

XII. BENCHMARKING

In consultation with the City Manager's office, six cities were selected to benchmark a number of parameters for San Jose. The cities were Milpitas, Phoenix, Portland, Sacramento, Santa Clara and San Diego. The cities were sent the questionnaire shown in Appendix I and were contacted on several occasions to encourage a response. Five of the six cities responded by the date of the draft report.

Benchmarking can be an extremely effective tool for helping organizations improve and we always encourage clients to visit other cities. True benchmarking requires a considerable amount of time and resources that could not be accommodated in this current study. Our experience with benchmarking using mail and telephone is mixed. It tends to have the following problems:

- ✍ It is difficult to get cities to respond. Everyone is busy and the city may not keep the kind of data requested.
- ✍ There is no independent verification of the data received. Even when we are doing a detailed study for a city, it is not unusual that data furnished to us is inaccurate.
- ✍ In a multi-function study such as San Jose's, benchmark data cuts across numerous departments or divisions, further complicating data collection.

In order to attempt to compensate for the above issues we tried to simplify the benchmark parameters to make response as easy as possible. We should also point out that this study itself is, in effect, based on benchmark information. Zucker Systems has worked with some 150 cities and counties on their permitting systems and has used this storehouse of data in our analysis and recommendations.

A. ORGANIZATION OF FUNCTIONS

Advanced Planning

Some communities separate out the advance planning functions from the current planning functions. We prefer the combining of these functions as practiced in San Jose. Benchmark results are shown in the table below.

Table 56
Organization of Advanced Planning

Advanced Planning as Separate Department	Advanced Planning and Current Planning in Same Department
Portland	Milpitas
San Diego	Phoenix
	San Jose
	Santa Clara

Building and Safety

Some communities have Building and Safety as a stand-alone department. We prefer integration with Planning, as is the case in San Jose because of the need for close coordination of design, land use compliance and coordination needed between zoning and building codes. Benchmark results are shown in the table below.

Table 57
Organization of Building and Safety

Building and Safety as Separate Department	Building and Safety in Same Department as Current Planning
Milpitas	Portland
Phoenix	San Diego
	San Jose
	Santa Clara

Economic Development

Some communities have Economic Development as a stand-alone department, others integrate with Planning. We have recommended both patterns but for large cities like San Jose, we normally find that a separate function is preferable. Benchmark results are shown in the table below.

Table 58
Organization of Economic Development

Economic Development as Separate Function	Economic Development as Part of Other Functions
Milpitas (part of RDA)	Santa Clara*
Phoenix	San Diego**
Portland	
San Jose	

*Shared between City Manager and Planning

**Part of Community and Economic Development

Engineering

Many communities have Engineering as a stand-alone department or as part of a Public Works department. Some merge the private development engineering as part of a permit department. Benchmark results are shown in the table below.

Table 59
Engineering Organization

Engineering as a Stand-Alone Function or as Part of Public Works	Engineering as Part of a Permitting Function
Milpitas	San Diego
Phoenix	
Portland	
San Jose	
Santa Clara	

Fire Prevention

Fire Prevention functions are generally located within the Fire Department, similar to San Jose. Benchmark results are shown in the table below.

Table 60
Fire Prevention Organization

Fire Prevention as Part of Fire Department	Integrated with Building and Safety
Milpitas	San Diego
Phoenix	
Portland (located in permit center)	
San Jose	
Santa Clara	

Housing

Housing functions are sometimes located along with Planning. In larger cities like San Jose, they are often separate departments. Benchmark results are shown in the table below.

**Table 61
Housing Organization**

Stand-Alone Department	Integrated With Planning
Phoenix	Milpitas
Portland	Santa Clara
San Diego	
San Jose	

Redevelopment

Redevelopment functions are sometimes located with Planning but are often stand-alone functions in larger cities like San Jose. Benchmark results are shown in the table below.

**Table 62
Redevelopment Organization**

Stand-Alone Function	Integrated With Planning
Milpitas (part of Economic Development)	Santa Clara**
Phoenix*	San Diego***
Portland	
San Diego (CCDC)****	
San Jose	

*Part of Neighborhood Services and Economic Development Departments.

**Integrated with Planning.

***Portions are Integrated with Community and Economic Development.

****For Downtown area only.

Transportation

Transportation functions vary considerably among organizations. They are sometimes part of Public Works, at other times a department of Transportation and sometimes integrated with Planning. Benchmark results are shown in the table below.

Table 63
Transportation Organization*

Separate Department
Milpitas
Phoenix
Portland (work out of permit center)
San Jose
Santa Clara

*The review of private development projects is conducted in the Development Services Department.

B. CITY COMPARISONS

Table 64
One-Stop Permit Centers

Features	Milpitas	Phoenix	Portland	San Diego	Santa Clara	San Jose
ONE STOP PERMIT CENTER						
One Stop	Yes	Yes, except for zoning	Yes	Yes	Yes	Partial
Center Manager	Yes	Yes	Yes	Yes	Yes	Yes
Manager reports to	Building Official	Asst Dir of Dev Serv	Dir Off of Plan Dev Review	City Manager	Building Official	Building Official
Counter wait time target	No	Yes	Yes	Yes	Yes	Yes
Time in minutes	N/A	30 min	30 min	10 min appt/30 min w/out appt	20 min	30 min
Lowest counter time	1 min	15 min	0 min	0 min	0 min	10 min
Average counter time	2 min	40 min	15-20 min	30 min	10 min	39 min
Highest counter time	15 min	60 min	120 min	90 min	75 min	120 min
FUNCTIONS IN CENTER						
Advanced Planning	Yes	No	No	No	Yes	No
Building and Safety	Yes	Yes	Yes	Yes	Yes	Yes
Code Enforcement	Yes	?	No	No	Yes	No
Current Planning	Yes	Yes	Yes	Yes	Yes	No
Economic Development	?	?	No	No	No	No
Engineering	Yes	Yes	Yes	Yes	Yes	No
Fire Prevention		Yes	Yes	Yes	Yes	No
Housing	Yes		No	No	No	No
Redevelopment			No	No	No	No
Transportation		Yes	Yes	No	Yes	No

One-Stop Permit Centers continued

Features	Milpitas	Phoenix	Portland	San Diego	Santa Clara	San Jose
POLICY ON COST RECOVERY (policy/normal achieved)						
Advanced Planning	No/none	No/none	0%/40%	No	0%/0%	0%/?
Current Planning	no?40%	100%/100%*	65%/63%	100%/80%	100%/80%	100%/83%
Building and Safety	100%/100%	100%/100%	100%/100%	100%/100%	100%/100%	100%/85%
Engineering	100%/90%	100%/100%	100%/?	100%/80%	100%/80%	100%/100%
Fire Prevention	No/23%	No/?	100%/?	100%/100%	0%/35%	100%/90%
PUBLIC BUILDINGS REVIEW						
Must Meet	Yes	Yes	Yes	Yes	Yes	Yes
PLANNING CODES						
Who conducts plan check	Building & Engineering	Dev. Services	Off. Of Plan. Dev. Rev.	Dev. Services	Bldg. Inspection	Public Works
Who conducts inspection	Building	Dev. Services	Off. Of Plan. Dev. Rev.	Dev. Services	Bldg Inspect & Public Works	Public Works
REDEVELOPMENT						
Who serves as redevelopment board	City Council	City Council	Appointed by Mayor	City council plus others	City Council	City Council
Who is redevelopment staff	City Department	City Department	Independent	Independent some /City Dept others	City Department	Independent
Who handles planning permits for redevelopment	Planning Staff	Redevelopment Staff	Off. Of Plan. Dev. Rev.	Dev. Services Dept.	Planning Staff	Red. some & Planning some
Who handles building permits	Building	Building	Off. Of Plan. Dev. Rev.	Dev. Services Dept.	Building	Building
Lead Agency for CEQA	Planning	N/A	N/A	Dev. Services Dept.	Planning	Planning
STAFFING						
Advanced Planning	10	78.9	64+ Cons.	77	4.5	37.5
Current Planning	10	78.9	60	63	8	42
Building and Safety	20	360	82	181.5	21/5	165.8
Code Enforcement	5	360	3	?	2.5	100
Fire Prevention	12	360	22	17	11.5	31
Engineering	13	360	8	43	8	67
Economic Development	1	?	24	29	Shared	49
Redevelopment	With Planning	?	33.5	73	Shared	136
Transportation	3	?	?	507	13	535
Housing	1	?	?	?	2	82
WORKLOAD						
00/01 Bldg Valuation	390,300,000	3,000,000,000	823,342,000	2,146,478,000	392,402,969	1,692,100,000
#Discretionary	174	30,000	1,097	463	102	3,153
PLANNING REVIEWS						
# Discretionary planning reviews per staff member	17.4	380	18.3	7.4	12.75	75
Building valuation per staff member in 000's	\$19,515	\$8,333	\$10,081	\$11,826	\$15,092	\$10,206
TIMELINES						
Next day bldg. Inspections	99%	98%	93% comm. 97% res.	93%	100%	85%
Next day fire inspections	100%	?	50%	25%	25%	85%
Planning comments in 30 days	100%	100% for site plans	100%	85%	100%	50%
Engineering comments in 30 days	100%	100%	95%	85%	100%	55% of goals

C. CONSULTANT OBSERVATIONS

Organization of Functions

San Jose and the benchmark cities are generally organized in a similar fashion. Exceptions being:

- ✍ Portland and San Diego separate out Advanced Planning. This is not an organization pattern that we normally recommend nor do we think it is appropriate for San Jose.
- ✍ Milpitas and Phoenix have Building and Safety in a separate department. Again, we do not normally recommend this structure nor do we think it is appropriate for San Jose.
- ✍ Part of Economic Development in Santa Clara is combined with Building and Planning. While we see no problem with this in Santa Clara (they were a Zucker System client) we see no advantage or need for this structure in San Jose.
- ✍ With the exception of San Diego, Engineering is in a Public Works department. We have indicated that the San Diego model is an option for San Jose but have not recommended it at this time.
- ✍ With the exception of San Diego, Fire Prevention's plan checking and construction inspection is located in the Fire Department. Although we would have no objection to a merged function, San Jose's Fire Department has made some major improvements over the past few years and the current structure can be beneficial in continuing that effort.
- ✍ Housing in Milpitas and Santa Clara is part of Planning. While this organization pattern often works in small communities, we generally do not favor it in communities the size of San Jose.

Additional discussion of organization alternatives are included in Chapter IV, Section F. It should be noted that there is not always a direct relationship between organizational responsibilities and the quality of services offered. We have seen a variety of approaches used successfully. Often, of major importance is the amount and quality of staff, the organizational culture and staff attitudes and the larger community goals and political environment.

One Stop Permit Centers

All the benchmark cities have advanced beyond San Jose in relation to having one stop permit centers. This will be corrected in San Jose as part of the new City Hall and the implementation of a variety of recommendations included in this report.

Counter Wait Times

San Jose counter wait times tend to be longer than benchmark cities. Elsewhere in this report, we are suggesting the wait times be shortened by assigning more back-up staff to the functions.

Cost Recovery

San Jose's cost recovery policy is similar to that found in benchmark cities.

Public Building Review

San Jose's having this review conducted by Public Works is unique amongst the benchmark cities. Elsewhere in this report we have recommended a few changes that would impact this function.

Planning Permits for Redevelopment

The Redevelopment Agency handles its own planning permits in Phoenix. Permits are split between the Agency and Planning in San Diego, similar to San Jose. The other benchmark cities process the permits within the planning function.

Staffing and Workload

We are reluctant to draw conclusions from the workload and staffing data.

As can be seen in the table, the number of discretionary planning reviews per planner is somewhat similar in Milpitas, Portland, San Diego and Santa Clara. However, these numbers are so low that we find them hard to believe. San Jose's number of 75 per planner is a more likely number. The Phoenix number seems high and we doubt its accuracy.

As shown in the table the building valuation per building staff varies from a low of \$8,333 in Phoenix to a high of \$19,515 in Milpitas. San Jose at \$10,206 appears to follow the norm.

1. *Recommendation:* The City Manager, END CSA and relevant Department heads should review this study and agree on an implementation plan, which should include:..... 18
2. *Recommendation:* The managers of the permitting functions should review the survey responses and discuss them with staff to brainstorm possible responses to customer concerns..... 33
3. *Recommendation:* Managers in all functions should examine the employee questionnaire responses and develop specific programs to improve communication with employees. 37
4. *Recommendation:* Managers in the permit functions should review the responses to Questions 29 to 40 and use these as a focus for staff discussions. Particular attention to this topic should take place in Building, Fire and Planning. Managers are encouraged to read *First, Break All The Rules*, to assist them in this effort..... 42
5. *Recommendation:* The City should undertake a new development and permitting fee study aimed at full cost recovery that fully implements State guidelines. 44
6. *Recommendation:* The City should continue its practice to segment and account for fees from development and permitting activities. Such accounts should set forth specific authorizations and strategies for managers to maintain performance levels while maintaining full cost recovery. 45
7. *Recommendation:* The fee accounts should include reserves to cover year-end carry over projects and to build a reserve for downturns in permit activity. 45
8. *Recommendation:* The permitting functions should prepare a consolidated monthly report on permitting activity and staffing levels for discussion by the Economic and Neighborhood Development CSA. This should be used as an early warning system of either additional downturn in activity or an upturn requiring additional resources. 45
9. *Recommendation:* Fees should be reviewed annually to keep pace with cost recovery levels..... 45
10. *Recommendation:* Establish minimum plan submittal requirements and reject applications that do not fully comply with these requirements. 45
11. *Recommendation:* Co-locate Building, Fire, and Public Works Inspectors in the same facility to promote communications, team work, and cooperation. 46
12. *Recommendation:* Create an inspection coordinating team consisting of supervisors from each discipline. 46
13. *Recommendation:* Improve customer parking at City Hall to allow customers parking to complete their business without getting parking tickets. 46
14. *Recommendation:* Department heads and the CSA should review the training programs, use of check lists, information bulletins, and quality control programs in each function and determine their effectiveness in achieving uniformity in actions by all staff. 46

15. *Recommendation:* Create a customer service comment form to cover all development permitting processes and make available throughout all City Hall areas where processing occurs. Send form to all permit applicants after projects are completed for occupancy. 47
16. *Recommendation:* The Building and Fire Divisions should use the provisions of the State of California Historic Building Code and common sense to preserve historic buildings in the City of San Jose. 47
17. *Recommendation:* Establish and publish a monthly newsletter for the permitting functions. Include maintaining it on the City Home Page as well as making it available in the Permit Center. 47
18. *Recommendation:* The City’s IDTS effort should proceed to complete the original scope of services. 50
19. *Recommendation:* The City’s current funding for the IDTS system should be increased. 50
20. *Recommendation:* The City Manager should reinforce the intent to coordinate IDTS out of the City Manager’s office and give IDTS management authority to have adequate representation from all relevant functions to prioritize and address issues. 50
21. *Recommendation:* Managers and supervisors in the permitting functions need to continually reinforce with employees the importance of the IDTS efforts but also listen closely to any frustrations. Many of these can be resolved through future upgrades. 50
22. *Recommendation:* The City should adopt a Citywide GIS strategy that includes a detailed and unified database and base map with Internet and desk top access to all data layers. 51
23. *Recommendation:* All permitting functions with heavy call volume should consider installing a voice system that notifies customers how many callers are ahead of them, the time it may take for their call to be taken, and when a voice mail message would be returned if recorded by the customer. 51
24. *Recommendation:* The principles outlined above should be considered in the design of the new City Hall as related to the development and permitting functions. 53
25. *Recommendation:* Provide identified locations in the co-located Permit Center for issuance of permits and public information that are not included in the Building Permit approval process. Each function should assure that staff coverage is provided during all public counter hours of operation. 53
26. *Recommendation:* The Director of Planning, Building and Code Enforcement should be designated by the City Manager as the executive to assure cross department integration of the City’s development and permitting functions. 57
27. *Recommendation:* The history of past City improvement activities should be shared with City employees. 61
28. *Recommendation:* This current study should be shared with employees and customers of the City’s development and permitting processes. 61

28.	Additionally, reports and communication should take place as recommendations are implemented.	61
29.	<i>Recommendation:</i> An END CSA group of operational employees should be formed to work on inter-departmental operational issues. While the END CSA will primarily focus on broad strategy and some tactics, the new group will primarily focus on detailed operational issues. Key functions represented should include Building, Fire, Planning and Public Works. Other functions to be added when appropriate include Code Enforcement, Economic Development, Housing, Information Technology, Parks, Redevelopment and Transportation.	62
29.	<i>Recommendation:</i> The performance measures should be reviewed for possible modifications as outlined in this report.	63
30.	<i>Recommendation:</i> As soon as the City’s overall budget strategy is set as related to the General Fund, the freeze on budgeted positions within the development and permitting functions should be released.	64
31.	<i>Recommendation:</i> Performance standards within permitting and development service functions should be closely monitored. As the year progresses, further consultation with the industry re fees and services should take place.	65
32.	<i>Recommendation:</i> Have the Code Enforcement Division use the AMANDA Computer system to work on the same data base as the rest of the Planning, Building, and Code Enforcement Department.	65
33.	<i>Recommendation:</i> The City Council should appoint a current Building Codes Appeal Board consisting of members who have appropriate experience.	69
34.	<i>Recommendation:</i> Establish an administrative fee for appeals to be heard by the Building Codes Appeal Board.	79
35.	<i>Recommendation:</i> Conduct periodic meetings between the Chief Building Official and each working group along with their Manager or Chief to review operations and resolve issues.	79
36.	<i>Recommendation:</i> Create and implement an expedited plan review process.	79
37.	<i>Recommendation:</i> Consider the use of consultants where an expedited plan check process cannot be supplied by in-house staff.	80
38.	<i>Recommendation:</i> San Jose should change the Building Official job specifications to include CBO certification.	80
39.	<i>Recommendation:</i> When position vacancies in Electrical and Plumbing or elsewhere occur, replace two of them with a professional Electrical Engineer and a professional Mechanical Engineer.	81
40.	<i>Recommendation:</i> Establish regular meetings between selected representatives of Planning and Building working groups to identify issues and document agreed upon processes as well as improving communications and cooperation.	82
41.	<i>Recommendation:</i> A written matrix should be developed and agreed on which documents responsibilities for Planners and Building staff along with methods of communication and coordination.	83
42.		

43. *Recommendation:* The Director of Planning, Building, and Code Enforcement should facilitate the process of meet and confer between Building and Planning staff and assure that acceptable communication and coordination occurs. 84
44. *Recommendation:* Explore the option of moving the Fire Prevention staff into the City Hall Permit Center. 85
45. *Recommendation:* The Director of Planning, Building and Code Enforcement should appoint a Permit Center Manager to be responsible for ensuring that the Permit Center is operating efficiently, all Divisions and Departments are meeting their goals and responsibilities, and a high level of customer service is maintained..... 85
46. *Recommendation:* Staff assigned to the Permit Center should be supervised from each respective function for technical and professional content. 86
47. *Recommendation:* A Permit Center Manager or his designated representative should have administrative authority for permitting processes and approval of staff absences to assure continued provision of..... 86
47. service by each function. Input from the Permit Center Manager should be considered when preparing staff performance reviews. 86
48. *Recommendation:* If Haz-Mat operations are moved to the City Hall Permit Center, provide at least one Permit Center location for issuance of their permits..... 86
49. *Recommendation:* Have a Permit Center supervisor on duty at all times with responsibility of providing staffing that will assure that there are never more than five people waiting in either line waiting for service. 87
50. *Recommendation:* Review policy and determine where additional resources will come from to provide Receptionists duty when needed..... 87
51. *Recommendation:* If space reconfiguration occurs to accommodate Fire Department presence in the Permit Center, consider adding space for Receptionists for added help and a desk area to open plans..... 88
52. *Recommendation:* Prepare and offer a process handout that will be available for customers when they enter the Permit Center, by mail, and on the internet..... 88
53. *Recommendation:* Designate staff to review and upgrade all information bulletins, identify those needed and take responsibility to relocate the holding racks to a central location in the Permit Center..... 88
54. *Recommendation:* Develop and implement checklists for commercial/industrial and residential plans to be used for all plan reviews. 89
55. *Recommendation:* Create a process that will guarantee that consultants conduct plan check in a scenario similar to the process used by City staff Plan Check Engineers. 90
56. *Recommendation:* Retain a team of qualified consultants that will perform qualified plan check review within established time frames when called upon..... 90

57.	<i>Recommendation:</i> Implement the collection of data that will report time activity on each plan check worked on by each individual staff. Add the entry section to permit screens on the computer system.	90
58.	<i>Recommendation:</i> The City should adopt the Plan Check goals set forth in Table 19.....	91
59.	<i>Recommendation:</i> Division Management should review demands other than plan check assigned to Plan Check Engineers and consider assigning them to other resources to allow quality time for them to complete quality plan checks.....	91
60.	<i>Recommendation:</i> Create a form for Plan Check Engineers to provide comments on each job to identify special details and helpful comments to assure that all elements of the approved plans are implemented.	92
61.	<i>Recommendation:</i> When Plan Check Staff are asked to help with overflow Express Plan Check, arrange adequate private space to conduct this work with applicants.....	92
62.	<i>Recommendation:</i> Create and maintain a centralized research library for use by all staff in their work.....	92
63.	<i>Recommendation:</i> When a position in the Building Division becomes vacant, consider reinstating the Chief Electrical Inspector Position.....	94
64.	<i>Recommendation:</i> Create an annual tool or equipment permit and inspection process, which clearly states the kind of devices that qualify for this program and maintains documentation.....	95
65.	<i>Recommendation:</i> Designate one Supervising Inspector to be Training Coordinator.....	95
66.	<i>Recommendation:</i> Install, implement and use a Field Inspector’s hand-held computer system.	97
67.	<i>Recommendation:</i> Install and implement an Interactive Voice Mail Response System (IVRS) to handle calls for inspections.	97
68.	<i>Recommendation:</i> Add additional data to the computer-generated Inspection Request Form.....	98
69.	<i>Recommendation:</i> Program the data collection system to collect and sort time spent on each type of construction from the Inspection Request Forms.	98
70.	<i>Recommendation:</i> Obtain digital levels for use by Inspectors.....	98
71.	<i>Recommendation:</i> Planning and Building should meet to decide the appropriate roles for each to play in condition conformance.	99
72.	<i>Recommendation:</i> Continue current positions staffing level with current workload.....	102
73.	<i>Recommendation:</i> Architectural Engineering Division Plan Check Engineers and Inspectors should participate in existing weekly training with Building Division staff.	105
74.	<i>Recommendation:</i> When the Architectural Engineering Division needs third party service for unusual buildings or conditions, they should use services of the Building Division rather than a private consultant.	105

75. *Recommendation:* The Principal Manager of Architectural Engineering and the Deputy Director / Building Official of the Building Division shall work together to establish a quality control program for service and spot checking, which will ensure that uniform code compliance is being met on public buildings and assures acceptable coordination. 105
76. *Recommendation:* Staff Reports and other documents presented to decision makers should be proof read to ensure information contained in the report is not contradictory or conflicting. 125
77. *Recommendation:* The Department should provide more opportunities for training and professional development for Planning Commissioners. 125
78. *Recommendation:* The annual retreat between Planning Commissioners and Planning staff should include revisiting the past year and planning for the coming year in terms of issues, concerns, procedures and possible improvements with feedback to and from all participants. 126
79. *Recommendation:* The Director or Deputy Director should brief the Planning Commission on the general reason for placing items on consent, as opposed to the public hearing agenda. 126
80. *Recommendation:* Early notice of pending EIR's should be routinely provided to decision-making bodies. 126
81. *Recommendation:* Planning Commission training for new members should include the provision of an outline or brief list of key points to consider when conducting application review and participating in the public hearing process. 126
82. *Recommendation:* Every Staff Report should include a map that clearly locates the project site, and the hearing packet may include a single map with all project locations identified, if practical. 126
83. *Recommendation:* The Department should ensure that funding is sufficient and that Historic Landmark Commissioners are encouraged to attend regular training and professional conferences and meetings. 130
84. *Recommendation:* The Planning Commission and Historic Landmarks Commission should meet on occasion to discuss common concerns and goals and projects of interest. 130
85. *Recommendation:* The City's goals and policies for Historic Preservation should be recognized as important by every department or agency involved in development. To accomplish this, we recommend that the Historic Landmarks Commission be placed on an END CSA meeting agenda to discuss Historic Preservation goals. 131
86. *Recommendation:* Planning Division staff should use a timekeeping system to record time spent on all planning projects. Timekeeping data should be printed onto a management report on a monthly basis and used to monitor staffing levels and work program needs. 134
87. *Recommendation:* The Planning Division managers and supervisors should use the Fee Study time estimates to budget staff time for all planning permit

- projects. Staff should be held accountable for using the time estimates as a standard by which to budget time spent on permits. 134
88. *Recommendation:* The two vacant Planner positions should be filled. The maternity leave position should be filled in the interim by staff reassignment or a temporary contract. The Code Enforcement liaison should be assigned to process permits. 135
89. *Recommendation:* The Principal Planners and Senior Planners need to spend less time on permit projects, increase the level of delegation, and increase the time spent on management functions, particularly training. 135
90. *Recommendation:* The Planning Division should prepare and adopt an annual planning work program. 136
91. *Recommendation:* An additional Principal Planner position needs to be created to oversee long range planning functions, particularly the General Plan, either through reassignment or upgrading. 137
92. *Recommendation:* Process improvements should be the responsibility of the entire Department. A process improvement work program should be developed and all relevant staff assigned to work on improvements in their departments. One person should be designated to coordinate all programmed process improvements, and this position should report to the Director or Administrative Officer. 137
93. *Recommendation:* The Planning Division staff needs to be assured that this study is endorsed and embraced by management and that their recommendations will be implemented to bring positive, effective change to their workplace. 139
94. *Recommendation:* The Planning Division managers should review comments made by the Planning staff and meet with staff to clarify and reinforce the Division's goals and Mission Statement. 141
95. *Recommendation:* Planning Division managers and supervisors should meet in a retreat setting to discuss management and leadership issues. An outside facilitator may be appropriate for this retreat. 142
96. *Recommendation:* The Planning Division managers and supervisors need to evaluate how decisions are being made to identify opportunities for delegating the majority of the day-to-day decisions downward. 142
97. *Recommendation:* Annual performance evaluations should be completed for every employee and should include an evaluation of both the employee and the supervisor. 143
98. *Recommendation:* If necessary, supervisors should seek assistance from the Human Resources Department in developing performance evaluations. 143
99. *Recommendation:* Supervisors need to check in with their employees at least quarterly to discuss goals and expectations. 143
100. *Recommendation:* The Planning Division managers need to develop a program for more frequent, timely and effective employee recognition. 143

101. *Recommendation:* Managers and supervisors need to ensure that all employees dress and conduct themselves in a professional manner and are accountable for their work..... 144
102. *Recommendation:* Basic, Planning-Only Preliminary Reviews should be conducted after new project review and should be conducted only in the presence of the Project Managers who have been assigned Preliminary Reviews and their direct Senior Planners and Principal Planners..... 145
103. *Recommendation:* Project plans and maps should be displayed in a way that allows everyone to visually participate in the project review process. 145
104. *Recommendation:* A short segment of the Tuesday Staff Meeting should include a brief review of Planning Commission and City Council agendas to educate staff about key decisions, issues and the direction of the hearing bodies. 146
105. *Recommendation:* Decisions need to be discussed with and include the input of relevant staff. 147
106. *Recommendation:* Both Planning Division Deputy Directors should meet on a regular basis with their Principal Planners. On occasion the Deputy Directors and Principal Planners and, when necessary, Senior Planners from both Divisions should meet jointly to discuss intra-divisional issues. 147
107. *Recommendation:* Mandatory group training sessions on selected topics should be held on a monthly basis and should be conducted before 9:00 a.m. or during a one-hour brown-bag lunch session. 149
108. *Recommendation:* The Planning Division training budget should be increased to 1% of payroll. 150
109. *Recommendation:* Managers and supervisors need to provide a minimum of two hours of training for each employee each week. At least three weeks of the month, one-on-one technical training should be provided in individual or small group settings. The fourth week, all or part of the two hours allotted for training can be spent in an all-staff group meeting or brown-bag luncheon. 153
110. *Recommendation:* The Planning Division should reinstate a staff rotation system at a level of frequency to be determined by the Director..... 154
111. *Recommendation:* The Planning Division should implement the “Ladder of Experience” training and documentation system, as defined below:..... 157
112. *Recommendation:* Customer response timelines should be set for all permit submittals. 161
113. *Recommendation:* Publish expected timelines for all processes..... 162
114. *Recommendation:* Separate applicant from City time in the AMANDA permit monitoring system. 162
115. *Recommendation:* The AMANDA system should be programmed to automatically track timelines and provide exception reports when timelines are not met. 162
116. *Recommendation:* The Planning Division needs to effectively streamline the day-to-day permit review and processing functions by establishing a clear

- scope of review for all levels and types of permits and developing policies, procedures, checklists, templates, and standard conditions for each permit type..... 163
117. *Recommendation:* The Department should create and implement a universal planning permit application form. 163
118. *Recommendation:* Application packets should be standardized and should include consistent types of documents and information, such as the following: 164
119. *Recommendation:* One type of information sheet and/or brochure should be created for each permit or process as a handout or information available on line, and all such documents should be consistent in content and in formatting. 164
120. *Recommendation:* Space for applicants to address the approval criteria should be provided on a document or checklist separate from the application form. 165
121. *Recommendation:* All of the Department’s planning permit applications and application packets should be available on line. 165
122. *Recommendation:* Confusing planning permit codes should be changed so that they are easier for customers and staff to identify and refer to..... 165
123. *Recommendation:* All Preliminary Review requests should be forwarded to Project Managers the same day they are accepted for processing. 166
124. *Recommendation:* Project Managers should immediately begin the review of both simple and complex Preliminary Review requests and bring complex reviews to the next Tuesday Staff Meeting for discussion. 166
125. *Recommendation:* General Plan Amendments should be required to go through the Preliminary Review Process. 167
126. *Recommendation:* When General Plan Amendments involve the conversion of industrial land for housing, Planning, Housing and Economic Development staff should be involved in the Preliminary Review Process..... 167
127. *Recommendation:* The Department might consider providing customers with a Property Profile Report as part of the Preliminary Review Process and as an independent service that could be ordered at the Public Information Counter or online. 167
128. *Recommendation:* Project Managers should be able to receive new project files before the Tuesday Staff Meeting when they have time to immediately begin their review, but should be held accountable for remembering to bring these new files to the meeting for discussion..... 168
129. *Recommendation:* The Planning Technicians should receive additional training on sending out referrals..... 169
130. *Recommendation:* Planning Technicians must flag every Special Handling file in the AMANDA system and Project Managers must send the Special Handling memo to all appropriate parties..... 169
131. *Recommendation:* When accepting applications on large or controversial projects, staff should provide applicants with a copy of Council’s Public

- Outreach Policy 6-30 and inform them that they are responsible for posting the site according to provision 5. of the Policy document..... 170
132. *Recommendation:* The Council Public Outreach Policy matrix should be updated to show that on-site noticing is required for large or controversial projects. 170
133. *Recommendation:* Neighborhood associations should be on the project referral lists and be notified of all new project applications filed in their 171
133. neighborhoods. Public hearing notices should also be sent to neighborhood associations, when applicable. 171
134. *Recommendation:* The effort to develop a comprehensive and up-to-date database of neighborhood associations should be a higher priority and should be coordinated with the SNI/Special Projects staff to incorporate their existing neighborhood data. 171
135. *Recommendation:* The Council Public Outreach Policy matrix should be updated to show that early community meetings are required for large or controversial projects. Such meetings should be held at the conceptual stage, before the project details have been decided and before an application is filed with the City. 171
136. *Recommendation:* The Preliminary Review Process should include a written evaluation by the Project Manager setting forth the level of public outreach appropriate and required for every project..... 172
137. *Recommendation:* The application submittal packet should include documentation verifying that the applicant has complied with any early public outreach requirements, such as community meetings and on-site posting. 172
138. *Recommendation:* All of the development divisions, including Planning, must have their comments ready so that application completeness can be determined at the Thursday Project Review Meeting. 172
139. *Recommendation:* The Planning Division managers should meet with Public Works to lay out a process for notifying Development Services and to establish a definite timeline for finalizing Public Works memos to meet or exceed the END-CSA Performance Measure 95% of the time. 172
140. *Recommendation:* Specific standards need to be developed to ensure that the Fire Department conducts a thorough review of planning projects and provides project-specific comments to the Project Managers. 173
141. *Recommendation:* All comments and conditions should be typed in standard MS Word format in exactly the words and style of language that needs to appear on the planning permit. The Planning Division needs to develop a template and standard language for other divisions to use in preparing comments and conditions..... 173
142. *Recommendation:* The Department should develop ways to improve staff's understanding of each of the different development functions and processes through cross training, job shadowing, and short training sessions. 174

143. *Recommendation:* Planners need to spend some time in the field with Code Enforcement and the Building Inspectors to better understand the outcome of planning policies and recommendations..... 174
144. *Recommendation:* 95% of all 30-Day Letters must be mailed within 30 days of the day a permit application is accepted for processing. 174
145. *Recommendation:* The 30-Day Letter template should be updated to reflect the current Project Review day and year..... 174
146. *Recommendation:* The 30-Day Letter should include the Project Manager’s direct telephone number and email address in the body and under the signature line. 175
147. *Recommendation:* The 30-Day Letter should clearly explain to applicants that delays in providing needed information will extend processing timelines accordingly, and may result in denial of the application. 175
148. *Recommendation:* A copy of the 30-Day Letter and any subsequent requests for a response should also be mailed to the property owner(s) if different from the applicant. 175
149. *Recommendation:* The Department needs to set a clear policy for how staff is to proceed when an applicant does not respond to a request for information or action by the deadline set forth in the 30-Day Letter..... 176
150. *Recommendation:* The Department needs to establish a clear process, document procedures and train staff before implementing the new Project Conformance/Condition Compliance review process. 176
151. *Recommendation:* The City should adopt a policy to officially render planning projects “inactive” after six months of dormancy, at which time staff should notify applicants that, unless files are reinstated or withdrawn, they will be processed for denial. 177
152. *Recommendation:* The process of terminating inactive project files should be a routine project management function carried out by all of the Planners and monitored by their supervisors. 177
153. *Recommendation:* The AMANDA system should be programmed to flag all project files that have been inactive for six months and automatically generate a standardized inactive file letter for customization by staff. 177
154. *Recommendation:* If an applicant does not respond or does not reactivate or withdraw an application within 30 days after an inactive file letter is sent, the application should be denied through an administrative process. 177
155. *Recommendation:* Management should designate staff and set a timeline to clear the backlog of inactive project files so that all inactive files are either reinstated or withdrawn by the applicant, or denied. 178
156. *Recommendation:* The Zoning Ordinance should be amended to reflect clear policies on dealing with withdrawn and inactive project files..... 178
157. *Recommendation:* Tree Removal Permits requesting the removal of blighted, obstructing or dangerous trees and not associated with development should be administratively processed by the City Arborist. 180

- 158. *Recommendation:* Reasonable Accommodation Requests should be administrative decisions by the Director. Appeals should be heard by the Planning Commission only, and should only be accepted when an appellant has valid grounds for the appeal specific to the review standards established by City Council in the Reasonable Accommodation Guidelines..... 181
- 159. *Recommendation:* Permits that routinely range from being simple to complex should be divided into two or three levels and reviewed and processed accordingly. Thresholds for determining the level of review, documentation, and decision for multiple level permit types should be determined by the Director and Plan Implementation Deputy Director, and approved by City Council. 181
- 160. *Recommendation:* Single-Family House Permits should only be required in specific neighborhoods or areas where design and preservation are important. 182
- 161. *Recommendation:* The City should develop and adopt specific design guidelines and review standards for those areas where Single-Family House Permits are required. 182
- 162. *Recommendation:* Single-Family House Permits should be approved administratively or at a Director’s Hearing..... 182
- 163. *Recommendation:* A consent agenda should be created for non-controversial items required to be reviewed at the Director’s Hearing level. 183
- 164. *Recommendation:* The update of the Annexation procedures and Resolutions needs to be completed and approved by the Department, and the Plan Implementation Deputy Director and Principal Planners should designate a Planner as the Department’s Annexation specialist, who will process all future Annexation requests according to the new procedures. 183
- 165. *Recommendation:* When a General Plan Amendment is filed concurrently with, or will be followed by a development permit, a member of the General Plan staff and the District Project Manager should act as a team to jointly oversee the Plan Amendment and development permit process. The team should work closely together on the process with the same Planner processing both permits and being the lead and a point-person for the developer, while the other is closely involved in an advisory capacity..... 184
- 166. *Recommendation:* The Zoning Ordinance must be amended as needed to reduce the number of Planned Development Zonings being processed to achieve desirable development projects. 185
- 167. *Recommendation:* Use of the City Council-initiated rezoning program to bring zoning into conformance with the General Plan should be resumed. 185
- 168. *Recommendation:* Wireless Communications Facilities in residential zoning districts should be reviewed at the Director’s Hearing level with an opportunity for appeal to the Planning Commission. 186
- 169. *Recommendation:* The Planning Division should strengthen its CEQA section and processes and consider if this function requires a Principle Planner expert..... 186

- 170. *Recommendation:* Planning and Redevelopment staff involved with environmental review needs expert, in-depth training in how to do detailed environmental analysis..... 187
- 171. *Recommendation:* Planning and Redevelopment staff should specifically be trained to understand their roles in achieving the goals of environmental review within the budget, timelines and scope of authority for each project. 187
- 172. *Recommendation:* City Council should proceed with adoption of amendments to the CEQA Guidelines to increase projects exempt from CEQA. 188
- 173. *Recommendation:* City Council should proceed with adoption of the ordinance to eliminate the Negative Declaration Protest process. 188
- 174. *Recommendation:* The District Senior Planners should be certified to review and sign off on Initial Studies and Negative Declarations and the Environmental Senior Planner should audit 5% of the documents for quality control. 189
- 175. *Recommendation:* The Department should create guidelines and formatting examples specific to the San Jose CEQA process for consultants to use in preparing environmental documents and technical reports. 189
- 176. *Recommendation:* Staff should begin to set forth a work program and timeline for completion of a comprehensive General Plan update. 190
- 177. *Recommendation:* Suggested amendments to the Zoning Ordinance should be considered, prioritized, and placed on a work program for completion..... 192
- 178. *Recommendation:* Amendments to the Subdivision Ordinance to reflect smart code street design standards and other contemporary standards appropriate for urban and infill development should be placed on a work program for completion. 192
- 179. *Recommendation:* The City Council and Planning Commission Policies need should be consolidated into a folder that can be at each Planner’s desk and/or on the intranet for all staff to access. 193
- 180. *Recommendation:* City Council and Planning Commission Policies should be placed on a regular cycle of review. 193
- 181. *Recommendation:* The Residential Design Guidelines update should proceed as a high priority and should reflect current trends in transit-oriented and high-density housing as well as the Regional Water Quality Control Board revised storm water permit regulations..... 194
- 182. *Recommendation:* Needed changes to the Historic Preservation Ordinance should be identified, prioritized, and placed on a work program for completion. 194
- 183. *Recommendation:* General Plan amendments to add Conservation Areas and Historic Preservation Goals should be considered and placed on a work program for completion. 194
- 184. *Recommendation:* Historic Preservation Design Guidelines should be produced for all Historic Districts. 194

185. *Recommendation:* The Public Information Counter should be open from 9:00 to 5:00 every day, including the lunch hour..... 195
186. *Recommendation:* There should be professionally made signs directing customers to the different areas of the Public Information Counter area... 195
187. *Recommendation:* The two receptionists need to provide coverage for each other at all times, including lunch and breaks. The clerical support staff should only be asked to provide reception coverage when one of the receptionists is on vacation or absent from work. 196
188. *Recommendation:* Training for the receptionists and all backups to the receptionists needs to be more focused and include training in how to answer phones, greet customers, handle money, locate materials, and perform other routine reception duties for customers. 196
189. *Recommendation:* Customers with appointments who are waiting to see a specific person should not have to wait more than five to ten minutes. If the person scheduled to meet with the customer has a conflict, another member of staff should be sent to assist the customer within five minutes of the appointed time. 197
190. *Recommendation:* If customers arriving without appointments need to see a specific person and that person or someone equally as qualified will not be available within 15 minutes, the customer should be asked to make an appointment to come back at another time. 198
191. *Recommendation:* 100% of the Public Information Counter customers should be assisted within the first 15 minutes of their arrival..... 198
192. *Recommendation:* Calls coming in on the Planning Department’s main telephone line should be answered by the third ring, even if it is only to tell the customer someone will be right with them. 199
193. *Recommendation:* Walk-in and call-in customers should be handled as two separate functions of the Public Information Counter and Planners should be rotated for assignments to cover either counter or telephone customers.... 200
194. *Recommendation:* Senior Planners trained to process permits should rotate to the counter for one, four-hour shift each month, with the long-term goal being to have a Senior Planner or very experienced Planner at the Public Information Counter at all times throughout the day. 201
195. *Recommendation:* When opportunity presents itself (through attrition, additions to staff, or staff interest), consideration should be given to permanently assigning one Senior Planner to the Public Information Counter. 201
196. *Recommendation:* The Planning Division should move toward having more permanent assignments at the Public Information Counter and should complete the transition before relocating to the new City Hall. To begin the transition, two Planner I/II’s should be appointed to the counter for 3-6 month assignments under a system that considers the key points noted above. 204

197.	<i>Recommendation:</i> Planners should not be conducting their own project work or meeting with their own applicants during the time they are assigned for counter duty.	204
198.	<i>Recommendation:</i> Planners should have access to Code Enforcement information to alert them of conformance issues or open code cases before permits are processed.	204
199.	<i>Recommendation:</i> Staff should type conditions into the AMANDA system, print out four copies for attachment to the permit and plan sets, and stamp the plans as original. If possible, AMANDA should be amended so the conditions are table driven.	205
200.	<i>Recommendation:</i> Counter Letters should be processed to completion within five working days.	205
201.	<i>Recommendation:</i> The MS Access database should be merged with form Counter Letters to automatically print applicant addresses on the letters and mailing labels.	206
202.	<i>Recommendation:</i> All general inquiry emails for the Public Information Counter should be responded to the same day they are received. Customers should be provided with either the answer to their question, or a courtesy notice that the email has been received and research should be completed and an answer provided within 24 hours.	206
203.	<i>Recommendation:</i> Management should set a time limit of two days to clear the backlog of emails and implement a same-day/24-hour response policy for all emails received from this day forward.	206
204.	<i>Recommendation:</i> Staff should begin tracking the number of general inquiry emails that come each day so that management can appropriately staff the function.	206
205.	<i>Recommendation:</i> An Interdepartmental Referral form should be completed and given to all customers who are sent by staff to another department.	207
206.	<i>Recommendation:</i> If time permits and sufficient coverage remains at the counter, staff should take a brief moment to walk customers to the next department if they have been sent from place-to-place.	207
207.	<i>Recommendation:</i> The Planning Division needs to implement counter-related recommendations to reduce workloads and streamline counter functions and then monitor the following performance standards to determine whether counter staffing levels are sufficient:	208
208.	<i>Recommendation:</i> Customer brochures and handouts should be moved to a location that is inviting and easy for customers to access.	209
209.	<i>Recommendation:</i> All brochures and handouts need to be updated to reflect accurate hours of business, policies, procedures and reference to the Planning Division Web site.	209
210.	<i>Recommendation:</i> The Planning Division should create a Web site brochure to inform customers of the services available on line.	209
211.	<i>Recommendation:</i> A computer for public use should be installed in the Public Information center.	210

- 212. *Recommendation:* Funding needs to be reallocated to purchase wireless remote phones and headsets for the Public Information Counter staff. 210
- 213. *Recommendation:* The Planning and Building Divisions need to execute a letter of understanding and matrix to clarify leadership, roles and responsibilities in regard to planning service at the Permit Center counter. 211
- 214. *Recommendation:* The Planner positions should be shifted to the Planning Division organization chart and referenced on the Building Division organization chart. 211
- 215. *Recommendation:* The Planners at the Permit Center should report to the Planning Division for content and to the Building Division for process and administrative procedures. 211
- 216. *Recommendation:* Planners hired, assigned or rotated to the Planning and Building Division counters should be suited for customer service and not see the counter as a dead end or punishment. 212
- 217. *Recommendation:* The Permit Center Planners should have the level of expertise and authority needed to respond to customer questions without leaving the Permit Center counter. 212
- 218. *Recommendation:* The Planning Division should assign a Senior Planner or experienced Planner I/II to the Permit Center. 212
- 219. *Recommendation:* Every task to be performed by the Planners in the Permit Center needs to be clarified and listed on the matrix that will accompany the Divisions' letter of understanding. 213
- 220. *Recommendation:* The Planning Division needs to rearrange its meeting times so that all Planners are in the Permit Center at 9:00 every morning. 213
- 221. *Recommendation:* Two Planners should be available to serve Permit Center customers during the lunch hour. 213
- 222. *Recommendation:* Planning and Building Division managers and staff need to recognize the importance of thinking and operating as a team and should work toward serving customers from a team approach. This could include, but not be limited to the following activities: 214
- 223. *Recommendation:* The Project Managers must prepare Council Memos as their first task on mornings following Planning Commission meetings and immediately forward the Memos to the clerical staff for processing. 215
- 224. *Recommendation:* Clerical supervisors need to be included in more meetings and their input sought whenever projects and decisions will affect their workloads and priorities. The weekly Planning Services and Plan Implementation Staff Meetings should provide for a few minutes of time where the clerical supervisors can address concerns, timelines and changes in processing affecting their staff. 216
- 225. *Recommendation:* The Planning Division needs to take inventory of the types of information that could be combined and stored in central databases and assign staff to compile and store the information on the intranet. 216

226. *Recommendation:* Every staff member and manager needs to be held accountable for consistently and accurately entering and updating data in the AMANDA system. 217
227. *Recommendation:* The Project Managers should assist in preparing files for imaging by avoiding the use of, or removing, staples, post-its and other excess items and properly purging, organizing and repairing documents.. 218
228. *Recommendation:* Direct supervision of the records management function should be officially transferred to the Principal Planner over Information Services. Once the records management system and staff is stabilized, supervisory responsibilities should be transferred to the Information Services Senior Planner. 219
229. *Recommendation:* Additional resources are needed to clear the backlog of filing and imaging in records management..... 219
230. *Recommendation:* Every employee needs to take responsibility for properly managing files and records. The Principle Planner and Senior Planner need to develop a monitoring system to enforce good file and records practice.220
231. *Recommendation:* The Planning Division needs to take inventory of materials appropriate for a library and find a suitable area in which to consolidate and properly maintain them for the staff. 220
232. *Recommendation:* The new City Hall should include space for a Planning Division library..... 220
233. *Recommendation:* The Administrative Officer should continue to work with General Services to resolve contractual issues and get more reliable and higher-volume copiers in the Planning Division..... 221
234. *Recommendation:* Supervisors need to emphasize that non-business or non-essential emails affect everyone’s workload and may need to train staff in proper email usage and etiquette and when it is more appropriate to use the telephone or have a personal discussion. 221
235. *Recommendation:* The Department should investigate the cost and effectiveness of purchasing and installing a system that converts voice mails to emails. 221
236. *Recommendation:* The Planning Division needs to provide proper workspaces, chairs, desks, keyboards, and other ergonomic equipment for all functions performing repetitive and routine tasks. 222
237. *Recommendation:* Headsets should be purchased for Project Managers and other members of staff who spend much of the day on the telephone. 222
238. *Recommendation:* All telephones should be equipped with basic features such as message indicator lights, transfer and hold buttons, and speed dial. 223
239. *Recommendation:* The Planning Division should record information about the Web site, commonly asked questions, and common processes for customers to listen to while waiting on hold. 223
240. *Recommendation:* The receptionists need to be instructed to completely stop screening calls and put all calls directly through to the requested person.. 223

- 241. *Recommendation:* All telephone calls should be answered immediately. If the staff member is temporarily unavailable to answer the phone, all voice mail messages should be returned before the end of the day. 224
- 242. *Recommendation:* Supervisors need to enforce telephone policies and hold staff accountable. 224
- 243. *Recommendation:* Project Managers and their supervisors should agree on regular “office hours” and two- to three-hour blocks of uninterrupted time when the staff can concentrate on project work. Other members of staff and management, as well as customers, should respect office hours and quiet time..... 225
- 244. *Recommendation:* The Planning Division should assign or hire one person as the designated planning web coordinator to ensure consistency in how information is presented and maintained on the Web site. 225
- 245. *Recommendation:* The Zoning Ordinance and General Plan should be searchable on the Web site. 225
- 246. *Recommendation:* All documents and publications available in hardcopy format for distribution should also be available on the Web site..... 225
- 247. *Recommendation:* Change the Hazardous Materials Disclosure form used during time of building permit application to list all chemicals or substances listed as hazardous in the Uniform Fire Code. Send all forms marked YES in any category, as well as those with added chemicals not listed, to the Haz Mat section of the Fire Department. 234
- 248. *Recommendation:* Assign an administrative position to assume responsibility for the CUPA program billings, collections, and records..... 235
- 249. *Recommendation:* Conduct meetings between non-uniformed staff and Fire Department management to clear the air of understanding of their reception and roles in the Department. 235
- 250. *Recommendation:* Create a separate Fire Inspection section for the purpose of conducting combined inspections for Architectural, Fire Sprinklers and Alarm installations. 236
- 251. *Recommendation:* We recommend that completion of cross training be accelerated to complete all cross training sooner than the current goal. 236
- 252. *Recommendation:* Maintain the Haz Mat unit as a separate operating function with Haz Mat specialists conducting plan review and inspections. 239
- 253. *Recommendation:* Complete training for Fire Protection Engineers and Inspectors to perform their functions in a combined manner for buildings as soon as possible. Implement a combined section, using the same staff for Architectural, Fire Sprinklers, and Alarm Systems on each job. 239
- 254. *Recommendation:* The Coaches and Team Leaders should meet to discuss how to best address the customer concerns re content of engineering reviews. 248
- 255. *Recommendation:* The Development Services Division should review the employee concerns outlined in the report and consider ways to increase employee empowerment. 249

- 256. *Recommendation:* Development Services should examine the pros and cons of organizing at least some of their functions on a geographic basis. 249
- 257. *Recommendation:* The Public Works Director and Deputy Director need to provide more focus to the permitting and development activities. One option would be for the DSD manager to report directly to the Public Works Director. 250
- 258. *Recommendation:* Planning and Public Works should meet to talk about project review deadlines and set specific deadlines for all final Public Works comments. 251
- 259. *Recommendation:* DSD staff to provide a list of mandatory submittal items for the acceptance of plans and documents for checking. DSD may reject incomplete submittals without a complete check and initiate a new agreement for plan check time. 253
- 260. *Recommendation:* Developer and DSD should agree to a total review time needed for each project. A standard list or special schedule should be developed for complex projects..... 253
- 261. *Recommendation:* DSD Manager and coaches shall assure that project assignments are directed to staff with the appropriate level of expertise and experience to complete the work. 253
- 262. *Recommendation:* To the extent possible, DSD plan review and permit timelines should be identical to or shorter than review times used in Planning and Building..... 253
- 263. *Recommendation:* Vacant positions in DSD should be filled and positions vacant for medical leave should be filled by temporary help or consultants. 254
- 264. *Recommendation:* DSD should develop its system for how to monitor first check completeness..... 254
- 265. *Recommendation:* The staff person in the PW Architectural Engineering Division responsible for plan check of landscape plans shall attend the weekly team meetings conducted by the DSD coaches and staff. 254
- 266. *Recommendation:* Require the Architectural Engineering Division to adhere to the agreed plan check turnaround time for each project. DSD shall maintain a priority checklist for each project to assure compliance. If this method fails, then reassign the landscape plan check function for private development in the Architectural Engineering Division to DSD..... 254
- 267. *Recommendation:* The Architectural Engineering Division and DSD should develop a system for payment of in-lieu fees to permit opportunities to incorporate overall developer landscape projects into more comprehensive city landscapes and street beautification projects. 255
- 268. *Recommendation:* DOT staff responsible for traffic signal plan geometric review and approval shall attend the weekly DSD team meeting to agree on project review priorities and timely delivery of the submitted plans. A priority checklist and schedule for each pending project will be addressed. 256

269.	<i>Recommendation:</i> DOT shall be obliged to maintain the committed review schedule that is set for each project.	256
270.	<i>Recommendation:</i> DOT shall commit to an expedited review and completed processing of the current backlog of geometric design review.....	256
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272.	<i>Recommendation:</i> If the above four recommendations do not produce measurable improvements during the first quarter of the 2002/03 fiscal year, then reassign DOT and DPW Construction Services Division staff to the DSD.....	256
273.	<i>Recommendation:</i> Expand phone systems to fully include all DSD team members.	257
274.	<i>Recommendation:</i> Expand DSD email mailbox space to accommodate large Cad file or photos.	257
275.	<i>Recommendation:</i> Provide cordless phones and/or headsets at the front counter for staff to use while simultaneously researching documents, files and other data.	257
276.	<i>Recommendation:</i> Expedite the inclusion of the Internet Web site to provide for the electronic issuance of minor encroachment permits and other permits that can be issued electronically.	257
277.	<i>Recommendation:</i> Provide inspection staff with appropriate field computers and training to properly document inspections for all DSD fieldwork. The system must be compatible with AMANDA and have the capability of downloading information via a docking and on-line connection.....	257
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279.	<i>Recommendation:</i> DSD phones should be programmed to allow easy transfer of calls to any City extension.	257
280.	<i>Recommendation:</i> Open DSD's counter at 9:00 a.m.....	258
281.	<i>Recommendation:</i> DSD should use one of the monthly industry meetings to discuss the appropriate attendance and a format for the meetings.	258
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286. *Recommendation:* Development Services should use a partnering approach similar to the one used with the Redevelopment Agency to resolve any inter- or intra-departmental issues. 260
287. *Recommendation:* Increase the time devoted exclusively to staff training from the present level to a minimum of three hours per person per week. The costs can be absorbed in the normal overhead in the fee program..... 263
288. *Recommendation:* Immediately initiate a training program that increases the skills of all new (less than two year) employees to a higher level. An academy for training is an essential element that needs to be implemented for all new incoming employees..... 263
289. *Recommendation:* Establish a weekly training program to be attended by every professional and technical staff member. Schedule training meetings at the same time each week. 263
290. *Recommendation:* Training presentations should be assigned to each staff engineer. The assigned training coordinator shall be held responsible for ongoing facilitation of the training program and training assignments..... 263
291. *Recommendation:* A quarterly schedule should be planned and distributed to staff. Presenters should prepare and submit outlines for their presentation. 263
292. *Recommendation:* The Development Services Division should use the “Ladder of Experience” approach to training engineers. 264
293. *Recommendation:* Redesign the DSD front counter to move it out farther into the unused waiting area. This will be a relatively low-cost improvement that will immediately benefit productivity. 264
294. *Recommendation:* Provide a minimum of four large layout plan review tables (48" x 72") to be used by the teams in the DSD. The office space necessary to accommodate these tables can be located in the space created by the relocated counter..... 264
295. *Recommendation:* Establish a regularly scheduled training program for all Engineers and Inspectors who are assigned to grading regulation responsibility. 265
296. *Recommendation:* Public Works and the Building Official should coordinate grading, review responsibilities and critique major projects after completion. 266
297. *Recommendation:* Public Works and the Building Official should meet and confer to determine who will monitor parking lots and flat work construction with regards to construction and drainage, and develop written guidelines. 266
298. *Recommendation:* The grading plan check should establish a cover sheet to be attached to plans which detail the approved soil bearing value, soil log, and soil mineral content, along with identification of critical areas of concern for building foundation and area drainage attention. 266
299. *Recommendation:* The Development Services Division should work with Building and Safety inspection staff to review federal storm water

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300.	<i>Recommendation:</i> Continue the current organizational placement for grading plan review and inspections due to budget constraints. When the economy improves and development increases, consider changing to a separate grading section.....	266
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302.	<i>Recommendation:</i> To improve the span of control for the Principal Construction Inspector, select two Senior Inspectors to serve as lead or assistant administration roles to facilitate supervision, control of work schedule and coordination of different locations of DSD inspection staff.	267
303.	<i>Recommendation:</i> Integrate inspection staff more completely into the DSD review process starting with the upgraded training program previously described.....	267
304.	<i>Recommendation:</i> Require engineering staff to work in the field with inspection to work first-hand with the practical implementation of the improvement plans during part of the training regimen.	268
305.	<i>Recommendation:</i> City staff should recognize that redevelopment projects are not “just another developer” and careful coordination with the Redevelopment Agency= is essential.	278
306.	<i>Recommendation:</i> The Lead Agency for CEQA should remain with Planning.	281
307.	<i>Recommendation:</i> Planning should be more responsive to Redevelopment by decreasing processing timelines for CEQA documents and increasing consultation and coordination.	281
308.	<i>Recommendation:</i> Public Works should reinforce the policy indicated in the Economic and Neighborhood Development CSA that projects should receive thorough, complete and consistent review in the first cycle of staff review.	281
309.	<i>Recommendation:</i> The Redevelopment Agency should prepare a memorandum of understanding concerning Historic Preservation issues and functions with Planning and the Historic Landmarks Commission.	282
310.	<i>Recommendation:</i> Building and Fire should review their approach to requirements for historic buildings.....	282
311.	<i>Recommendation:</i> Planning should work with Redevelopment to determine how Redevelopment wishes to have projects within redevelopment areas flagged for their review.....	283
312.	<i>Recommendation:</i> Planning and Redevelopment should arrive at a formal agreement on timing and responsibilities regarding streetscape and façade improvements.	283

313. *Recommendation:* The Executive Director of the Redevelopment Agency should address the issues highlighted above. She may wish to consider use of an outside organizational consultant to assist in this effort. 283
314. *Recommendation:* The Redevelopment Agency’s Web site should have permit information added. 284
315. *Recommendation:* Whatever final arrangements are ultimately decided upon, thought should be given to a comprehensive “team building” effort between Redevelopment and City staff using the services of an outside facilitator. 284
316. *Recommendation:* Planning, in concert with Economic Development and Housing, should develop a General Plan strategy and policies in regard to economic development and housing issues. Such a strategy should be reviewed by the END CSA and, as appropriate, brought before the City Council for approval. 287
317. *Recommendation:* Private sector developers, builders, planners, architects and engineers should be asked to conduct seminars for City staff involved in the permitting functions. 288
318. *Recommendation:* Economic Development should review how best to locate its staff dealing with permitting as part of the new City Hall. 288
319. *Recommendation:* DOT shall coordinate its review and provide conditions to the Planning Division concurrently with the Development Services Division. Planning will assure that conflicts that may arise are resolved in the discretionary review process. DOT and DSD should explore the use of “after project data collection” on certain developments..... 290
320. *Recommendation:* DOT, Planning, and Public Works DSD should develop a proposed traffic impact fee program that meets the following goals: 291