gives departments the ability to track the number of reviews each project requires, as well as break down the overall permit processing timeline into days the permit is with City staff v. with the customer.
- Requirements for a small but powerful PTS enhancement to capture the results of each round of plan review as structured data. DBI MIS is actively developing this PTS enhancement.

Once the PTS enhancement is launched, the Permit Center will update the PTS user guidelines and engage in a second round of staff training. Staff adoption of the new guidelines and functionality unlocks many future improvements, including capabilities for:

- DBI to accurately measure the Time to First Review for permits.
- Public Works to consistently flag building permits that will require a secondary right-of-way permit.
- DBI to generate a Permit Issuance Report that only shows the approval rows from the routing table.
- DBI to centralize and standardize intake of revisions.
- All departments to easily identify first reviews v. rechecks, and use that information to better manage staff workload.
- All departments to further improve their understanding of staff time v. customer time as components of the overall time to issue a permit.
Future Projects

Fire Digitalization

Anticipated launch: August 2023

Permit Center Roles: Sponsor, project manager, change manager

Background: Fire is ready to digitize PDFs and processes. They have implemented Hyland OnBase and are working with Digital Services on forms. Fire needs project management and business analyst support to connect the forms, the workflow, and payment into a single solution and then roll out the solutions to the staff and customers. The water flow inspection process will be the first process to move away from the fillable pdf process to a complete digital solution.

Centralized Customer Service 2.0

Anticipated launch: TBD FY24

Permit Center Roles: Sponsor and lead

Background: There are dozens of boutique emails for customers to send inquiries. This requires a customer to be an expert in a process in order to send a question. The Permit Center will begin aggregating common questions so customers can ask basic questions using a single email permitcenter@sfgov.org.

Capacity and Assessment Plan

The City Administrator’s Permit Center Division is responsible for day-to-day operations at the San Francisco Permit Center and delivering a broader interdepartmental strategy to improve permitting.

Day-to-day operations

The Permit Center Team provides in-person customer service support, centralized support for email and voicemail inquiries, enterprise contracting support, and desktop computer support for the Permit Center.

The Permit Center Team can maintain day-to-day operational support of the key programs at current levels with some room to expand the centralized customer service program. However, resourcing in the team cannot support the work volume identified in this report’s process improvement section. Additional resources described below would be required to support the departments in evolving work and centralizing more administrative tasks to the Permit Center allowing department staff to focus on the work of issuing permits. In most cases, these resources exist with the City, but work order agreements and potential funding for those resources will be needed to guarantee commitment to specific permitting priorities.

- 2 customer service representatives (new)
- 1 administrative support position (new)
- 2 technical engineers (resources exist with DT and Digital Services)
- 1 business analyst (resources exist with Digital Services and City Performance)
• 1 project manager (resources exist with City Performance and DT)

Strategy, modernization, and transformation
The technology supporting land use and construction permitting is antiquated and needs modernization. Procurement and modernization strategies are not contemplating interdepartmental collaboration at the scale needed to advance real change. Furthermore, budget and personnel availability are anticipated to be an issue in the upcoming years due to an economic downturn affecting department revenue and collections.

Replacing PTS and Accela and architecting a technology solution to unify the interrelated work requires support from the executive level of San Francisco to ensure a different outcome from past projects. Support includes the following:

• Support a new governance model to guide high-risk technology initiatives, enforce collaborative decision-making, and address centralized funding for interdepartmental projects.
• Resourcing through funding or re-assignment to assist with project management, business research, and analysis support.
• Funding for consultants and their professional services to guide San Francisco to successfully implement an enterprise land use system.
• Funding for technology products to meet the shared vision of a modern enterprise land use permitting system.
• Resourcing, funding, or re-envisioning department-level application support for ongoing solution maintenance after implementation.
• Resourcing, funding, or assignment of internal resources to implement and support an IT architecture that addresses different systems of record, databases, and departmental IT resources.

A report on recommendations to source and implement a more efficient system for tracking construction permits under review by the City will be submitted separately.

Organizational Change Management (OCM)
Permitting is at an inflection point. Evolution will require some centralization, an extreme paradigm shift for the department cultures that have been largely autonomous and siloed. An intentional organizational change management plan is a critical component in improving housing delivery to ensure:

1. There is a City-wide alignment of strategies to meet the needs of mission-critical goals.
2. Transformational leaders are identified, nurtured, and utilized to drive change across the permitting ecosystem.
3. Every level of each department is being empowered to innovate and contribute to the broader goals of the City not just the core work of their unit or department.
The Permit Center is seeking initial funding for OCM consulting in FY24, but the amount requested will not adequately address the City’s wider needs. It is recommended that the City consider resourcing a formal OCM program across all the permitting divisions to help accelerate the culture changes needed to transform services.
Permit Center Housing Delivery Performance Assessment and Improvement Plan

Appendices
2019 Permit Center Joint Governance Charter
Permit Strategic Project Portfolio

Research Artifacts
Accessory Dwelling Unit (ADU) Experience Map
Building Intake Permits – Service Blueprint
City and County of San Francisco
Joint Governance Charter
for
Cross-Department Permit Center

(Prepared by: Melissa Whitehouse)
05.10.19
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1.0 Background

Construction, business, and special events permits in the City and County of San Francisco (CCSF) involve over 18 separate departments located across the City. Requirements for permits are often complex and confusing for non-frequent customers, leading to customers applying for incorrect permits and or incomplete applications. This results in increased backlogs in permit applications, frustrated customers and permitting staff.

San Francisco will open a new 49 South Van Ness (49 SVN) office building located on South Van Ness Avenue between Market and Mission Streets in spring/summer of 2020. The 16-story 430,000 square feet City Office Building will provide a new centralized one-stop permit center on the second floor, where construction, special events and business permitting are issued for residents and business owners. Floors 3 to 16 will provide new office space for approximately 1,800 employees from the major permitting departments in the City. Permitting for special events, construction and business permits will now mostly be completed in one building both back and front of office work. Co-locating permitting departments under one roof will allow for greater collaboration and efficiencies between departments.

In conjunction with the new Permit Center, the city is working on permitting process improvements, such as centralized cashiering, digital permitting, and a new queue management system to help organize the Permit Center and improve the customer experience. The Permit Center’s success is contingent on departments working together to improve permitting process flows, in particular permits for projects spanning multiple departments. To ensure the Permit Center is friendly, streamlined and efficient the city will need to be coordinated, strategic and organized as we move to this new space.

2.0 Joint Governance Mission and Vision Statements

The collective mission and vision statements of the overall joint effort of the Permit Center are:

**Mission Statement:** The Permit Center empowers residents and businesses in San Francisco by centralizing and streamlining services that are key to improving homes and properties, opening and running a business, and planning community events.

**Vision Statement:** Advancing San Francisco as a safe, vibrant, and beautiful city through a friendly, streamlined, and efficient Permit Center serving all of our residents and businesses.

3.0 Joint Governance Goals and Objectives

The collective goals to implement our mission and vision statements for the Permit Center include:

- Streamline permitting process and eliminate barriers to cross departmental collaboration;
- Empower staff to deliver excellent permitting experiences;
- Provide equipment and tools to facilitate better permitting experiences for both staff as well as customers;
- Promote data centric decision making to further innovation

The collective objectives to implement our mission and vision statements for the Permit Center include:

- Enable customers to come for construction, special events, and business permits and not need to go anywhere else;
- Provide clear, consistent information and roadmap on processes for the customer;
- Ensure shortly after arrival (or even before you arrive and are on the first floor) someone greets you and helps you get into a queue or answers a basic question on the building / Permit Center;
- Have well-trained staff who receive regular training on providing excellent customer service;
- Reduce the amount of manual data entry currently taking place across departments;
- Standardize hours of operation for regular stations and ensure staffing during those hours;
- Move payments online, to the full extent possible, while still providing other payment options including in person and mail;
- Ensure departments are able to electronically review plans concurrently whenever possible; meaning, every plan reviewer can access the system at the same time, concurrently review plans, and add comments for a consolidated issuance to the customer;
- Provide the option for customers to complete the majority of their permit application process online, if they choose to do so;
- Seek to reduce the need for customers to physically come to the Permit Center if they prefer to interact with the City electronically and it is legally permissible;
- Have customers come to the City website to obtain a permit (rather than one or even multiple individual department websites;
- Make it so that a customer doesn’t have to know which department they are interacting with – just that they need to get a permit issued from “the City” to open their business, do their home improvement, or hold a community event; and
- Have a centralized cashiering solution that creates strong financial accountability and standardization across all departments.
- Establish and support stronger cross departmental data standards;
- Ensure the availability and use data is pervasive; and
- Centralize as many public permitting related functions onto the second floor of 49 South Van Ness as possible to minimize customer confusion.

The above goals and objectives are high level; as details on specific proposals are further developed, they will be brought to the Executive Committee for input and review.

4.0 Joint Governance Scope
- Set and approve of policy and direction for the second floor Permit Center at 49 SVN;
- Approval and oversight of joint process and system projects involving two or more of the departments; and
- Escalation point for cross-department operational issues and decisions.

5.0 Organization and Governance Structure
Department leaders from all eight regular station departments support the joint mission, vision, goals and objectives and understand that a joint governance structure will ensure coordination and accountability. These main stakeholder departments include the Offices of the City Administrator, Controller, Building Inspection, Planning, Public Works, Fire, Public Utilities, Public Health, and Economic and Workforce Development.

5.1 Roles
The following roles have been identified for joint governance:
- Executive Committee Member
- Steering Committee Member
- Permit Center Team
### Executive Committee Member

The Executive committee will approve and oversee all joint projects and projects that involve multiple business areas or are high visibility.

Key responsibilities include:

- Approves and sets the vision and high level objectives
- Ensures alignment and integration with the business planning process and provide adequate staffing, funding and commitment to initiatives
- Oversees discretionary spending and authorizes the provision of positions / funds / resources (internal or external)
- Approves major business project proposals
- Monitors progress of project investments and may suspend or cancel major projects as necessary
- Resolves escalated issues around policy or resources
- Helps the Permit Center project team to prioritize around limited resources of time, staffing and budget
- Provides and empowers adequate staff contacts for Permit Center staff to move forward with most day-to-day issues (including both high level contacts for strategy and policy matters, as well as more operational staffers that are knowledgeable about the day to day operations on the floor of the Permit Center)
- Ensures staff across their department know that the Permit Center project is a high priority both for them and the city as a whole
- Communicate any questions or concerns that they or their department staff have on the project to the Permit Center team as needed so they may address them

**Steering Committee Member**

The Steering Committee will provide information, monitor projects and assist the Permit Center team with prioritizing activities.

Key responsibilities include:

- Assists in defining initiative objectives, scope, and stakeholder involvement
- Ensures that projects are business-driven to successful implementations of planned business changes and that resources and priority conflicts are resolved to minimize plan disruption
- Approves non-major business project proposals within scope of responsibility
- Develops project proposals to be reviewed and approved by Executive Committee
- Oversees all joint projects (including tracking of progress against readiness)
- Prioritizes activities within a single project
- Resolves priority or resource conflicts within the approved project budget and scope
- Oversees and identifies the allocation of resources and staffing for the Permit Center project to be approved by appropriate members of the Executive Committee
- Establishes and reviews data and metrics across departments
- Keeps respective department Executive Committee member informed of any risks and/or issues in-between meetings
- Works with the Permit Center team to problem solve as issues arise minimize the number of issues that need to be taken to the Executive Committee meetings

**Permit Center Team**

The Permit Center Team is responsible for overall project management and Permit Center operations.

Key responsibilities include:

- Works to develop the above cross departmental proposals, goals, budgets, policies and etc. for the Steering Committee and Executive Committee members
- Because there are up to 18 different departments involved in permitting citywide (and 8 regular station departments in the physical Permit Center), the Permit Center Team seeks to own the customer experience for permitting around process and flow both physically and digitally (as opposed to plan / code review or permit issuance / approval, which are the purview of the permitting departments)
- Coordinates procurement and deployment for common or shared business tools
- Provides a Point of Contact for departments to escalate resolution of issues associated with the Permit Center
- Working with the Departments establishes KPIs for permitting business processes and monitors, reports, communicates and publishes these metrics
- Manages the meeting agendas and follows up on action items
- Manages review and tracking of joint project proposals from submission to approval to close
- Monitors and reports status of joint project portfolio
- Reports and escalates risks and issues
- Ensures that all required resources are assigned and clearly tasked

5.3 Reporting

Decisions made in Executive Meetings will be memorialized in memos signed off on by departments in future Executive Committee meetings and then issued formally from the City Administrator. The Executive Committee meetings will follow a two phase timeline. The focus of Phase 1 will be on opening the Permit Center and operational improvements on the first day. Upon opening the Permit Center, Phase 2 will begin with a focus on future operational and process improvements to the Permit Center. The Charter will be revisited upon the completion of phase 1.

5.4 Meetings

The Executive Committee meets once a month in the short term and when needed (but at least quarterly) in the longer term. The Executive Committee meetings will be working meetings where decisions are made in the meetings related to the governance of the Permit Center. It is imperative that participating departments attend Executive Committee meetings and give input from their departmental viewpoints to ensure everyone’s input is reflected in decisions guiding the Permit Center work. The Permit Center team will create an agenda to address items for discussion during Executive meetings. Executive Committee members may add any agenda items to meetings by emailing the Permit Center Director at least 3 weeks in advance of a future meeting.
## ED 23-01 view

**Permitting Goal:** 2 - Construction Permitting Per...

### Programs: Close stale/expired permits

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Workstream notes</th>
<th>DBI o...</th>
<th>DBI!...</th>
<th>DS/Da...</th>
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<th>PM lead</th>
<th>Depends on</th>
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<tr>
<td>1</td>
<td>DBI: Close expired on-hold permits (1st round)</td>
<td>In Progr...</td>
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<td></td>
<td></td>
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<td>12/1/2...</td>
<td>6/30/2...</td>
<td>Neville</td>
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<td>2</td>
<td>DBI: Close expired issued permits (no inspection)</td>
<td>In Progr...</td>
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<td></td>
<td>12/1/2...</td>
<td>6/30/2...</td>
<td>Neville</td>
<td>2/10/23: Joe Duffy working to...</td>
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<tr>
<td>3</td>
<td>Fire: Notify applicants of expired Fire-only per...</td>
<td>In Progr...</td>
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<td>3/6/20...</td>
<td>8/31/2...</td>
<td>Mandy</td>
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<td>4</td>
<td>Planning: Close stale/expired permits</td>
<td>In Progr...</td>
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<td>3/6/20...</td>
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<td>5</td>
<td>DBI: Automate permit expiration/closure (on...</td>
<td>Not Star...</td>
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<td>2/10/23: PTS dev work to run r...</td>
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<tr>
<td>6</td>
<td>DBI or PCT: Close expired Fire-only permits</td>
<td>Not Star...</td>
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<td>6/26/2...</td>
<td>8/31/2...</td>
<td>Neville</td>
<td>4/20/23: Neville to discuss opti...</td>
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### Programs: Construction permitting data governan

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<th>PM lead</th>
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<tr>
<td>7</td>
<td>DS: Develop data definitions</td>
<td>Blocked</td>
<td>✔</td>
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<td></td>
<td></td>
<td>11/1/2...</td>
<td></td>
<td>DataSF</td>
<td>3/2/23: DataSF has paused wo...</td>
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<tr>
<td>8</td>
<td>DataSF: Create Project: Permits link</td>
<td>Blocked</td>
<td>✔</td>
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<td></td>
<td></td>
<td>1/16/2...</td>
<td>6/16/2...</td>
<td>DataSF</td>
<td>3/2/23: DataSF has paused wo...</td>
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### Programs: DBI: Pre-plan check

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<tr>
<td>9</td>
<td>DBI: Implement OTC pre-plan check</td>
<td>Not Star...</td>
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<td>Neville</td>
<td>10/2/22: Patrick O made this ...</td>
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<tr>
<td>10</td>
<td>DBI: Display Tier on public PTS view</td>
<td>Not Star...</td>
<td></td>
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<td></td>
<td>Neville</td>
<td>2/10/23: Once this is done, DBI...</td>
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<tr>
<td>11</td>
<td>DBI pre-plan check: Capture and report stat...</td>
<td>Blocked</td>
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<td></td>
<td>7/5/20...</td>
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<td>Neville</td>
<td>DBI: PTS enhancements (R...</td>
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<tr>
<td>12</td>
<td>DBI: Capture time to First Review</td>
<td>Blocked</td>
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<td>7/5/20...</td>
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<td>Neville</td>
<td>DBI: PTS enhancements (R...</td>
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### Programs: DBI: Reform addressing process
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<th>PM lead</th>
<th>Depends on</th>
<th>Workstream notes</th>
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<tr>
<td>13</td>
<td>D31: Redesign the addressing process</td>
<td>In Progr...</td>
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<td></td>
<td></td>
<td>9/12/2...</td>
<td>3/31/2...</td>
<td>Patrick</td>
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</table>

**Programs:** Internal building permit dashboards (V

| 14 | Public Works: Update DataSF pipeline to sup...         | In Progr...|          |        |          |           | 12/5/2...  | 5/1/2023 | City Perf |            | 4/20/23: Updates delayed, pen... |
| 15 | CON: Update and roll out WIP v2.0                     | In Progr...|          |        |          |           | 1/12/2...  | 5/26/2... | City Perf |            | 3/16/23: Iterative rollout begin... |
| 16 | Establish baseline performance measures               | Not Star...|          |        |          |           |            |          | CON: Update and roll out |                      |
| 17 | Fire: Update construction permit data pipeline        | Not Star...|          |        |          |           |            |          |          |            | Can they pull the PTS data the... |
| 18 | DataSF: Update public BSM datastore to sup...          | Not Star...|          |        |          |           | 5/1/20...  | 5/31/2... | City Perf |            |                      |

**Programs:** PTS reports and integrations

| 19 | Fire-PTS integration                                  | Not Star...|          |        |          |           |            |          |          |            | Can they pull the PTS data the... |
| 20 | PUC invoice and refund reporting                      | Not Star...|          |        |          |           |            |          |          |            | 4/21/23: Mandy submitted M... |

**Programs:** Public building permit queue data

| 21 | Planning: Update Housing Development P...             | In Progr...|          |        |          |           | 12/1/2...  | 3/31/2... | Planni... |            | Reza is optimizing performanc... |
| 22 | Discovery: Public construction queue dashb...          | Not Star...|          |        |          |           |            |          |          |            | DBI: PTS enhancements (R... |

**Programs:** Standardize PTS data entry

| 23 | DBI: PTS enhancements (Review Results colu...         | In Progr...|          |        |          |           | 3/9/20...  | 5/26/2... | Neville |            | 4/20/23: Per Cathy, UAT to beg... |
| 24 | Track compliance with PTS 101 standards                | Not Star...|          |        |          |           |            |          |          | Mandy     | DBI: PTS enhancements (R... |
| 25 | PTS 201: Operationalize the Review Results c...        | Not Star...|          |        |          |           |            |          |          | Mandy     | DBI: PTS enhancements (R... |

**Permitting Goal:** 3 - E2E Digital Construction Per...
<table>
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<th>#</th>
<th>Name</th>
<th>Workstream</th>
<th>DBI o...</th>
<th>DB1...</th>
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<th>City Perf</th>
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<th>PM lead</th>
<th>Depends on</th>
<th>Workstream notes</th>
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<tbody>
<tr>
<td>26</td>
<td>DB1: Rationalize plan review assignment (in-...)</td>
<td>In Progr...</td>
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<td></td>
<td></td>
<td>7/25/2...</td>
<td>3/31/2...</td>
<td>Neville</td>
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<tr>
<td>27</td>
<td>DB1: Prioritize rechecks (in-house)</td>
<td>In Progr...</td>
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<td>7/25/2...</td>
<td>3/31/2...</td>
<td>Neville</td>
<td></td>
<td>Does this include interactive re...</td>
</tr>
<tr>
<td>28</td>
<td>Planning: Centralize intake of revisions</td>
<td>In Progr...</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td>2/1/20...</td>
<td>9/1/2023</td>
<td>Planning...</td>
<td></td>
<td>Tentative timeline</td>
</tr>
<tr>
<td>29</td>
<td>Standardize “soft intake” (Fire, DPH, Planning)</td>
<td>Not Star...</td>
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<td>10/14/22: Per Nhi</td>
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<tr>
<td>30</td>
<td>DB1: Standardize workflow and sequence for ...</td>
<td>Not Star...</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td>4/1/20...</td>
<td>11/30/...</td>
<td>Neville</td>
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<tr>
<td>31</td>
<td>DB1: Centralize OTC rechecks</td>
<td>Not Star...</td>
<td>✔️</td>
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<td></td>
<td>4/1/20...</td>
<td>9/30/2...</td>
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**Programs:** Digital Fire permits

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<th>End date</th>
<th>PM lead</th>
<th>Depends on</th>
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<tr>
<td>32</td>
<td>Fire: Digital water flow form</td>
<td>In Progr...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1/25/2...</td>
<td>6/23/2...</td>
<td>Darcy</td>
<td></td>
<td>Replace Screendoo...</td>
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<tr>
<td>33</td>
<td>Fire: Digital form to OnBase microservice for ...</td>
<td>In Progr...</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td>4/24/2...</td>
<td>6/23/2...</td>
<td>Darcy</td>
<td></td>
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<tr>
<td>34</td>
<td>Fire: OnBase workflow to support digital Wat...</td>
<td>In Progr...</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td>4/24/2...</td>
<td>7/28/2...</td>
<td>Mandy</td>
<td></td>
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<tr>
<td>35</td>
<td>Fire: Pre-apps form</td>
<td>Not Star...</td>
<td>✔️</td>
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<td>36</td>
<td>Fire: WDO forms</td>
<td>Not Star...</td>
<td>✔️</td>
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<tr>
<td>37</td>
<td>Fire: Sprinkler removal and gurney letters</td>
<td>Not Star...</td>
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<tr>
<td>38</td>
<td>Fire: Temporary and event permit forms</td>
<td>Not Star...</td>
<td>✔️</td>
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<td>Fire: OnBase work to support digital form 's...</td>
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<tr>
<td>40</td>
<td>Fire: Update web content</td>
<td>Not Star...</td>
<td>✔️</td>
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<td>5/1/20...</td>
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**Programs:** Implement: Digital building forms

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<tr>
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<td></td>
<td></td>
<td>1/2/20...</td>
<td>3/31/2...</td>
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**Permitting Goal:** 4 - Transform Site Permitting

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