Executive Summary:
Development Review Assessment

MOUNTAIN VIEW, CALIFORNIA

November 24, 2021 - Revised

matrix consulting group

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Executive Summary

This executive summary provides an overview of the findings and key recommendations of the comprehensive development review process assessment report. This study was initiated in January 2021 and completed in the Fall of 2021.

1. Project Scope

This study was designed to ensure a comprehensive review of the City's development review operations. While the majority of these functions are the primary responsibility of the Community Development Department, it also included a review of those provided by other entities including Public Works, Fire, and other departments of the City. Key elements of the review included:

- Evaluating the City's Development review operations and staffing needs.
- Analyzing technology systems impacts on process efficiencies and staffing needs.
- Maintaining a high level of service to the community and type of development.
- Developing a roadmap to improve operational and staffing efficiencies.

The overarching goal was to provide a framework for implementing changes to the development review process that would provide high-quality, timely, understandable, and transparent services to the community.

2. Project Approach

In conducting this study, the following major activities were undertaken:

- Staff interviews and data collection,
- City Council member interviews,
- Stakeholder input through an online survey, three focus group meetings and individual interviews with prior applicants (detailed summary provided in Attachment A).
- Process documentation and evaluation of current processes,

- Best practices assessment (detailed summary provided in Attachment B),
- Technology evaluation, and
- Workload and staffing assessment.

Throughout the process, interim deliverables were developed and reviewed with staff for accuracy and input. This approach maintained a collaborative effort while ensuring a comprehensive and systematic evaluation was conducted and resulted in a set of recommendations that should significantly enhance service delivery and customer satisfaction.

3. Key Strengths of the Existing Development Review Process

While the principal focus of the report is on the changes necessary to implement improvement or changes in the process and staffing approaches utilized, during the study the study identified many key strengths within the existing organization. It is important to focus on these existing strengths. These serve as a strong foundation the City should use as a foundation for making future improvements. Some of the notable strengths include:

- Staff provide detailed comment letters to applicants.
- Planning staff provide robust staff reports to Environmental Planning Commission and City Council.
- A significant number of planning application decisions are made at the staff level (staff and Zoning Administrator).
- Building Inspections are primarily scheduled online, and inspectors are equipped with wireless enabled tablets.
- Applications are reviewed concurrently by all reviewers and divisions.
- Application review 'turnaround time' performance is reported every six months for planning entitlement applications.
- Contracted staff is utilized for specialty functions and during peak workload volumes.
- The City pivoted to digital application submittal during the Covid-19 pandemic, which has created an interim electronic application and review system.

- Online application materials are robust and provide detailed submittal requirements and checklists.

Over the last year, the City has implemented several changes in their service delivery approach that has improved services provided to applicants including:

- Transitioned to digital applications during pandemic,
- Updated and provided robust online application materials,
- Implemented virtual appointments, and
- Implemented scheduled in-person appointments.

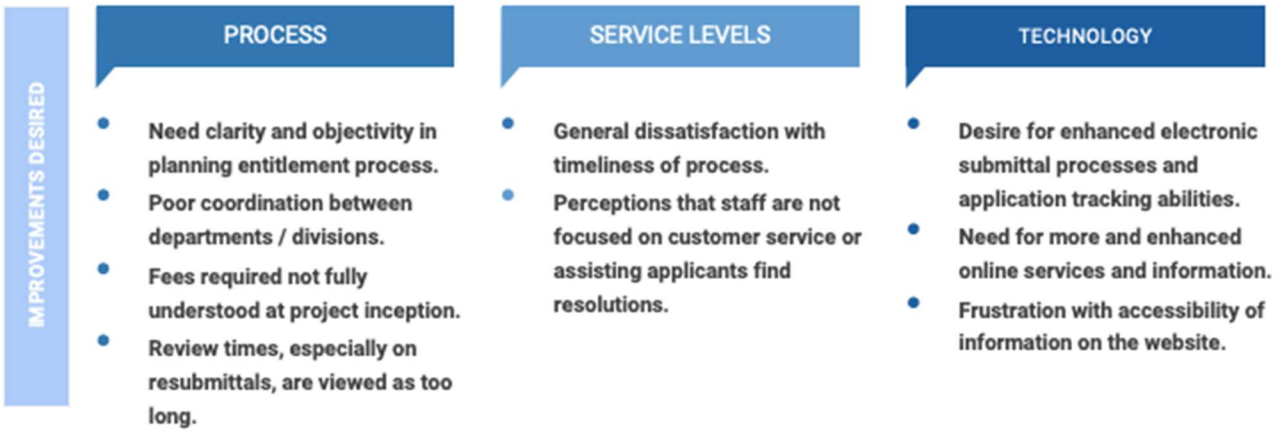
These improvements have had a significant impact on addressing several key concerns that had been expressed by stakeholders and have increased the quality and responsiveness of customer service. These changes also demonstrate the City's commitment to continuous improvement. A summary of the best practices assessment which identified current strengths and improvement opportunities is provided as Attachment B.

4. Key Themes Raised by Stakeholders

As noted early, outreach was conducted to prior customers to gain insight into their perspectives regarding the current services and service levels provided by the City of Mountain View related to the development review process. This outreach was conducted through multiple efforts including an online survey (290 responses), three focus groups, and twelve individual interviews with prior customers. A detailed summary of the stakeholder feedback is provided in Attachment A.

The key positive aspects of the existing development review process as identified by members participating in stakeholder outreach included the following items. It is important to note that these are in alignment with the strengths identified by the project team that were highlighted earlier in this summary.

A principal effort of the stakeholder outreach effort was to develop an understanding of the key areas of improvement or modification in the development review process they believed would improve the quality, timeliness, and accuracy of services. The key issues in process, service levels and technology are summarized in the following graphic.



This feedback, both the positives and areas for improvement, was extremely useful during this study. Areas identified as improvement areas desired by customers were included in the analysis conducted during the study and recommendations were developed to address confirmed issues.

5. Key Themes Identified from the Employee Survey.

In addition to the interviews conducted with employees, a survey was also conducted so that every staff member involved in the development review process had an opportunity provide input directly to the project team regarding challenges faced and ideas for improvement in processes, technology and staffing approaches. Input was received from 73 staff from the City of Mountain View. The key themes that emerged from the input included:

- Staff view technology implementation as the most pressing opportunity for improvement most specifically the replacement of the land management software solution.

- A more coordinated and streamlined approach to development review is a priority for many staff.

- A number of staff hope to see more clarity and predictability in the development review process.

- Staffing, workload, and timeliness were concerns for some of the responding staff.

- Several staff listed technology-adjacent initiatives as tools to improve process efficiency including centralized information accessibility and the need for more checklists and templates.

- The PCC process was a commonly identified area for modification to increase efficiency and staff utilization.

- Contract management and insurance reviews were commonly cited as roadblocks to efficient processing of permits and approvals.

- Staff identified customer-facing such as permit intake, payment, and approvals or permit issuance as needing to be streamlined.

- The processes for determining responsibilities and coordinating and executing plan review tasks was identified as needing streamlining.

These issues are very similar to the desired highlighted by the stakeholders and as identified by the project team after a best practices review.

6. Guiding Principles Utilized in Developing Recommendations.

In evaluating the processes and developing recommendations for improvement, the following guiding principles were utilized by the project team:

- **Clarity** of processes and regulations,

- **Consistency** in applying processes and regulations,

- **Predictability** for applicants in understanding what to submit, when reviews would be complete, and what the standards to meet are,
- **Customer Service** approach demonstrated both in interactions with applicants and in the information provided,
- **Effective technology f**or staff and applicants that support the efficient and effective processing of applications.

7. Major Recommendations.

While over fifty specific recommendations were developed to assist the City in transitioning to a more effective, responsive and transparent development review process, they all address four main themes: process changes, staffing modifications, and technology improvements. A full listing of each recommendation is provided as the last section of this executive summary. This listing shows the suggested implementation timeframe, the cost or staff time to implement and the level of implementation difficulty. This provides a strong foundation for developing an implementation plan that the City can use to track future progress in implementing improvements. The report suggests that periodic reports on implementation progress be prepared and shared with interested parties including the City Council and stakeholder.

The most critical recommendations are shown in the following graphics that group them into principal categories.

Process

- PCC Meeting modifications.
- Implement objective design guidelines.
- Improve application process.
- Standardize comment letters.
- Streamline staff report process.
- Develop a matrix outlining each required review.
- Adopt review times for all applications.
- Implement dashboard to present performance statistics.
- Establish traffic control plan criteria.
- Consolidate contracting process to reduce reviews and signatures.

Technology

- Implement new land management software.
- Implement online inspection scheduling for all inspection types.
- Integrate GIS into land management system.
- Create central webpage to serve as one stop shop for development process information.
- Create online dashboard to monitor progress of study implementation.
- Provide all field inspectors with tablets.

Staffing

- Prioritize filling of all vacancies in development review functions.
- Create Permit Navigator Position to oversee entire process.
- Increase contracted building inspectors by 1.5 positions
- Add administrative support in Engineering.
- Add 3 temporary positions to facilitate software implementation
- Provide contract technical engineering assistance for wastewater and stormwater permits.

An important point to note when reviewing these changes is that the vast majority of these have to do with internal process changes and modifications to customer-facing service delivery that will enhance the information provided to applicants. Other than the implementation of the recommended new land management software, these are relatively easy to implement if given priority.

There are some critical recommendations regarding staffing, especially as it relates to implementation of the Permit Navigator classification and the increases in staffing to align with workloads. However, these positions should be covered from fees and charges related to the development review processes and should not have an impact or be dependent on the general fund to implement.

The most critical recommendation for transformational change long-term is the implementation of a new land management software. The current system is inadequate to provide the services needed and expected by staff and customers and failure to replace this system will limit the City's ability to implement the future state desired. This will require both a significant investment in financial resources to acquire and successfully implement the new system. Given the importance of this effort, recommendations have been included for additional limited term positions to ensure there is adequate staff to successfully implement this effort.

8. Key Challenges to Effective Implementation of the Future State.

There are several challenges that the City may face in implementing recommendations and achieving the desired future state. The principal ones include:

- Maintaining full staffing for critical positions,
- Increasing workload over the last several years as development activities have increased,
- Adjusting processes and procedures to address new approaches during pandemic:
  - Electronic submittal,
  - Staff interactions entirely remote,
  - Most interactions with applicants virtual,
- Implementation will require a multi-year approach and additional financial resources. Since most funding will come from resources generated from application and permit fees, the impact on the general fund should be minimal.
- A fee study should be conducted to ensure that fees are appropriate to cover the costs of services being provided and that each applicant is paying their fair share.

9. Implementation Plan.

The project team in conjunction with staff developed a realistic implementation plan, dependent on allocated resources, that provides a roadmap for the City to implement these changes over a three-year period. The following graphic shows the major efforts by year.

2021 (short-term)	2022 (medium-term)	2023 (longer-term)
• PCC revision. • Review time standards. • Standardize comment letters. • Modify staff report process and contracting process. • Software selection process. • Updated website with one-stop approach implemented	• Initiate land management implementation. • Update design guidelines. • Modify informal application process. • Quarterly meetings with development community. • Updated review matrix. Hire staff associated with software implementation. • Implement Permit Navigator position(s) and administrative support position in Engineering. • Adopt reinspection fees for hazmat and • environmental inspections.	• Full implementation of land management software • Enable online inspection requests for all inspection types. • Expand GIS to increase information available for applicants • Dashboard with development review process

Detailed Recommendation Listing

The following table provides additional details for each recommendation including an assigned priority, timeframe for implementation, the estimated costs (in dollars or staff time) and a level of implementation difficulty. This information should assist the City in developing a manageable implementation plan that balances the need to address high priority items in a reasonable timeframe and to plan for the critical investments in resources.

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty (Easy → Difficult)
	Process and Procedures				
1	Revise the Project Coordinating Committee approach to discuss the application, comments, and draft conditions of approval (if appropriate) after initial review at the meeting.	High	Fall 2021	n/a	●○○○○
2	Develop and adopt new objective guidelines that specifically define the design elements that the City desires to regulate.	Medium	Fall 2022	150 – 200 hours	○○○●○
3	Develop a policy that limits DRC review meetings to a maximum of two per application.	Medium	Fall 2022	10 – 15 hours	○●○○○
4	Modify the requirements of the informal application process. A reduction in the requirements will provide the applicant with the appropriate feedback about the potential feasibility of a project.	Medium	Spring 2022	20 – 25 hours	○○●○○
5	Establish and publish formal application review times and track staff performance.	High	Fall 2021	5 hours	○○●○○
6	Adopt a policy that after 90 days of application inactivity, the application is automatically withdrawn.	Low	Concurrent with land management software implementation.	Included in software cost.	●○○○○
7	All review entities should establish and publish shorter review timelines for application resubmittals.	High	Fall 2021	n/a	○●○○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty (Easy → Difficult)
8	Utilize a centralized, online portal to request all development related inspections.	High	Concurrent with software implementation	Part of new software	○○●○○
9	Standardized review comment letters to include references to adopted codes, ordinances, and design standards and include checkboxes for staff and the applicant.	High	Fall 2021	10 hours	●○○○○
10	Streamline the staff report review process to include concurrent reviews on a shared document and reduce the timeframe for each phase. Providing a maximum of two weeks for review for all City Council staff reports.	High	Fall 2021	n/a	●○○○○
11	The online platform for all development related codes and ordinances should be up to date. At a minimum the online code should be updated quarterly. In between quarterly updates, any adopted ordinances and codes should be published online on the same webpage as the link to the online zoning ordinance.	High	2021, ongoing	5 hours quarterly	○●○○○
12	Community Development and Public Works should host a regularly scheduled meeting between the City's development reviewers and the local development community.	High	Fall 2022	4 hours per meeting for each staff member who attends	●○○○○
13	Convene all development reviewers to update the development application review matrix. This exercise should be completed annually.	High	Summer 2021	20 hours annually	●○○○○
14	Create a development review matrix that outlines the reviewers for each precise plan.	High	Spring 2022	3 hours per plan	○●○○○
15	Consolidate the contracting process to reduce the number of repetitive reviews and signatures.	Medium	Fall 2021	n/a	○○●○○
16	Establish internal timelines to complete contract review.	High	Fall 2021	n/a	○●○○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty Easy → Difficult ○○○○○
	Technology				
17	Purchase and implement a new permitting software system that is used by all development review staff.	High	Start Fall 2021	$800K - $1M	○○○○●
18	Hire three temporary/contract staff during the development and implementation of the new software system. This would include a Building Permit Technician, Associate/Assistant Planner, and Land Development Engineer for a two-year period or longer if need for successful program implementation.	High	FY 21/22	BPT: $128,000 Planner $184,000 - $240,000 Sr Eng.: $235,000	○○○●○
19	Hire the permitting software administrator prior to contracting with the new software vendor. This should be a permanent position assigned to Information Technology.	High	FY 21/22	$214K	○●○○○
20	Expand the capabilities of the City's GIS system and publish on the City's website where it is easily accessible to the public.	Medium	Begin Immediately, Complete by Spring 2023	Initially – 1,000 hours, 200 hours annually	○○○●○
21	Link the appropriate zoning ordinances to the online zoning map for quick access to the adopted code.	Medium	2022	10 hours	○○○●○
22	All field inspectors should be equipped with tablets that can access the City's land management system.	High	Upon new land management software implementation	$400 / tablet	○●○○○
23	Create a development review webpage that acts as a central hub and provides an overview of permitting requirements and links to departments for more information.	Medium	Fall 2021	150 – 200 hours	○●○○○
24	A staff member for each review department/division should serve as their respective department's content administrator. A Community Development staff member should be the overall administrator of the development review webpage.	Low	Fall 2021	10 hours quarterly	●○○○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty Easy → Difficult
25	The City should create a development webpage and interactive map to provide development project information to the public.	Medium	Upon new land management software implementation	4 hours monthly	○○○●○
26	Create a dashboard to present key historic and current performance indicators for the development review process. The dashboard should be updated monthly.	Medium	Upon new land management software implementation	Included in software cost.	○○○●○
27	Create a dashboard dedicated to the implementation status of the recommendations adopted from this study.	Medium	Upon new land management software implementation	Included in software cost.	●○○○○
	Community Development				
28	Develop and implement a formalized employee succession plan that focuses on mentoring and cross training for staff and identifying key staff members who may progress up the career ladder.	Medium	2022	40 – 50 hours	○○●○○
29	Maintain the current authorized staffing level in Planning.	n/a	n/a	n/a	●○○○○
30	Maintain the current allocation of one in-house plan checker and contracted plan checker services.	n/a	n/a	n/a	●○○○○
31	Increase the number of contracted building inspectors by 1.5 to meet the average workload levels. A total of 9.5 inspectors are needed overall at all classification levels.	High	FY 21/22	$258,000	○○●○○
32	Maintain the three Fire Protection Engineers assigned to Building Inspections.	n/a	n/a	n/a	●○○○○
33	Maintain the current allocation of four Permit Technicians assigned to Building Inspections.	n/a	n/a	n/a	●○○○○
34	Reclassify the Development Services Coordinator position to Deputy Building Official.	Medium	FY 21/22	$11,000	●○○○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty Easy → Difficult ○○○○○
35	Create the position of Permit Navigator to provide oversight of the entire development review and permitting processes. The Permit Navigator(s) would also serve as a liaison between the City and development community.	High	FY 21/22	$225 – $245K	○○●○○
36	A development fee study should be conducted at least every three to five years to ensure the fee schedule meets the City's cost recovery goal.	High	FY 21/22	$25,000 - $30,000	○●○○○
	Public Works Department				
37	Develop a checklist for traffic and utility related reviews to be used during the entitlement review process.	Medium	Spring 2022	40 – 50 hours	○●○○○
38	Revise and expand policies and procedures related to the development review process.	Medium	Fall 2022	150 – 200 hours	○○○●○
39	The Public Works Department should add an administrative support position to conduct insurance compliance reviews and other administrative tasks that are currently being performed by Engineering staff.	High	FY 21/22	$140,000 - $170,000	○○●○○
40	Provide training to all Public Works plan review personnel to apply a "nexus" lens in order to apply standards that are appropriate to the particular project under review.	High	Fall 2021	20 – 25 hours	○○●○○
41	The City should develop criteria under which standard traffic control requirements such as those included in California MUTCD may be applied.	High	Fall 2021	20 – 25 hours	○○●○○
42	The Public Works Department should develop checklists for inspections and record the time expended for each inspection.	High	Summer 2021	20 – 25 hours	○○●○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty Easy → Difficult
43	The Public Works Department should immediately fill its two existing vacancies in the Land Development Division. All authorized positions related to development review should be maintained.	High	ASAP	n/a	○○●○○
	Other Development Review Staff				
44	The City should adopt re-inspection fees for environmental and hazmat construction inspections to encourage compliance.	High	FY 21/22	5 hours	○●○○○
45	The City should fill the vacant Water Environmental Specialist and Hazardous Materials Specialist positions and maintain the current authorized staffing levels.	High	ASAP	n/a	○●○○○
46	The City should contract for technical engineering assistance in the review of wastewater and stormwater discharge permits.	Low	2022	$50,000 - $100,000	○○○●○
47	The City should provide access to the new land management software systems for contract staff as well as full-time employees.	High	Upon new land management software implementation	Part of new software	●○○○○
48	The City should retain the existing contracted approach to forestry and roadway plan review and inspections.	n/a	n/a	n/a	●○○○○
	Housing				
49	The Housing Division should re-evaluate its workload and staffing needs when the impact of recommended process and technology changes has become apparent.	Low	Upon new land management software implementation	50 – 75 hours	○○●○○
50	The CSFRA staff should remain organizationally located within the Housing and Neighborhood Services Division.	High	n/a	n/a	●○○○○

#	Recommendation	Priority	Implementation Timeframe	Cost or Staff Time Estimate	Level of Implementation Difficulty Easy → Difficult
51	The City should calculate the fully burdened cost of supporting the CSFRA program and charge this amount annually to the fund as an interfund transfer.	Medium	Spring 2022	$6,000 - $10,000	○○●○○
52	The responsibility for staffing the Council Neighborhood Committee should be moved from the Housing Division.	Medium	2022	n/a	○○○●○
53	The Housing Division should retain its existing organizational structure.	High	n/a	n/a	●○○○○

Attachment A – Stakeholder Analysis

A survey was conducted to gauge the opinions of City stakeholders (customers) on a variety of topics regarding the development review process and service levels provided. The survey was distributed electronically utilizing an online survey during February 2021 to 2,235 prior customers. A total of 290 responses were received for a response rate of 12.9%.

1. Key Findings

While the following sections discuss survey responses in more depth, the key takeaways from the results are summarized in the following bullet points.

- **Timeliness:** One of the most critical issues raised by stakeholders was the dissatisfaction with the amount of time it took for the City to process their applications. This was true across all permitting types (planning and zoning, building, and public works). Statements about timeliness generated strong negative responses, and the need for faster, more consistent timeframes was among the primary improvement opportunities listed by respondents.

- **Planning and Zoning:** Responses to statements about the planning and zoning process were among the most negative of any particular discipline addressed in the multiple-choice sections. Additionally, many open-ended responses focused on the City's approach to planning and zoning review as a cause of frustration specifically due to lack of clarity, subjective criteria, and multiple rounds of reviews.

- **Building Inspections:** Most respondents had positive feedback for the building inspection process as evidenced by the fact that every statement in the multiple-choice section on this topic received at least twice as many agreeing responses than disagreeing responses. The level of customer service and communication, the process of scheduling an inspection, and the approach of inspectors to ensuring compliance all received high marks.

- **Website and Electronic Processes:** Statements about the adequacy of the City's website received generally poor ratings indicating that many respondents felt it was insufficient for obtaining all the information needed to file a complete application. Most respondents also disagreed with a statement about the

efficiency of online submittal – while responses to this topic were marginally better during the Covid-19 pandemic, they still included a majority of disagreement.

- **Coordination:** A majority of respondents said that the City did not do a good job of coordinating input from different departments during the review process. This was further highlighted in the open-response section responses as well, where respondents indicated that the process was fragmented, disjointed, and confusing.

- **Covid-19:** Opinions about many aspects of the development review process seem to have taken a turn for the worse since the start of the pandemic, with the exception of planning and zoning functions, where sentiments were actually better among respondents.

2. Respondent Demographics

While the survey was anonymous, respondents were asked to identify their role in the development community. These identifiers help to understand who and how respondents interacted with the City.

The first question asked respondents in what capacity they had interacted with the City's development review process:

What is your role in interacting with the City of Mountain View regarding development or permitting activities?

Role	Count	%
Architect	53	18.3%
Builder	31	10.7%
Business Owner	52	17.9%
Contractor for specific trades (electrical, plumbing, mechanical)	45	15.5%
Engineer	19	6.6%
Environmental Consultant	0	0.0%
Homeowner	77	26.6%
Property developer	45	15.5%
Other (please specify)	33	11.4%
None of These	27	9.3%

The largest group of respondents were homeowners, followed by architects, business owners, contractors, and developers.

The next question asked participants which City development functions they typically interact with:

In what development functions do you primarily interact with the City?

Function	Count	%
Building Plan Check and Permits	221	76.2%
Building Inspections	112	38.6%
Fire Permitting	63	21.7%
Planning and Zoning	141	48.6%
Public Works / Land Development	111	38.3%

The most common interaction was with the building and plan check function followed by planning and zoning. Many respondents interacted with multiple City functions.

The third question asked respondents how frequently they interact with the City's development review process:

How frequently do you interact with the City's development, permitting, and inspection functions?

Frequency	Count	%
Several times per month	72	24.8%
Several times per year	93	32.1%
Once or twice per year	45	15.5%
Less than once or twice a year	80	27.6%
Grand Total	**290**	

The results show a mix of frequencies, with more than half of respondents interacting with the development review process at least several times per year. As would be expected, homeowners interacted less frequently with the City than other types of applicants. Of non-homeowners, 72% of them interacted with the process several times per month or several times per year.

The final question in this section asked respondents when their most recent interaction with the City occurred:

When was your most recent interaction with the City?

Most Recent Interaction	Count	%
Between March 2020 and today.	195	67.2%
Prior to March 2020	95	32.8%
Grand Total	**290**	

Approximately two-thirds of respondents have interacted with the City since the beginning of the Covid-19 pandemic.

3. Multiple-Choice Responses

This section of the survey asked participants to respond to a series of statements, indicating their level of agreement or disagreement with each. Statements addressing different portions of the development review process were shown only to respondents who indicated experience with that portion of the process. The available responses were "Strongly Agree" (SA), "Agree" (A), "Neutral" (N), "Disagree" (D), "Strongly Disagree" (SD), and "N/A" (not applicable). The tables in the following subsections show the percentages of responses received. The blue shading represents the level of response with a darker shade representing a higher response.

(1) Unclear and Overly Long Review Timelines Are Stakeholders' Biggest Frustration with the Planning and Zoning Review Process.

The first multiple-choice section was shown to respondents who indicated they had experience with the City's planning and zoning function. A total of 183 participants responded to this section.

#	Statement	SA	A	N	D	SD	N/A
1	I clearly understood what approvals / permits would be required for my project.	17%	30%	12%	23%	16%	2%
2	I clearly understood what information and documentation I needed to include in my application.	15%	26%	10%	32%	13%	2%
3	I clearly understood the timeline associated with the review process for my project.	9%	17%	13%	30%	28%	2%
4	I clearly understood who had the decision-making authority for my application.	11%	26%	18%	21%	20%	3%

#	Statement	SA	A	N	D	SD	N/A
5	I clearly understood what fees would be required for my project.	15%	28%	22%	12%	17%	5%
6	Staff was helpful in explaining what I needed to do and how to accomplish it.	12%	25%	21%	21%	19%	2%
7	The City's web site had the information I needed to prepare a complete application.	5%	23%	20%	21%	22%	8%
8	The initial review of my application was complete and comprehensive.	9%	26%	17%	17%	25%	5%
9	After receiving comments on my application, I clearly understood how to achieve compliance.	11%	23%	19%	22%	19%	6%
10	The comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	9%	22%	22%	21%	18%	8%
11	Staff provided good customer service throughout the process.	10%	29%	20%	23%	16%	2%
12	The time it took to process my application was appropriate.	6%	8%	16%	19%	45%	4%

All but two statements in this section received higher levels of disagreement than agreement with stronger negative feedback for Statements #3 and #12 regarding the timeliness of the review process. Different groups of respondents tended to have different opinions on these statements.

- Homeowners, the largest group and also the group with the least frequent interaction with the City, disagreed more than other respondents with Statements #1, #2, #3, #4, and #12, suggesting a lesser understanding of the process and timelines than other groups.

- Business owners disagreed more than other groups with Statements #1, #2, #3, #10, and #12, which focused on understanding the process, the timelines associated with review, and the comments' alignment with ensuring compliance.

- Property developers tended to disagree more than other groups in response to Statements #3, #10, and #12, which focused on the timeline of review and the relevance of comments to achieving compliance.

- Engineers and Builders were two groups which responded with higher levels of agreement than others in response to Statements #1 and #2, which focused on the understanding of the requirements associated with submitting a planning and zoning application.

- Respondents who had interacted with the process since March 2020 tended to agree more with Statements #2, #4, and #8 than respondents who had not.

(2) The Building Permitting Review Processes Has Many Strengths, but Review Timeliness and Lack of Website Clarity Are Key Drawbacks for Stakeholders.

The second multiple-choice section was completed by respondents who had prior experience with the City's building permitting function. A total of 197 participants responded to this section.

#	Statement	SA	A	N	D	SD	N/A
1	I clearly understood what approvals / permits would be required for my project.	19%	39%	12%	16%	14%	0%
2	I clearly understood what information and documentation I needed to include in my application.	17%	38%	13%	16%	15%	0%
3	I clearly understood the timeline associated with the review and approval process for my project.	11%	29%	14%	20%	24%	1%
4	I clearly understood the steps of the review process for my project.	11%	34%	19%	18%	15%	1%
5	I clearly understood what fees would be required for my project.	16%	38%	18%	11%	14%	3%
6	The City's web site had the information I needed to prepare a complete application.	7%	26%	26%	18%	19%	4%
7	The initial review of my building application was complete and comprehensive.	11%	37%	14%	15%	19%	3%
8	After receiving comments on my application, I clearly understood how to achieve compliance.	12%	33%	16%	14%	17%	7%
9	The comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	12%	29%	20%	11%	17%	10%
10	Staff was helpful in explaining what I needed to do and how to accomplish it.	13%	34%	16%	15%	18%	2%
11	Staff provided good customer service throughout the process.	13%	28%	22%	17%	18%	1%
12	The time it took to process my building permit application was appropriate.	9%	15%	12%	15%	44%	2%

The majority of statements about the building permitting process received more agreement than disagreement, with the only exceptions being Statements #3, #6, and #12 regarding timeliness and the information available on the website. Additionally,

specific groups of respondents tended to agree or disagree more than others with particular statements:

- Property developers and business owners expressed higher rates of disagreement than the average respondent to most statements (#1, #2, #3, #4, #7, #8, #10, and #11) in this section, topics which indicate that these two groups understand the requirements and review process less than other groups, find staff comments less useful, and find staff to be less helpful than others.

- Builders disagreed more than the average respondent with Statement #3, indicating that they understood the timeline associated with review and approval less clearly than others.

- Contractors as a group disagreed more than the average respondent with Statements #5 and #12, indicating frustration with the clarity of submittal fees and the length of the review timeline, respectively.

- Engineers responded with more agreement than average to half of the statements (#1, #2, #3, #4, #8, and #9) in the section, suggesting that they understand the process better than others and derive more benefit from staff comments than others. However, they disagreed with Statement #12 more than the average respondent, indicating that the length of review timeline was a concern for them.

- Architects agreed more than other groups with Statements #4, #8, and #10, topics covering their understanding of the process and staff's helpfulness in directing them to compliance.

- Respondents who had interacted with the process since March 2020 tended to disagree more with Statement #12 than those who had not. This demonstrates concerns that timeliness for the review process may have suffered as a result of the Covid-19 pandemic.

(3) The Building Inspection Process Is Well-Regarded by Stakeholders.

A second group of statements, regarding the building inspection process, was also presented to the same group of respondents as the prior section. A total of 188 participants responded to this section.

#	Statement	SA	A	N	D	SD	N/A
1	The City did a good job at communicating what inspections were required.	14%	30%	15%	6%	6%	28%
2	It was easy to request and schedule an inspection.	20%	30%	9%	5%	4%	31%
3	Inspectors dealt with me using a positive approach of "here's how to get your work approved".	22%	24%	11%	4%	6%	32%
4	If deficiencies were identified during an inspection, inspectors indicated the applicable code section.	16%	24%	10%	5%	4%	40%
5	The inspector showed up when expected.	22%	27%	9%	3%	3%	34%
6	Inspectors were fair and consistent in applying the codes and regulations to my project.	20%	24%	12%	4%	4%	35%
7	The process to obtain the certificate of occupancy for my permit was efficient.	10%	18%	10%	5%	8%	48%
8	Staff was helpful in explaining what I needed to do and how to accomplish it.	11%	25%	13%	4%	9%	35%
9	Staff provided good customer service throughout the process.	15%	26%	11%	7%	9%	32%

Every statement in this section received levels of agreement two times higher than the levels of disagreement, and no statement received more than 15% disagreement. Respondents hold high opinions of the building inspection process. This section did receive large numbers of “N/A” responses, particularly among architects and engineers.

(4) The Clarity of Public Works Fees and the Inspection Process Are Appreciated by Customers, but the Public Works Development Review Process Is Disliked for Its Lack of Timeliness and the Website Is Seen as Unhelpful.

The third multiple-choice section was completed by respondents who had prior experience with the City’s public works development review function. A total of 104 participants responded to this section.

#	Statement	SA	A	N	D	SD	N/A
1	I clearly understood what Public Works approvals / permits would be required for my project.	16%	27%	12%	29%	15%	0%

#	Statement	SA	A	N	D	SD	N/A
2	I clearly understood what information and documentation I needed to include in my application.	15%	26%	17%	23%	17%	0%
3	I clearly understood the timeline associated with the review and approval process for my project.	10%	20%	16%	25%	28%	0%
4	I clearly understood the steps of the review process for my project.	12%	27%	14%	22%	24%	0%
5	I clearly understood what fees would be required for my project.	11%	38%	11%	17%	19%	3%
6	The City's web site had the information I needed to prepare a complete application.	10%	22%	20%	23%	19%	4%
7	The initial review of my Public Works application was complete and comprehensive.	13%	26%	13%	21%	24%	1%
8	After receiving comments on my application, I clearly understood how to achieve compliance.	15%	26%	17%	15%	27%	1%
9	Comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	12%	29%	19%	15%	22%	2%
10	Staff was helpful in explaining what I needed to do and how to accomplish it.	15%	22%	21%	17%	20%	2%
11	Staff provided good customer service throughout the process.	16%	22%	20%	16%	21%	2%
12	I clearly understood what Public Works inspections were required for my project.	14%	26%	12%	10%	17%	18%
13	I clearly understood how to schedule a Public Works inspection.	14%	31%	8%	8%	12%	25%
14	The time it took to process my Public Works application was appropriate.	9%	14%	15%	20%	38%	3%

Opinions varied from topic to topic in this section. Statements #5, #12, and #13, regarding the fees charged and the inspection process, each received more agreement disagreement, while Statements #3, #6, and #14 regarding timeliness and the usefulness of the website, each received more disagreement than agreement. Different respondent groups also responded differently to certain statements:

- Property developers responded with higher levels of disagreement than the average participant to 12 of the 14 statements (#1, #2, #3, #4, #5, #7, #8, #10, #11, #12, #13, and #14) in this section, suggesting that they have less understanding than other groups of the review process, requirements, fees, and timelines, as well as a lower opinion of the review completeness, the helpfulness of staff, and the inspection process.

- Homeowners (of which only 12 participated in this section) responded with more disagreement than the average participant to Statements #1, #3, #4, and #7, indicating that they understood the submittal requirements, timelines, and process steps less than other respondents, and that they found the initial review of their application less complete than did other groups.

- Respondents who had interacted with the process since March 2020 disagreed more than the average with the majority of statements (#3, #4, #7, #8, #9, #10, #11, #12, #13, and #14) in the section, suggesting that timelines, process steps, the completeness and comprehensibility of comments issued, the helpfulness and customer service provided by staff, the inspection process, and especially the timeliness of review, have been perceived to be impacted since Covid-19.

(5) The Development Review Process in General Is Poorly Regarded, with Efficiency, Timeliness, and Predictability Key Complaints on the Part of Stakeholders.

The final group of multiple-choice statements addressed the development review process in general and was shown to all respondents. A total of 219 respondents participated in this section.

#	Statement	SA	A	N	D	SD	N/A
1	The process is predictable.	8%	18%	12%	25%	33%	3%
2	The City made clear the amount of time it would take to process my application.	6%	19%	17%	23%	29%	4%
3	The amount of time taken to review and approve my application was acceptable.	5%	14%	14%	19%	43%	5%
4	The City met its time commitments for processing my application.	6%	22%	18%	18%	29%	6%
5	City staff were accessible and responsive when I had questions regarding my application.	11%	25%	16%	25%	18%	4%
6	City staff provided good customer service throughout the process.	12%	26%	21%	22%	14%	4%
7	The City did a good job coordinating input from different departments.	8%	18%	22%	19%	21%	12%
8	The City's technical requirements were consistent with the codes and ordinances that the City enforces.	9%	29%	28%	12%	12%	10%
9	The City provided an efficient online submittal process.	6%	18%	14%	20%	28%	12%

All but two statements in this section received more responses in disagreement than agreement, suggesting that overall sentiment toward the development review process skews negative. In particular, the following groups' responses differed from the average of all those received:

- Property developers respond with more disagreement than average to Statements #1, #2, #3, #4, and #5, indicating that they believe the process to be less timely, less predictable, and hampered by the lack of staff availability more than did other groups.

- Builders disagreed more than other respondent groups with Statements #3 and #4, taking issue with the timeliness of the review process.

- Business owners disagreed more than other groups with Statements #3 and #8, suggesting that timeliness and the consistency of review requirements with the code were more pressing concerns for them than they were for other groups.

- Most statements (Statements #1 – #7) in this section received more disagreement from respondents whose most recent interaction has occurred since the Covid-19 pandemic, which suggests that most aspects of the process are viewed as having worsened since March. Statement #9, while still receiving a majority of disagreement from both groups, actually received slightly more agreement from respondents with the more recent interaction, indicating that perceptions of the online submittal process have improved.

4. Open-Ended Responses

The final section of the survey asked participants to respond to a series of questions in their own words. The responses are outlined in the following points, with reference to the number of responses received to each prompt and the number of responses aligning with the key themes identified.

(1) Strengths of the Development Review Process

The first open-ended question asked respondents to "describe the three greatest strengths of the development review process in Mountain View." A total of 112 participants responded, many of which offered up to three suggestions. While their opinions sometimes contradicted the results of the multiple-choice questions and do not

necessarily represent the more common sentiments of stakeholders, the following points explore these responses:

- **By far, the most common strength identified was the quality of staff involved in the development review process.** While earlier multiple-choice responses and later responses to the open-ended questions would contradict this sentiment, several respondents noted that City staff are available and responsive (29 responses), knowledgeable to provide help (29 responses), and exhibit a helpful or professional demeanor (26 responses), along with general accolades for staff (12 responses). Comments included, *"Good customer service with responsive staff by phone and email"*, as well as *"When a staff member answers a question, they are clear and decisive"*, and *"Great personalities by City Staff in general"*.

- **Several stakeholders appreciate the clarity of the City's requirements and expectations.** They commented that materials and explanations of the process were informative and easy to follow (19 responses), and some noted that the website and electronic processes have streamlined their ability to access information and make submittals (10 responses). Comments included, "*Great clarity on approvals required and timing*", along with "*Website contains helpful info and forms*", and "*Online process made it simple*".

- **A modest number of survey participants described the development review process as an efficient, well-oiled machine.** These respondents acknowledged the convenience of submittals, payments, and scheduling (7 responses), the well-organized and coordinated approach to review (6 responses), and the timeliness of inspections and plan review as a result (13 responses). Representative comments include, *"Scheduling inspection appointments was easy"*, and *"Planning coordinates with other departments well."*, along with *"The city met deadlines throughout the process"*.

- **Some survey respondents cite the quality of work performed as one of the process' strengths.** These participants noted the consistency of review criteria (6 responses), the thoroughness of the process (10 responses), and its effectiveness in producing projects at a high standard (6 responses). Comments of this nature included, *"Building department review is overall consistent and fair"*, as well as *"Detailed comments and clear direction"*, and *"I feel like if a project is approved, that project will be safe and code compliant"*.

These positive responses put employees front and center as the greatest strengths of the process, while also praising the clarity, execution, and output of development review in the City. As the following section explores, however, several of these positive sentiments were outweighed by less flattering comments by other respondents, a trend which aligns with the negative response to many of the multiple-choice segments earlier in the survey.

(2) Opportunities for Improvement of the Process

The second open-ended question asked respondents to "describe up to three opportunities for improvement in the development review process in Mountain View". A total of 134 participants responded to this section, many of which offered up to three suggestions. The following points discuss the responses received.

- **By far the most frequently listed opportunity for improvement was the timeliness of the process.** Later bullet points discuss responses which noted issues with inefficiency, inconsistent interpretations, or technical difficulty, but those related issues pale in comparison to the number of respondents (63 responses) who directly stated that various aspects of the development review process simply take too long, sometimes due to unnecessary rounds of re-submittal and review. Comments like, *"Three weeks between each submittal, no matter how small, is not fair to businesses."* and *"Review process is 60 days, not 30. Staff told me, 'Oh, no one gets approved on their first submission.'"* were typical.

- **Many respondents feel that the development review process is unclear and confusing to navigate.** These survey participants noted that elements of the process were inconsistent (22 responses), the requirements or expectations for development review were not clear (22 responses), the review process was not clear to them (10 responses), they could not identify a consistent point of contact (5 responses), or that the guidance materials available were not sufficiently explanatory (3 responses). Comments included statements like, *"I went through 3 different planners which made it seem like I was starting over each time"*, and *"Zoning requirements for grandfathered properties were vague and open to interpretation"*, as well as *"Need more clarity on fees and how they are calculated"*, and *"Plan submittal is a black hole"*.

- **Several respondents said that the development review process was poorly managed or poorly executed.** These comments, related to those in the prior bullet point, stated that the process suffers from general inefficiency (15 responses) and

disorganization (9 responses), a lack of coordination between departments or staff (9 responses), and a lack of thoroughness (6 responses), as well as an inability to differentiate between projects of different types and sizes (5 responses), or to expedite projects as needed (3 responses). Comments in this vein included, *"Improve intake process to avoid small errors later"*, and *"Evaluate boiler plate comments on a project-by-project basis"*, as well as *"Coordination between Planning and Public Works was atrocious"*, and *"Do not come up with new problems each review"*.

- **Numerous survey participants said that the approach of the City was overly burdensome or unhelpful.** These respondents said that staff needed to take a more constructive and helpful approach as opposed to rote or even punitive enforcement (18 responses). They described excessive focus on minutiae (9 responses), requests for unnecessary materials (7 responses), and subjectivity in the review process (5 responses). These comments included, *"Amount of information required was completely inappropriate to the project in hand."*, and *"Planning staff should impose fewer subjective requirements on architecture."*, as well as *"Need solutions-based customer service, rather than just saying 'no'"*.

- **Several survey participants observed poor customer service and "soft skills" on the part of the City.** Numerous respondents commented that they observed a lack of responsiveness or availability on the part of staff (16 responses), poor communication about relevant information (12 responses), staff in need of deeper knowledge or more training (12 responses), or poor staff attitudes (8 responses). Representative comments included, *"If staff leaves and are replaced, have replacement reach out to all current clients"*, and *"Staff attitude could be more customer service oriented"*, along with *"The communication was terrible, no responses to emails or anything else"*.

- **A number of respondents said that the website and electronic processes used in the development review process are insufficient.** These included complaints about the electronic submittal and application tracking software (17 responses), and about the navigability and amount of information available on the website (8 responses). Comments included, *"software used to log permits not easy to understand, seems old"*, and *"The website is a mess after Covid-19. It was incredibly frustrating finding what I needed"*.

These comments collectively align with the multiple-choice responses and outweigh much of the positive feedback received in the prior section. They paint a picture of a

development review process that is disjointed and poorly coordinated, technologically constrained, and characterized by burdensome requirements and subjectivity. Slow review times and customer frustration are the result of these issues.

4. Open-Ended Responses

In addition to the online survey for prior customers, the project team reached out to approximately 400 previous customers with invitations to participate in online stakeholder focus group meetings. A total of three focus group meetings were held on February 18, 22, and 23, 2021. In addition, the project team held several one-on-one meetings with stakeholders. As a result of this outreach, a total of 12 individuals provided feedback.

The feedback received during these sessions focused on many of the same issues identified in the online survey. All of the respondents indicated timeliness of the review process as a primary concern. A total of 10 individuals discussed the lack of consistent communication from the city as an issue. Also, 10 individuals discussed challenges with multiple rounds of reviews and frequently receiving comments/issues during resubmittal reviews that were not caught during the initial review. Five individuals referenced challenges during the building inspection process that focused on discrepancies on building the approved plan set but failing the inspection because the approved design was inaccurate according to the inspector.

While the number of participants in the focus groups was small, they reinforced many of the key challenges identified from the online survey.

Attachment B – Best Practices Diagnostic Assessment

This diagnostic assessment of the development review process covers the development review, permitting, and inspection processes of the City. This includes the Community Development Department (Planning, Building, and Housing), Public Works – Land Development Section, Fire Marshal and various City staff involved in the development review process. The purpose of this analysis was to obtain an understanding of how the development services within the City compare to best practices.

The following sections introduce the diagnostic assessment followed by a detailed diagnostic matrix of best practices for each functional area involved in the development review process highlighting key strengths and identifying opportunities for improvement.

1. Introduction

This document represents an important step for the project team to report on initial key findings and opportunities related to the development review process for the City. To determine the assessments of operational strengths and improvement opportunities, the project team utilized a set of best management practices to evaluate the various development review operations and processes.

The project team utilized a variety of data collection and analytical techniques to compare current operations against measures of effective operations in municipal organizations. This best management practices assessment provides measures of operation for major functions with the development review process. Collectively the best practices consist of:

- Statements of “best or prevailing practices” based on the study team’s experience in evaluating high-performing development review operations.
- Statements of “best practices” or “recommended practices” or performance targets derived from national professional service organizations (such as American Planning Association, International Code Council, etc.).
- Identification of whether the particular department or division met the performance targets.

The diagnostic assessment is one of several tools used to identify recommended improvements. Following this analysis, it can be used along with information from

stakeholder surveys and workshops, analysis of peer communities, feedback from the City, and data analysis from the project team to develop a final set of recommendations.

2. Key Strengths

Although the diagnostic assessment is designed to identify improvement opportunities, it is also an opportunity to identify existing strengths of current processes. Some of the key strengths of the City's development review process include:

- Staff provide detailed comment letters to applicants.
- Planning staff provide comprehensive staff reports to Environmental Planning Commission and City Council.
- A significant number of planning application decisions are made at the staff level (staff and Zoning Administrator).
- Building Inspections are primarily scheduled online, and inspectors are equipped with wireless enabled tablets.
- Applications are reviewed concurrently by all reviewers and divisions.
- Review turnaround performance is reported every six months for planning entitlement applications.
- Contracted staff is utilized for specialty functions and during peak workload volumes.
- The City pivoted to digital application submittal during the Covid-19 pandemic, which has created an interim electronic application and review system.
- Online application materials are comprehensive and provide detailed submittal requirements and checklists.

As the points above indicate, the City is already meeting a number of best practices.

3. Key Opportunities for Improvement

The comparison of the City's current approach to best management practices also identified some improvement opportunities. Some of the most notable issues are listed below:

- Each department has their own respective development review / permitting software solution, and each system does not interact with others. Staff outside of the respective division have limited or no access to other division's systems.
- Permitting software systems are redundant between divisions and Building's permitting system is the only one that partially serves as a development database.
- Staff conduct concurrent reviews of applications, but there is limited sharing of information between reviewers.
- Improved coordination between various review entities, especially those outside of Building, Planning, and Public Works, is recommended.
- There is a lack of consistency between review comment approaches and level of information provided (e.g., referencing code and design standards) between different review entities.
- There is a lack of availability and integration of GIS data for staff and the public.
- There is a wealth of development information on the City's website. Each department has a dedicated development webpage, but there are inconsistencies between the format and location of relevant information.

The above items do not completely align with industry best practices and indicate challenges that impact the efficiency and effectiveness of the processes and operations for development review, permitting, and inspections. These issues are addressed in the recommendations provided in this report.

4. Diagnostic Assessment Details

This section provides an initial overall assessment of current operations and processes and identifies initial opportunities for organizational and operational improvements. The assessment is presented in a checklist format. The checklist identifies whether current practices meet the best practice or adopted target. Descriptions for improvement opportunities are included in the last column of the table.

This analysis focuses on the development review operations of Building, Planning, and Public Works. These three divisions are the primary entities tasked with receiving and processing development review applications. Where City entities are heavily involved in the process, notes are provided.

This diagnostic assessment of best practices is broken down into the following section: Management and Administration; Customer Information and Interaction; Processes; and Technology Utilization.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Management and Administration			
The City has goals, objectives, and performance measures for permitting activities.	☐	☐	Community Development has informal, internal goals for processing development review applications. Goals are not published or officially adopted.
Managers routinely review performance (speed, efficiency) of the permitting process.	☐		Every 6 months, managers track staff's performance for entitlement applications compliance with a 30-day completeness review. Building tracks performance monthly.
Managers and staff have access to clear and accurate reports showing current workload, timelines, and other measures of performance.		☐	Community Development and Public Works produce bi-annual performance report for 30-day completeness reviews. No project planning, performance or workload tools are available to staff in economic development, forestry, housing, finance, or environmental safety
The department has backup plans in place in the event of absence or departure of key staff.	☐		Both formal and informal backup plans exist in Community Development and Public Works when staff are absent or leave the organization.
Customer satisfaction with each phase of the development process is monitored.		☐	The City should implement a customer satisfaction survey that is distributed upon completion of each application review or project close out (e.g., when certificate of occupancy is issued).

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Staff are provided with on-going in-service training opportunities for their professional development.	☐		Staff are provided professional development training opportunities to maintain their certifications and general professional development.
Internal staff training is provided on new features within the permitting software system.	☐	☐	Each functional area provides a different level of service for permitting software training. There are limited new features for Serena and MVPS due the age of the system.
Customer Information and Interaction			
The City provides easy-to-understand and attractive guides to the planning, building permit, and inspections process.	☐		Guides and information handouts are available online, although it requires several clicks to reach most of them due to their location within the website.
The City web site includes a virtual "one stop shop" that provides an overview of all permitting requirements and links to permitting requirements by department or division.	☐	☐	The website does not include an overview of the entire development review process. A consolidated development review webpage may serve as a starting point. Building has a one-stop location that links to their application by type, but it is not easy to find. Planning and Public Works do not have a consolidated development webpage. Parks has limited information regarding tree removal requirements on their webpage. Hazardous materials and environmental information is located on the Fire Department's webpage.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
All development staff are available at a single easy to access location.	☐		Community Development and Public Works staff are located at City Hall.
Fee schedule is published and regularly updated.	☐		Fee schedules were found online and were for the most recent FY. Development fee schedules are adopted annually. Development fees were updated in 2020. Staff indicated they may not fully capture all overhead expenses.
The City reaches out to the business and development community through periodic communications.		☐	The City does not consistently reach out to the development community. The Economic Development team serves as a liaison to the business community, special taxing districts, and chamber of commerce.
The City regularly obtains input from the business and development community on issues related to development review and permitting.		☐	Input processes are informal and often are complaint driven input from the public. Current approach is reactive input.
The City's policies/website clearly identify what applications can be approved administratively versus approval by the Environmental Planning Commission or City Council.	☐	☐	Application types are broadly defined on the website by approval authority. The city's adopted code clearly outlines the approval authority. No formal matrix exist that clearly identifies each of the review entities.
The City provides clear and comprehensive checklists identifying all items required to be submitted for each application type.	☐		Application forms by department include checklist / requirements for their specific applications / permits.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Application forms are available on-line and can be filled out electronically.	☐		Building, Planning, and Public Works have application and insurance requirements listed online. Parks requirements are included in the issuing department's application.
The City's long-term plans and land development code are available on-line.	☐		There is a centralized webpage under Planning with links to relevant plans and codes.
The City's adopted ordinance, regulations, and design standards are available and up-to-date online.	☐		Links are available that outline applicable state and federally adopted codes. Building also includes a link to local code amendments.
The City has a dedicated webpage that identifies major on-going development projects.	☐	☐	A webpage exists for current planning projects However, it is not updated regularly (e.g., weekly). Public Works has a webpage dedicated to their major CIP projects. An enhancement would link the projects to an interactive map or have a searchable map by address for public use.
Informational brochures for small development projects, particularly ones that are relevant to homeowners are in multiple languages.		☐	Produce information brochures and checklist in prevalent languages that are most relevant to home and business owners.
Guides exist for affordable housing and below market rate requirements.	☐		Guidelines exist for below market rate and affordable housing developments.
Housing program brochures are provided in multiple languages.	☐		Brochures are provided in English, Chinese, and Spanish.
Processes			

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Permit technicians are certified by the International Code Council (ICC).	☐		Building Permit Technicians are ICC certified.
Permit technicians review applications for completeness at time of submittal.	☐		All development review counter staff review applications to ensure they meet the minimum checklist items. Per state law, planning applications have a 30-day completeness requirement, which focuses on reviewing the project and identifying issues and missing elements.
Plans are routed only to departments for whom the project is relevant.	☐		Generally, plans are only routed to required reviewers. Resubmittals are routed only to reviewers with outstanding comments unless the applicant makes major changes to the design or submittal.
Staff uses a case management approach for larger projects.	☐		For Planning and Public Works applications, the assigned staff serves as the application lead. Building utilizes permit techs to serve as the application manager.
Applications provide sufficient evidence / documentation for staff (or the relevant approval authority) to successfully review the submittal and make a decision.	☐		Application checklists are robust, and staff check for application completeness before acceptance and processing.
Preapplication meetings are held for major projects.	☐	☐	This is an option but is not mandatory. The preapplication process for entitlements is called an “informal application”, but the submittal requirements are specifically outlined and extensive.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Review timelines are posted on the City's website.		☐	Informal timelines are shared internally, but not publicly. Timelines should be adopted and posted on the City's website. Timelines may also be incorporated into individual applications, but not summarized on the division webpages.
Expedited building plan review services are provided.	☐		Expedited building plan check is provided.
Resubmittal review turnaround times are quicker than new applications.	☐	☐	Building has shorter turnaround times for each round of resubmittals. Planning and Public Works do not have a formal policy but will route resubmittals only to those with outstanding comments unless a major change in the application has occurred.
Adopted review timelines are met consistently.		☐	All departments are not meeting planning review deadlines. Building, Planning, and Public Works receives a report every 6 months regarding their compliance with planning and building review deadlines.
A formal internal Development Review Committee is responsible for ensuring that plans address all City requirements.	☐	☐	The Project Coordinating Committee (PCC) started as a collaboration of all reviewers to discuss key findings and issues. However, PCC has morphed into a mechanism to distribute planning applications to all reviewers, with limited application / project discussion.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
All review comments are incorporated into a single comment letter and distributed to applicant by project manager.	☐	☐	A consolidated comment letter is provided to the applicant. However, review staff have limited accessibility to view other's comments, especially those outside their division. This is due to lack of permitting software accessibility and the use of software as application database.
All review staff have the ability to view the consolidated comment letter.		☐	Review staff have limited accessibility to see other's comments, especially those outside their division. This is due to lack of permitting software accessibility and the use of software as application database.
Review comment letters are consistent in their approach, format, and information provided.	☐	☐	Planning and Building comment letters are consistent in their approach between letters. However, each reviewer's approach is slightly different, and the level of information fluctuates.
Project review / comment letters provide reference to checklist and / or code reference.	☐	☐	Some reviewers provide references with comments, while others do not. Also, several references were noted with the word "should" versus "shall". The former indicates subjectivity which may not be defined in adopted code / ordinances.
Plans are reviewed concurrently to avoid delays.	☐		Plans are reviewed concurrently.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
For re-submitted plans, reviewers focus on ensuring that comments have been addressed and not identify issues that should have been brought up during initial review.	☐	☐	Staff indicated that they focus on reviewing the comments. Stakeholders indicated they often receive additional or new comments after several rounds of reviews that should have been captured during the initial review.
Approval authorities for planning and zoning permits are clearly stated and simple permits are approved administratively.	☐		Minor planning application decisions are made by the Zoning Administrator.
Applicants can track their permit application on-line.	☐	☐	Mountain View Permitting System (Building) has the ability to track permits online. Other systems do not allow online permit status tracking
Staff reports to the Environmental Planning Commission, and City Council are thorough and include staff/EPC recommendation.	☐		Reports are comprehensive and follow a standardized format.
Simple permits (e.g., basic electrical, mechanical, and plumbing permits and minor building alterations) can be issued over the counter or online with no review, subject to inspection.	☐		Prior to Covid-19, simple permits were issued over the counter now they are issued electronically.
Customers are given an approximate time to expect their inspector.	☐	☐	Building inspections are conducted the next day, with a call 30 minutes prior to inspector arrival. Inspections are requested either in the morning or afternoon. Fire, Environmental, Parks, Planning schedule exact times for inspection appointments.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Applicants can request inspections up to 5 pm the day before; next day inspections are available for 100% of requests.	☐	☐	Next day building inspections are available. The cut off time is 3 pm. Fire inspections are scheduled for a specific date and time, up to 5 days in advance. Planning and Public Work may provide inspections next day if staff are available.
An online inspection request system is utilized to receive inspections with linkage to the permit information system.	☐	☐	Building inspections may be requested online. Fire, Environmental, Parks, and Planning inspections are scheduled via phone or email.
Combination reviewers/ inspectors are used to reduce the need for duplicate inspections at a single project.	☐		All building inspectors are combination inspectors.
Building Inspectors conduct between 15 and 18 inspections or 8 to 10 stops per day.	☐		Based on the February 2020 data, an average of 267 inspections were completed daily. Based on 8 inspectors this averaged 33 inspections completed per day.
The city charges a re-inspection fee to encourage builders to make sure work is complete and ready to inspect at time of inspection.	☐		Reinspection fees are established and are used in the most egregious situations. A more formal policy on reinspection fees and when they apply may be beneficial for consistent enforcement.
Zoning inspections are completed before the certificate of occupancy (CO) is approved.	☐		Planners conduct zoning inspections and conditions of approval. Building inspectors ensure that Planning has signed off before CO is issued.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
For Certificate of Occupancy Inspection all applicable inspectors complete the inspection at the same time.		☐	Building is the last to inspection required to for sign-off final which equates to CO. All departments reviewing/inspecting project must be signed off prior to Building. Other department inspections are completed as staff are available and are independent from the Building inspection process.
Technology Utilization			
Applicants can apply, pay for, and receive permits, some instantly, using an on-line portal.	☐	☐	Planning and Building have implemented temporary measures for online permit submittals due to the Covid19 pandemic. Online instant payments are limited, this should be included in any permitting system solution. The payment portal creates difficulties with classifying posted transactions. Finance staff have issues reconciling payments with the permit / application.
The permit software system can calculate the appropriate plan check and permitting fees.	☐	☐	Building and Planning permitting systems are used to calculate fees. Public Works fees are not calculated in the system.
Applicants can look up status of a permit, including comments from reviewers on-line or using the software.	☐	☐	Building provides real time tracking of their permit applications. This feature should be expanded to all development application types.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Staff can look up the status of a permit, including comments from reviewers, on-line or using the software.	☐	☐	Building/Fire comments are uploaded to MVPS / File Maker and are accessible to their staff only. Planning and Public Works comments are not accessible via the software system. They are stored in the individual application shared folder. Housing, forestry, environmental safety staff do not currently have access to permitting systems but may request read only access to Serena and MVPS.
Permit tracking software is used to manage the permit intake, review, and issuance process as well as related inspections.	☐	☐	Each functional area has their own software solution and other departments have very limited access to check the status of other division's applications, permits, and inspections. Building utilizes MVPS to track their permit and inspection status. Planning and Public Work application status tracking is limited with their software.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
All plan review comments are entered into the system and available to other reviewers, permit techs, and applicants (via the front end).	☐	☐	Building staff upload their comments to MVPS and other building staff can access the comments. Planning comments are attached to the comment letter which is stored in the project files on a city share drive. Public Works comments are stored in their respective project files. Housing, forestry, environmental safety staff do not currently have access to permitting systems but may request read only access to Serena and MVPS.
The permitting system electronically routes applications to all reviewers, who can also electronically approve, disapprove, and provide comments.		☐	Building and Planning applications are routed via a shared drive folder.
The City is moving towards a paperless system for all stages of permitting and development review.	☐		The Covid19 pandemic has expedited the process to transition to digital. This project will assess the technology needs of the development review process.
The permitting system generates clear, user friendly reports on permitting activity which can be posted to the internet.	☐	☐	Building can run an excel report of monthly workload statistics. Planning has the ability to run reports regarding number and types of reports. However, timeline information is not captured in the software.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
The permitting software has the ability to capture time associated with a particular permit application.	☐	☐	Building can capture the timeline associated with applications in their software system. Planning does not have the ability capture time with each application. This is calculated manually by email date stamps. Public Works does not capture time spent on each application, but rather the overall turnaround time.
Development staff has access to applicable GIS layers.		☐	Staff have access to "apps" published by IT, but staff indicated limited functionality with these programs.
The general public can look up zoning information, flood zones, and other pertinent information using Web GIS.	☐	☐	The Planning webpage has a link to an interactive zoning map. The City does not have a web-based GIS system that the public can easily access information. The City does have an open data portal where the public can download GIS Shapefiles.
Inspectors enter inspection results and correction items in the field via tablet and have it instantly available and viewable on-line.	☐	☐	Building and Fire inspectors have the ability to complete inspection results in the field via tablet. All other development related inspectors do not have the ability to enter inspection results electronically in the field.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
The permitting software system is utilized as a database for all development related information for the parcel/address.	☐	☐	Building has a comprehensive permitting system that they use as a database for their applications. Planning and Public Work's systems are not used as a database. A consolidated permitting software system should be used as the repository for all development related information by address or parcel identifier.
One software system is utilized for all permitting, inspection, and code enforcement functions in the City.		☐	Building, Planning, and Public Works has their own respective software solutions. Access is limited to respective divisional personnel only.
Permitting software users are provided with new user training upon hiring with the City.	☐	☐	This varies by functional area and no formal training program exists.

5. Process Review Timelines

In several of the best practices described in the previous section there were several that focused on performance timelines. It is important to understand the City's desired performance goals. The following table outlines the turnaround time by application type.

Application Type	Review Timeline
Building / Fire Permits	
Commercial Plan Check (New Construction)	6 weeks
Single Family Plan Check (New Construction)	4 weeks
Simple Building Permits	Over the Counter
Photovoltaic / Electric Vehicle	2 days

Fire Permit Review	3 weeks
Planning and Zoning	
Sign Permit	Over the Counter or 2 weeks
Change of Use	1 week (non-PCC), 6 weeks (PCC)
Minor DRP/PCP (Admin)	3 months
Major DRP/PCP (ZA)	6 – 9 months
Minor Telecom	2 months
Major Telecom	3 months
CUP/PUP for use or parking	6 months
Historic Permit	30 days
PUD	9 months (no CEQA), 12 months (CEQA)
PUD Modification	3 months
FAR Exception	3 months
Sidewalk Cafe	1 month
Variance	6 months
Subdivision/Map	3 months (map only)
General Plan or Zoning Map Amendment (gatekeeper) with Development Project	18+ months
Public Works	
Excavation Permit	15 days
Temporary Encroachment Permit	OTC
Encroachment Permit	15 days
Site Improvement / Parcel Final Maps	6 weeks