



City of Austin site plan review

Final compendium

July 2023

Executive summary

The City of Austin commissioned an independent assessment of the administration of its site plan review process. The assessment focused upon how to improve overall customer experience and efficiency. The assessment employed a range of approaches, including surveys of staff and customers, workshops, interviews, process mapping, inventorying technologies, and identification of potential points of duplication or overlap in interpreting the Land Development Code. The assessment showed customers and staff are dissatisfied with the current process. Eleven departments operate in a siloed manner with different visions and priorities. Across the 11 departments 250+ staff are involved in the process with varying levels of involvement. Staff administer the site plan review process prescribed by the Land Development Code through inconsistent processes, multiple, sometimes outdated technologies, and ad-hoc cross-departmental coordination. Facilitated dialogues with staff and customers, along with consideration of process improvement best practices, helped identify an initial set of potential initiatives to improve the overall customer experience and cycle time. Implementing such a portfolio of initiatives could involve a concerted effort across all the eleven departments engaged in the site plan review process. Implementing “quick wins” co-developed with City subject-matter experts could generate momentum for change, demonstrate tangible improvements, and lay the foundation for longer-term initiatives to establish new ways of working that improve customer experience and the overall cycle time of the site plan review process.

1. Customer experience: A survey of 178 customers highlighted dissatisfaction across the site plan review process (3.0 out of 10), especially within the formal review phase (2.8 out of 10), with respondents citing challenges with reliability and consistency; workshops hosted by the Development Services Department (DSD) engaged 20+ customer organizations with significant site plan experience who identified 30+ pain points throughout the process.

2. Strategy: Input from 150+ City of Austin staff engaged through interviews, surveys, and workshops highlights the 11 participating departments lack a common vision, definition of customer, and priorities for administration of the site plan review process.

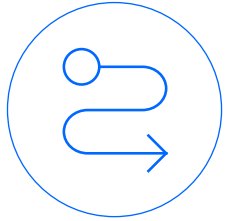
3. Processes: Inconsistent and unstandardized processes occur throughout departments; the Land Development Code and Criteria Manuals include at least 47 regulations that have 2+ departments conducting reviews on the same codes/metrics, and, therefore, introduce potential redundancies and differing interpretations; multi-departmental processes depend on 18+ technology platforms, some of which that are outdated, inconsistently utilized, and lack desired future-state capabilities.

4. People: 250+ people and 4,100+ weekly hours are invested in the site plan process with varying levels of involvement between DSD and partner departments; the overall culture is more compliance-oriented than customer-focused; turnover and training gaps impact readiness, quality, efficiency, and relationships across departments and with customers; no systematic set of operational excellence practices across the departments drive performance and continuous improvement.

5. Structure: Interdepartmental governance, as well as roles and responsibilities, are unclear across DSD and partner departments; virtual participation by reviewers has inhibited relationship-building and confidence in applicants’ ability to address challenges in a timely manner.

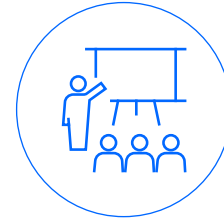
6. Potential initiatives: DSD and partner departments co-created a list of initiatives to address critical aspects of the strategy, process, people, and structure, including identifying quick wins and foundational enablers to support effective implementation.

A robust assessment was completed for the City of Austin's site plan review process



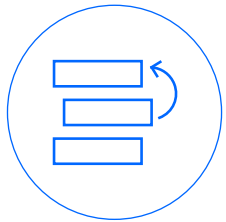
18 

process maps developed



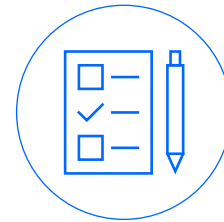
20+

customer organizations engaged in 3 workshops to identify challenges and initiatives



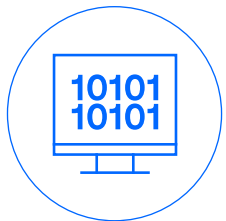
1,470+ 

steps analyzed across 29 formal review processes



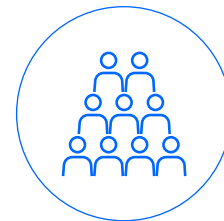
178

customers providing feedback through customer experience survey



18 

internal and external-facing technology platforms identified



150+

City of Austin staff engaged through interviews, surveys, and workshops

1. Customer experience

1. Customers report a cumbersome and frustrating site plan review process

● Details follow



A. Overall satisfaction

- Austin's site plan review process is rated as **3.0 overall** (out of 10)
- The formal site plan review process is the **lowest rated phase at 2.8** (out of 10)
- The site plan review process **lags the U.S. benchmark for state permitting and licensure processes by ~34x**



B. Customer journeys

- **~80%** of respondents reported submitting **3+ times** to resolve formal review comments
- **~20%** of overall satisfaction depends on **interactions with City departments and resolving final-stage review comments**



C. Satisfaction drivers

- **~80%** of respondents reported taking **longer than one year** to receive a permit
- **Reliability and consistency** drives 12%+ of satisfaction for each process phase
- Respondents rated all **departmental key satisfaction driver levels below a 5.6** (of 10)



D. Customer costs

- In 2022, the average total review days per application was **~345 days**
- Permitting delays cause additional costs to the customer, **contributing to overall development costs in Austin**

Source: Discussions and interviews with DSD and partner departments (Apr-Jun 2023)

Source: Review of public sources and expert interviews

Source: [State of States Survey, 2022](#)

Source: Amanda data as of May 2023



1A. Understanding the customer experience survey



Customer survey

Format: Online survey

Participants / sample: 178 respondents, 90% based in Austin MSA, including applicants, developers, owners, and licensed professionals with experience in Austin's site plan process within the last ~2 years

Objective: Obtain quantitative and qualitative perspectives across different customer archetypes

Approach: 30+ questions to understand:

- Context on the customer
- Process / journey involvement and ratings
- Satisfaction drivers and ratings

● Details follow

Thinking about the most recent time you were applying for and/or receiving a site development permit from the City of Austin, please rate your satisfaction or dissatisfaction with the following phases of the experience:

Thinking about the most recent time you were applying for and/or receiving a site development permit from the City of Austin, which of the following steps did you experience? Please select all that apply.

Applic
intake
(e.g. s
docume
comp
check,
fees
Form
plan
phase
receive
com
report,
upd
docume
(
Pe
issua
Receiv
perm

☐

Dev

☐

Per

☐

doc

☐

(13

☐

(7)

☐

(13

☐

☐ 1 - Extremely dissatisfied (1)

☐ 2 (2)

☐ 3 (3)

☐ 4 (4)

☐ 5 (5)

☐ 6 (6)

☐ 7 (7)

☐ 8 (8)

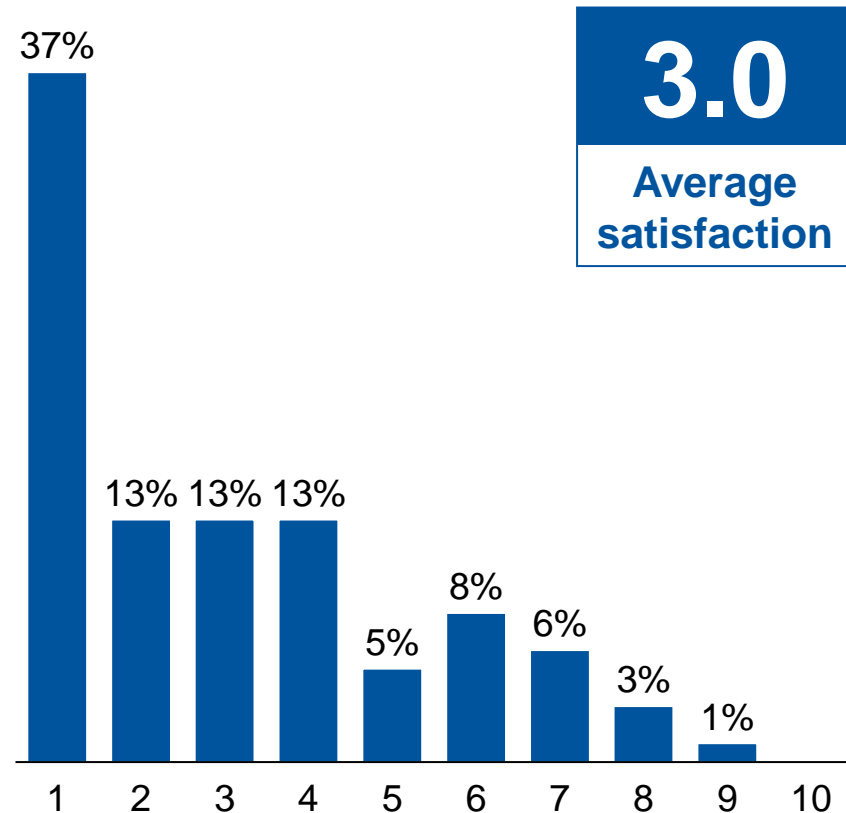
☐ 9 (9)

☐ 10 - Extremely satisfied (10)

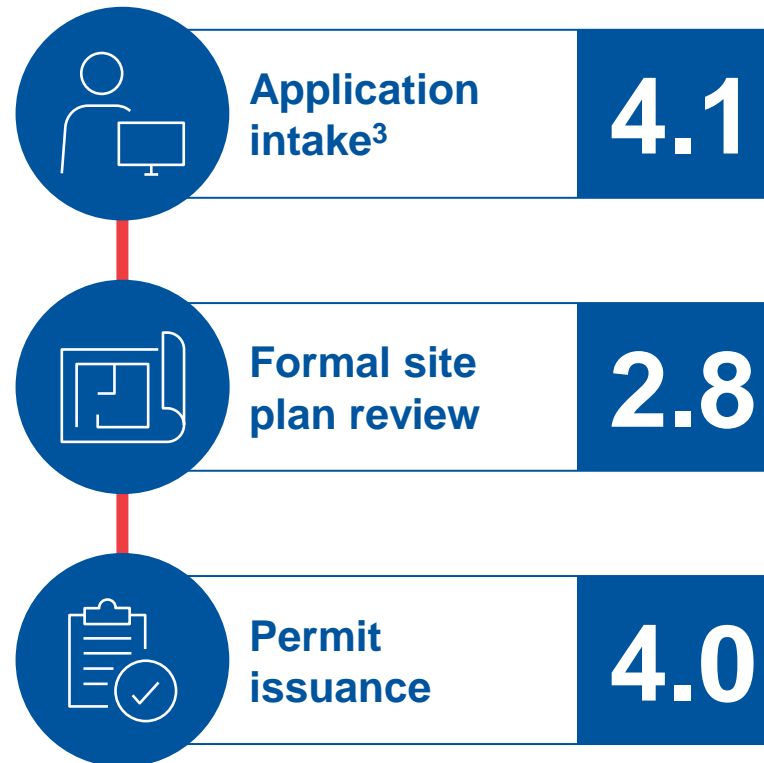
1A: Reported satisfaction with the overall site plan review process is low

Overall satisfaction scores by rating (1 to 10)¹

% of respondents, N = 178



Satisfaction scores by phase² (1 to 10)



Insights

- ~76% of respondents reported low overall satisfaction scores of 4 or below
- ~1% of respondents indicated a high satisfaction score (9 or 10)
- Respondents rated the **formal site plan review phase** as the lowest of all three phases, with an **average rating of 2.8**

Source: DSD customer survey results (May 2023)

1. Question: "Thinking about all your experiences, overall, how satisfied or dissatisfied are you with your experience applying for and/or receiving a site development permit?"

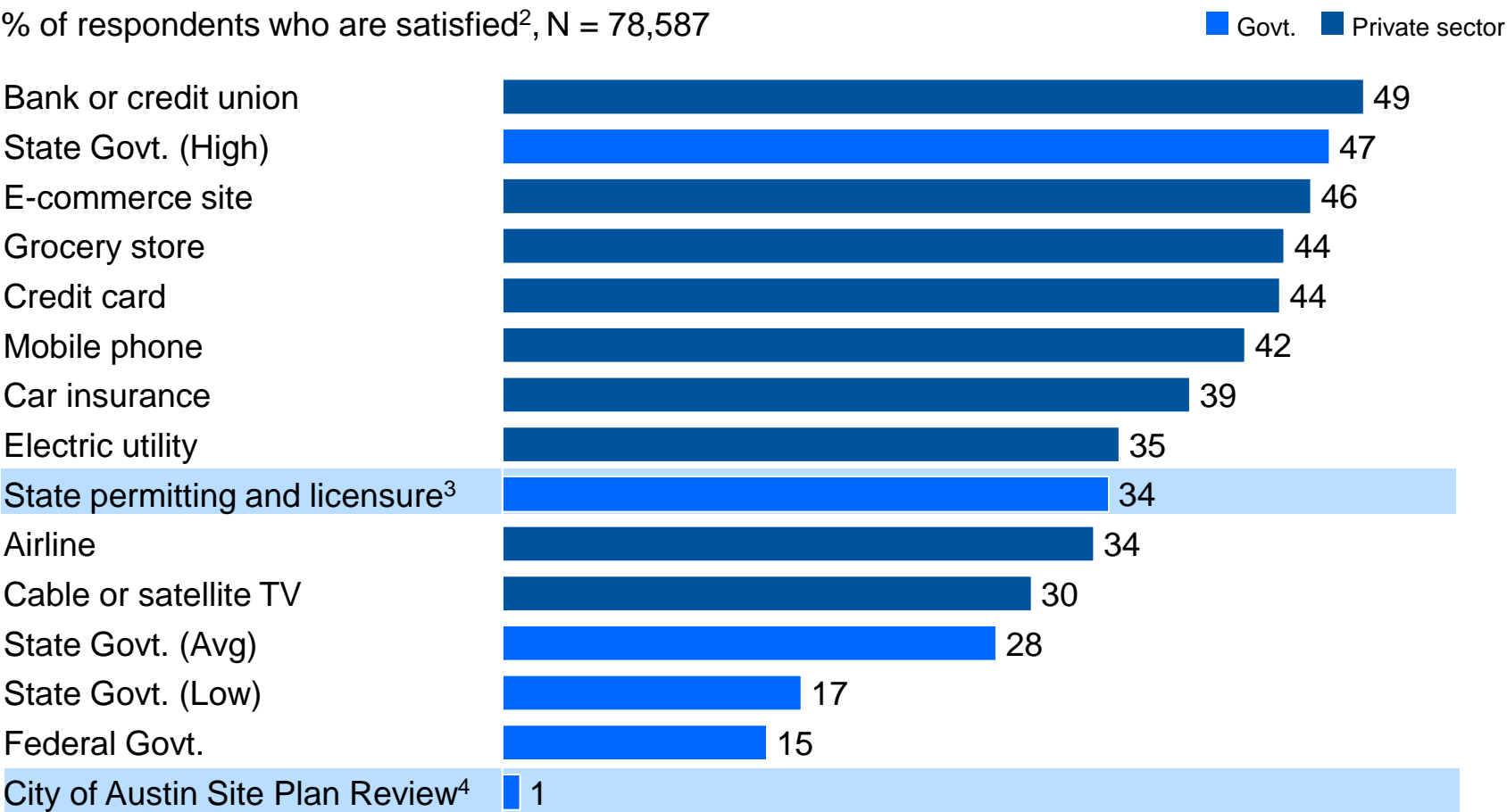
2. Question: "Thinking about the most recent time you were applying for and/or receiving a site development permit from the City of Austin, please rate your satisfaction or dissatisfaction with the following phases of the experience."

3. Within the DSD customer survey, the application intake phase includes the completeness check process

1A. City of Austin site plan review lags in customer satisfaction compared to a range of benchmarks

Comparison of state government to private and public sector benchmarks¹

% of respondents who are satisfied², N = 78,587



Insights

- Austin’s site plan review process has **lower satisfaction scores** than services provided by **private and public sector**—including cable TV, airlines, and the federal government
- When benchmarked against U.S. state permitting and licensure satisfaction levels, **Austin’s site plan review process lags by ~34x**

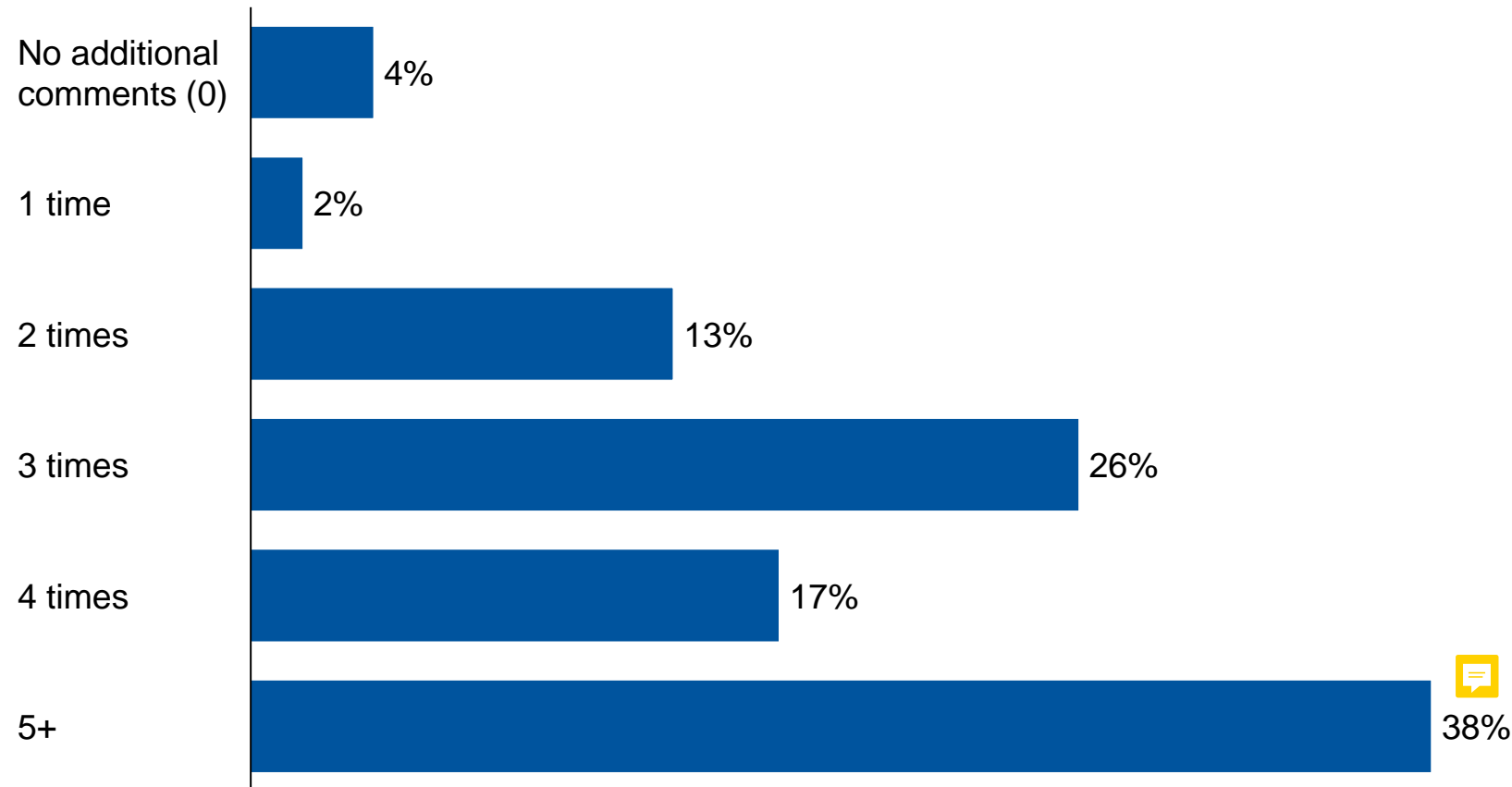
1. Source: [State of States Survey, 2022](#)
2. % of respondents selecting a 9 or 10 on a scale of 1 to 10 of the individual services
3. Average scoring across sporting licenses, vehicle services, professional licenses, business registration, and economic development permits
4. Source: DSD customer survey results (May 2023)



1B. ~80% of respondents reported submitting 3+ times to resolve formal review comments

Number of follow-up submissions required during respondents' most recent application experience¹

% of respondents, N = 178



Source: DSD customer survey results (May 2023)

1. Question: "Thinking about your most recent experience applying for and receiving a site development permit, how many times were you required to resolve any additional comments during the Formal Review phase?"

Insights

- **38% of respondents reported 5 or more submissions necessary to resolve comments**
- **6% of respondents reported having no additional comments or taking 1 re-submission to resolve**

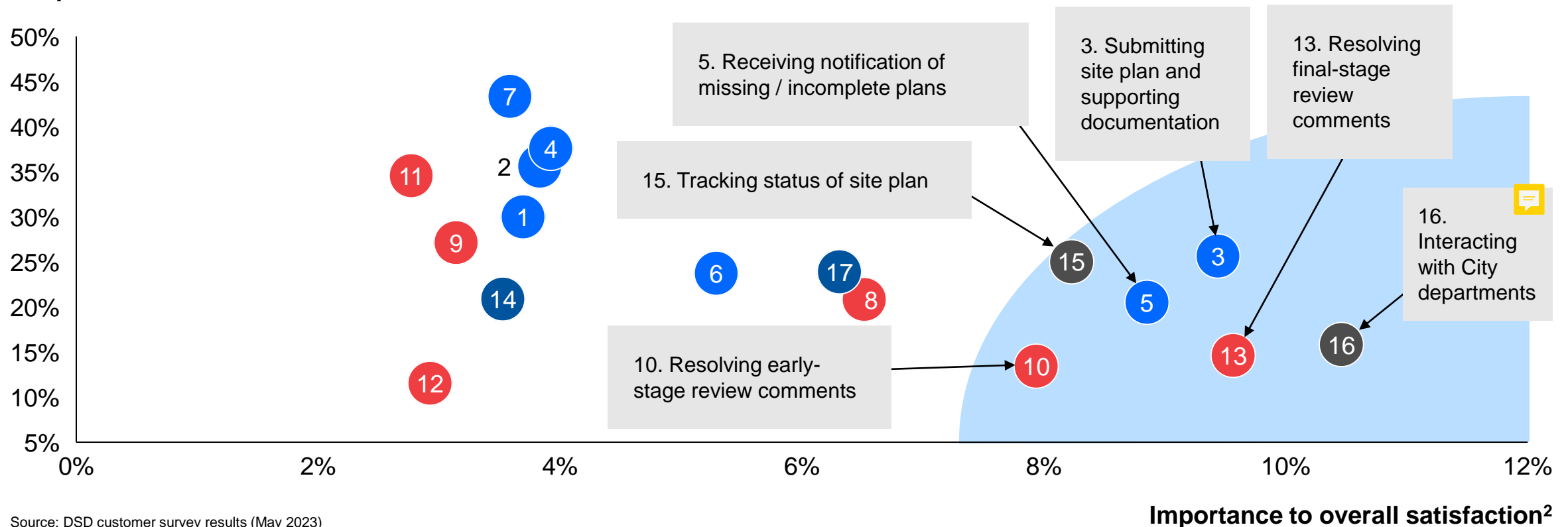
1B. ~20% of overall satisfaction depends on interactions with City departments and resolving final-stage review comments¹

Customer satisfaction and importance of customer journeys by application phase

% of respondents satisfied vs % of importance to overall satisfaction, N = 178

Respondents satisfied³

■ Focus area ● Application intake⁴ ● Formal review ● Permit issuance ● All phases



Source: DSD customer survey results (May 2023)

1. Question: "Thinking about the most recent time you were applying for and/or receiving a site development permit from the City of Austin, please rate your satisfaction or dissatisfaction with the following experience(s)."

2. Derived importance r-sq = 0.60; derived importance calculated using Johnson Relative Weights methodology. Satisfaction drivers correspond to bubble numbers in appendix

3. % of respondents selecting a 7,8, 9 or 10 on a scale of 1 to 10 of the individual journey

4. Within the DSD customer survey, the application intake phase includes the completeness check process

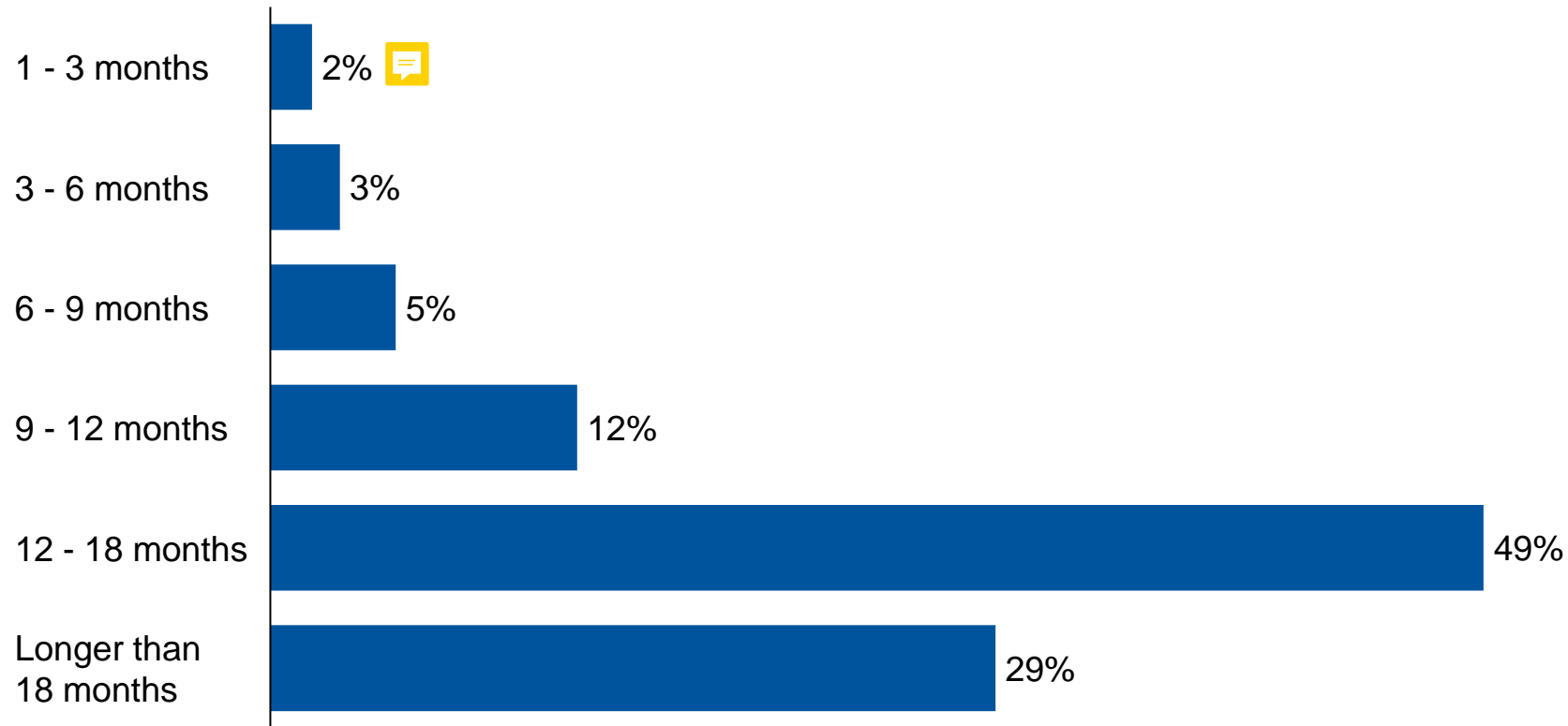
Details in appendix



1C. ~80% of respondents reported taking longer than one year to receive a permit

Time to receive most recent permit¹

% of respondents, N = 178



Source: DSD customer survey results (May 2023)

1. Question: "Thinking about your most recent experience applying for and receiving a site development permit, approximately, how long did the process take?"

Insights

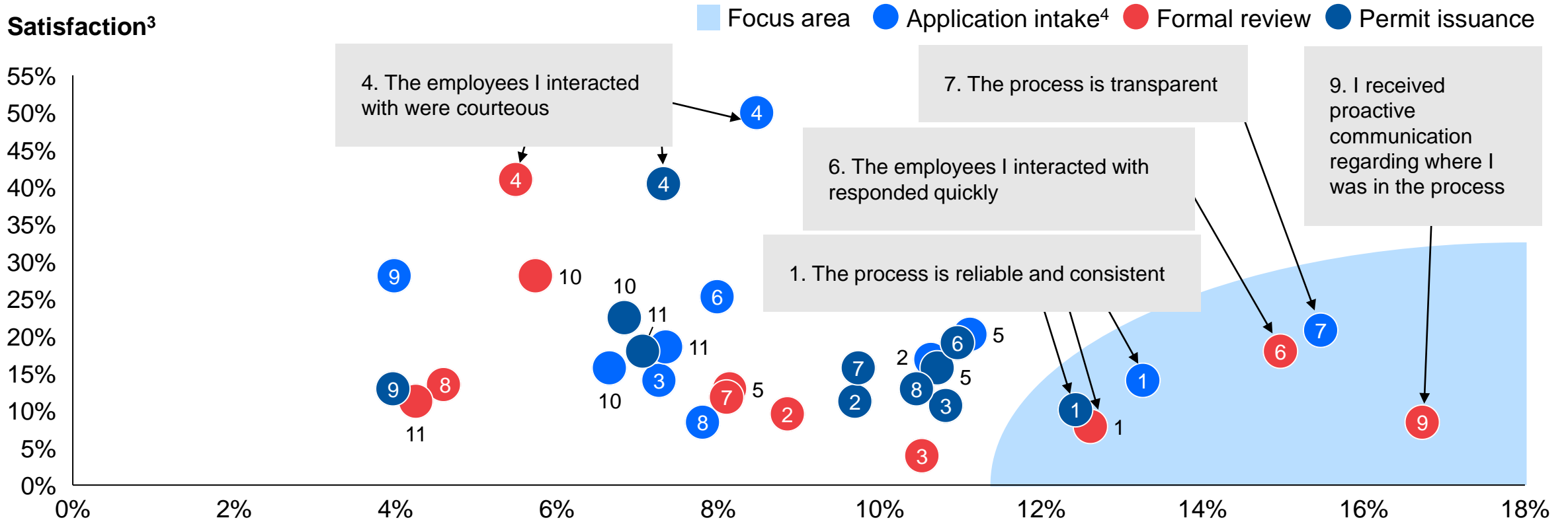
- ~30% of respondents reported taking longer than 18 months to receive their most recent site development permit
- 5% of respondents reported taking 6 months or less to receive their most recent site development permit

1C. Reliability & consistency drives 12%+ of the total satisfaction for each of the three process phases

Customer satisfaction with and importance of satisfaction drivers by application phase¹

% of respondents satisfied vs % of importance to overall phase satisfaction, N = 178

Satisfaction³



Source: DSD customer survey results (May 2023)

1. Question: "Thinking specifically about the most recent time you were in the application intake phase (e.g. submit documentation, completion check, paying fees) of the site application/site development permit process, please rate how much you agree or disagree with the following statement."

2. Derived importance $r\text{-sq} = 0.53$; derived importance calculated using Johnson Relative Weights methodology. Satisfaction drivers correspond to bubble numbers in appendix

3. % of respondents selecting a 7, 8, 9 or 10 on a scale of 1 to 10 of the individual satisfaction driver

4. Within the DSD customer survey, the application intake phase includes the completeness check process

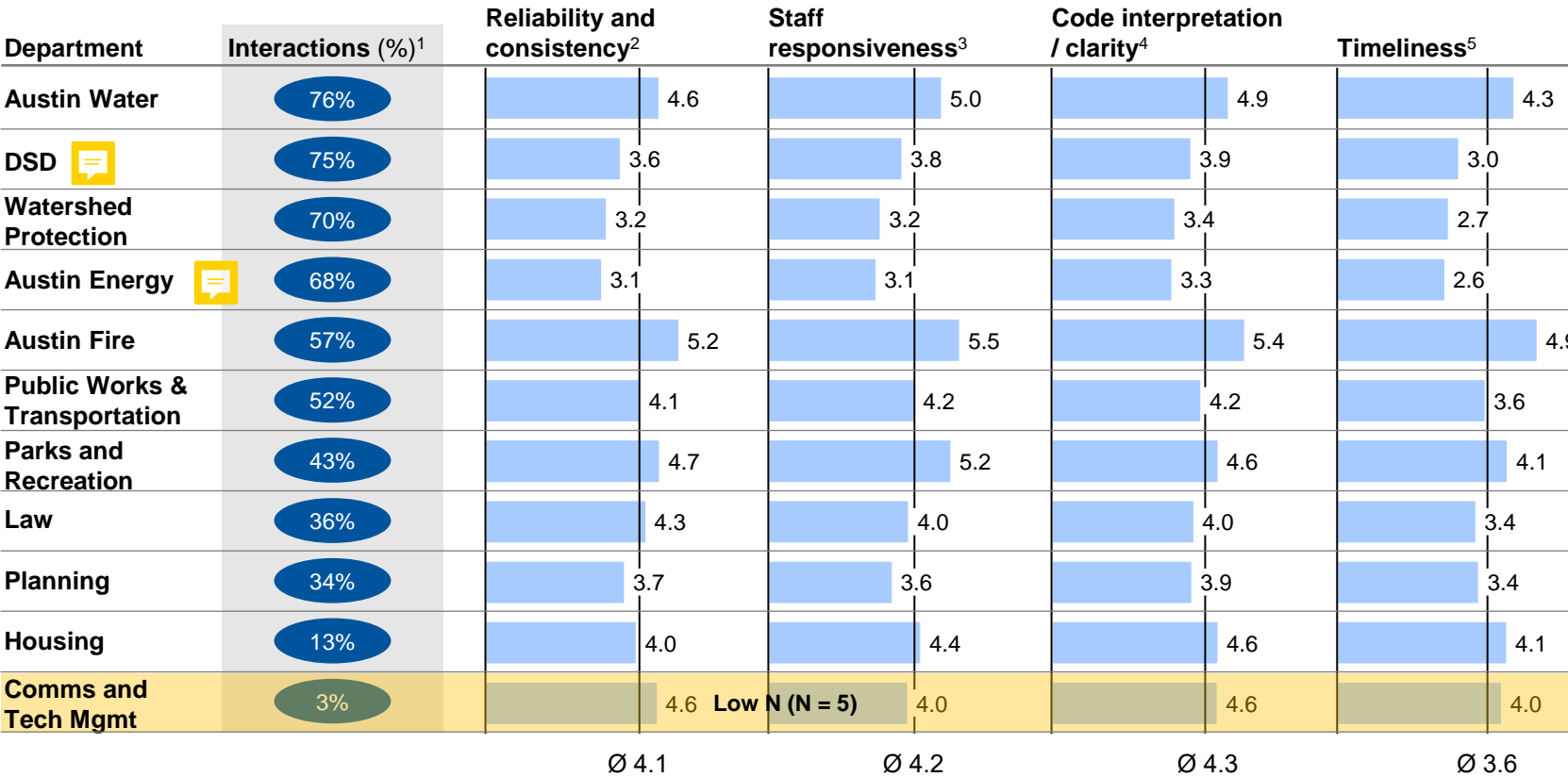
Details in appendix



1C. Respondents rated all departmental drivers of satisfaction below 5.6 out of 10

Interactions and customer satisfaction scores by department

% of respondents interacted with and average satisfaction score (out of 10), N = 178



Source: DSD customer survey results (May 2023)

- 1. Question: "Thinking about your most recent site plan application experience, which additional city departments did you have to interact with?" N = 178
- 2. Question: "How satisfied or dissatisfied are you with regards to reliability and consistency with the following departments?"
- 3. Question: "How satisfied or dissatisfied are you with regards to staff responsiveness with the following departments?"
- 4. Question: "How satisfied or dissatisfied are you with regards to site development permit related code interpretation/clarity with the following departments?"
- 5. Question: "How satisfied or dissatisfied are you with regards to end-to-end process timeliness with the following departments?"

Insights

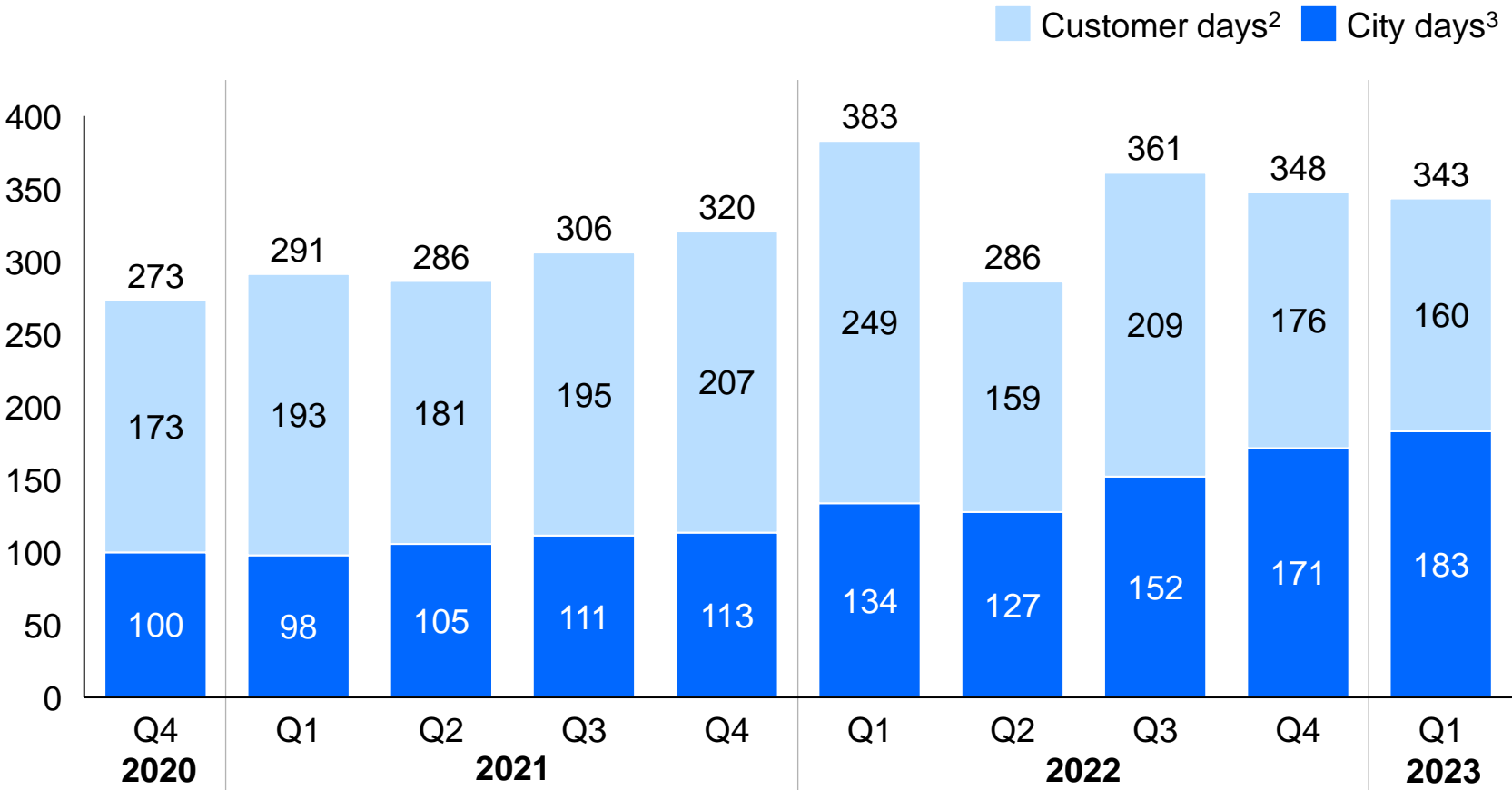
- 3 out of the 4 departments with the **most interactions** are the **lowest scoring on satisfaction** (Austin Energy, Watershed Protection, and DSD)



1C. From Q1 2021 to Q1 2023, average City review days per application rose from ~98 to ~183 days¹

Site plan application duration, Q4 2020-Q1 2023

Days, N = 901 applications



Source: Amanda data as of May 2023

1. Review days per application is calculated from the Amanda application intake date to the Amanda final approval date

2. Average total days for customer response per application, by approval date of application

3. Average total City review days per application, by approval date of application

Note: Capitol Market Research – City of Austin Development Applications Forecast detail exists in appendix comparing 2021 average total review days per application

Insights

- In 2022, the average total review days per application was **~345 days**, up from **~300 days** in 2021
- From Q1 2021 to Q1 2023, **average City review days per application increased ~85%**, while customer response time per application has decreased by ~15%



1D. Scenario estimates indicate site plan review delays increase developer carrying costs

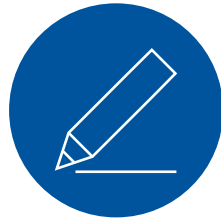
Illustrative estimates of monthly carrying costs for example scenario projects



Single family residential redevelopment¹

~\$9,700 carrying cost per month

7% of applications



Greenfield development²

~\$37,000 carrying cost per month

38% of applications



Multi-family residential redevelopment³

~\$546,000 carrying cost per month

3% of applications

Insights

- Carrying costs depend on scale and scope of development/redevelopment project
- Each month delay in the site plan review process adds to total project carrying costs, and, therefore, contributes to overall development costs

Source: Review of public sources and expert interviews

1. Key assumptions: Property value of ~\$566k, financed with 40% debt at 7.3% interest rate; future use is multi-family residential (duplex)

2. Key assumptions: Property value of ~\$1.3MM, financed with 50% debt at 7.85% interest rate; future use is multi-family residential

3. Key assumptions: Property value of ~\$38MM, financed with 40% debt at 6.8% interest rate; future use is multi-family residential

Details in appendix

1. Customer workshops: Understanding pain points



Customer workshops overview

Dates: 5/12 and 5/16

Attendees: 20+ organizations represented across applicants, developers, engineering firms, architectural firms, and professional associations

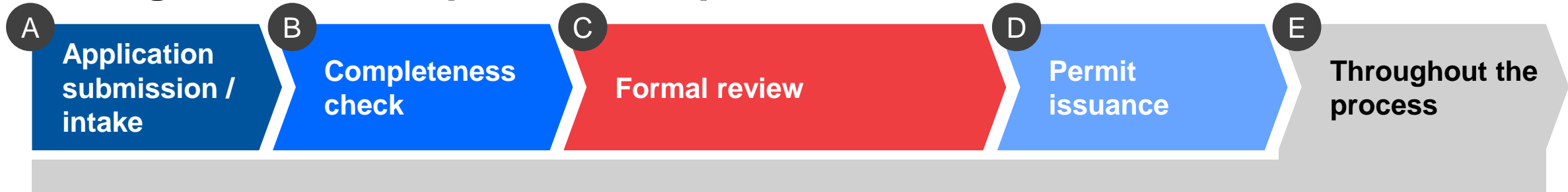
Objectives:

- Identify and understand pain points and challenges experienced by customers and applicants
- Gather context and first-hand accounts of pain points
- Prioritize pain points across phases for discussion
- Brainstorm potential initiatives to address prioritized pain points

Details follow



1. Customers identified numerous pain points throughout the site plan review process



- 1 **Lack of clarity regarding required documents** and standards for completeness
- 2 **Confusing fee calculation tables** are difficult to use
- 3 **File size limitation** for upload
- 4 **Uncertainty on submission status** – e.g., unclear if successfully uploaded, received, or distributed for completeness check

- 1 **Inconsistent case managers** throughout process – therefore, no single POC
- 2 **Inconsistent review** in terms of involvement, scope, and level of detail
- 3 Emphasizing **technical code compliance** during completeness check
- 4 10-day completeness check turnaround for City counts against **applicants' 45-day clock to reach formal submission**

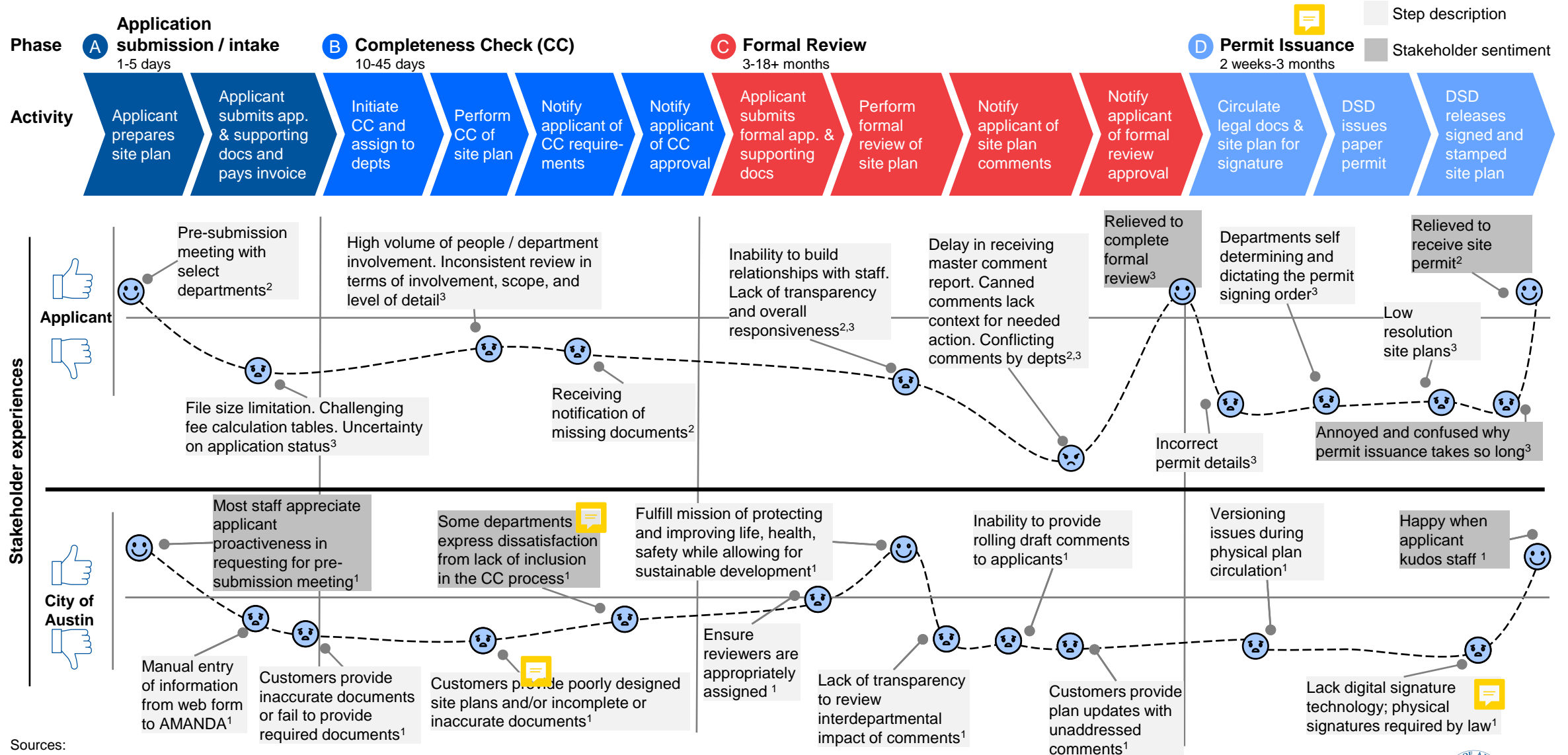
- 1 **Inconsistent overall quality of comments** (e.g., “canned” comments lack context for needed action)
- 2 **Conflicting department review comments** regarding specific code/metric
- 3 **Inconsistent review** within a department across applications and/or personnel
- 4 **Different interpretations or additional comments offered by a department** in an application’s later review cycles
- 5 **Delays receiving master comment report** (no draft comments)
- 6 New staff **lack adequate training** and familiarity with “case precedent”
- 7 **Finger pointing between departments** and no clear arbitrator
- 8 **AULCC** is a new and iterative process

- 1 **Incorrect permit details** (e.g., owner name)
- 2 Inconsistent and unclear **permit signing order**
- 3 **Low resolution site plans** (e.g., submitting a digital file → printing out → scanning back in)
- 4 **Permit issuance takes 4+ weeks**, requiring wet signatures
- 5 Reliance on traditional **“hard document” and mail services**
- 6 **Bottlenecks** or delays in technicalities with **legal review**

- 1 **Many people** and departments involved with uncertainty about roles & responsibilities
- 2 **“24-hour reply”** has been interpreted to mean 3 business days
- 3 **Overall lack of transparency** in review status
- 4 **Inconsistent customer service** (e.g., outdated staff directory, generic phone #, not in-person, off-camera during Zoom)
- 5 Building **relationships with staff** is difficult
- 6 **Staff don’t feel empowered**

1. Customer (applicant) and City of Austin staff are dissatisfied with the current process

As of 6/13/23



Sources:

1. Discussions and interviews with DSD and partner departments (Apr-Jun 2023)
2. DSD customer survey results (May 2023)
3. Customer workshops (5/12, 5/16, and 6/13/23)



1. Customer workshop: Prioritizing potential initiatives



Customer workshop overview

Date: 6/13

Attendees: 15+ organizations

Objectives:

- Review customer experience survey results
- Discuss pain points obtained from initial customer workshops and DSD + Partner Departments workshop
- Review, brainstorm, and prioritize potential initiatives, especially those within the next 3 months (quick wins) and the next 12 months



“ Everyone is frustrated with the process, and **something needs to change** to make the process work for both applicants and the city




“ This is a fantastic opportunity to **move forward with an overhaul** to improve the relationship between the department and those that are utilizing it



2. Strategy

A holistic approach to organization design dramatically increases the probability of success



 Focus for this section

Considerations

External research based on **survey of 1,200+ executives** shows...

- Redesigns often fail to deliver; **only ~30% of redesign efforts succeeded**
- However, a **structured approach** that pulls the full set of organizational levers has a **success rate of 86%**

2. Departments involved in Austin's site plan process have differing visions and goals



Highlights

- **Staff have differing viewpoints** on the **mission**, how to **accomplish priorities**, as well as who their **primary customer** is
- Staff acknowledge they **do not act as “one city”** and express dissatisfaction throughout the process
- **Alignment** on internal and applicant **pain points**
- **Passion** for respective values and missions
- From operational excellence survey results, staff self-rated **“Purpose and Strategy” below a 3.0** (out of 4); **purpose** defines why the organization exists, creating a common cause, with a **strategy** to achieve



Staff quotes

- “ We are “so mission driven” that being “customer service oriented is not the goal*
- “ No clarity around mission for site plan*
- “ Politics shift the baseline, and the goal posts keep changing*
- “ We’re looking at this systematically. In the past we have implemented band aids vs a paradigm shift*
- “ Our mission isn't about building more but building something sustainable*

2. DSD + Partner Department workshop: Align on pain points and prioritize potential initiatives



DSD + Partner Department workshop

Date: 6/01

Attendees: ~30 staff members across DSD and all partner departments

Objectives:

- Review customer workshop highlights and customer experience & operational excellence survey results
- Review, discuss, and prioritize customer and internal pain points
- Brainstorm and prioritize potential initiatives to address pain points



2. DSD and partner department staff do not share a common view of their “primary customer”

Word cloud¹ based upon responses to “who do you see as your primary customer?”²

N = 28 participants



Source: DSD + Partner Departments workshop (6/01)

1. Word cloud: The larger the word, the more frequently it appeared in responses

2. Question: “Who do you see as your primary customer when you approach your work in the site plan review process?”

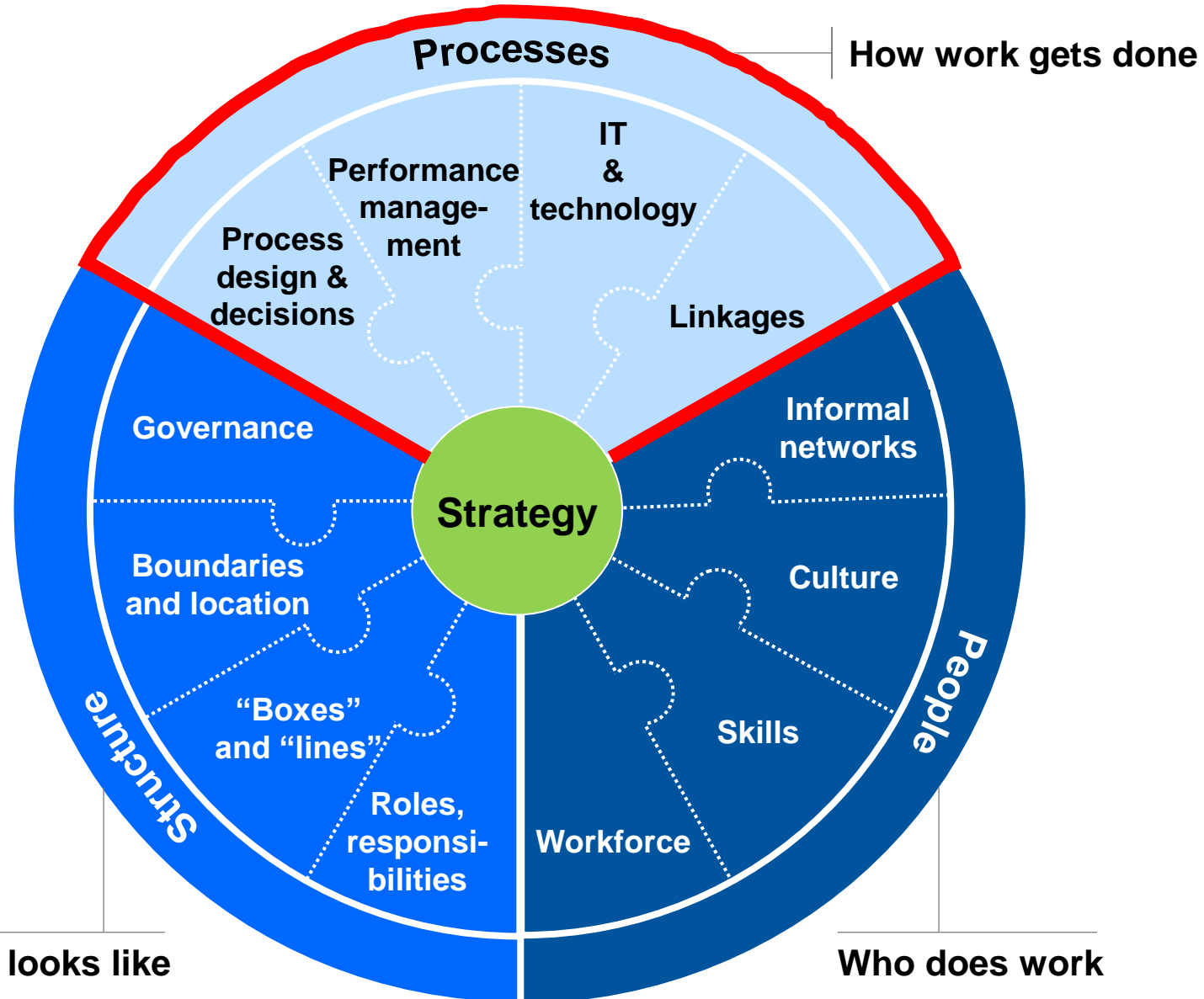
2. DSD & partner department staff identified numerous pain points throughout the site plan review process





3. Processes

A holistic approach to organization design dramatically increases the probability of success



 Focus for this section

Considerations

External research based on **survey of 1,200+ executives** shows...

- Redesigns often fail to deliver; **only ~30% of redesign efforts succeeded**
- However, a **structured approach** that pulls the full set of organizational levers has a **success rate of 86%**

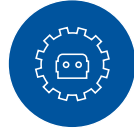
3. Inconsistent site plan processes use some outdated technology and contain overlapping review steps

● Details follow



A. Process design & decisions

- **Lack of consistent process map documentation**
- Informal, inconsistent, and **lack of standardized processes** throughout
- **100+ overlapping regulations and metrics reviews** could cause redundancies and/or conflicts



B. IT & technology

- **Outdated internal system of record** lacks capabilities, integration, and consistent utilization
- **Opportunity for automation and AI-assisted platforms** to accelerate review activities



C. Performance management

- **Inconsistent approaches to defining and tracking performance** and then using data within and across departments to improve processes
- Opportunity to establish capability and cadence to drive **continuous improvement within and across departments**



D. Linkages

- **Lack of established cadence inter- and intra- departmental meetings and informal connections** to facilitate coordination and prioritize continuous improvement

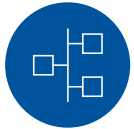
Source: Discussions and interviews with DSD and partner departments (Apr-Jun 2023)

Source: Site plan review document analysis (May-Jun 2023)

3A. Current-state site plan process maps did not exist



- Details follow



Overview

Objectives:

- Obtain process alignment within a given department
- Determine pain points and opportunity areas
- Develop current-state process map documentation

Approach:

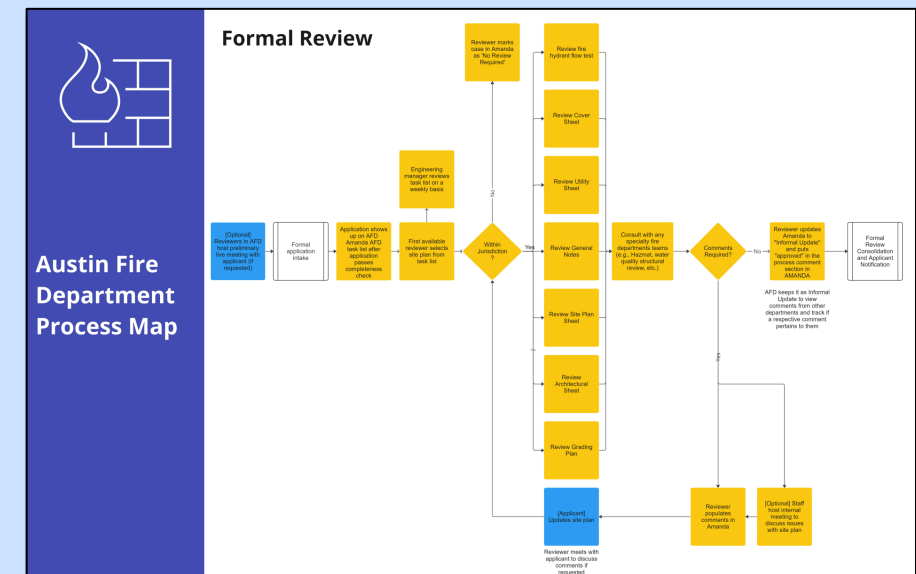
- Identified all departments involved in the site plan process
- Held working sessions with 60+ individuals to capture the current process, including parties involved, activities, systems/platforms, dependencies, etc.
- Co-developed 18 process maps across 11 departments

Source: Discussions and interviews with DSD and partner departments (Apr-Jun 2023)



Output and data captured

- Number of steps in process
- Responsible party for each step
- Number of handoffs
- Inter-departmental connections in process



Details in appendix

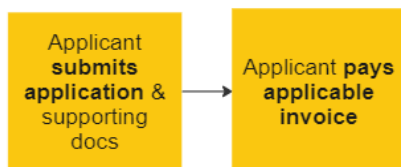


3A. The site plan review process has four distinct phases

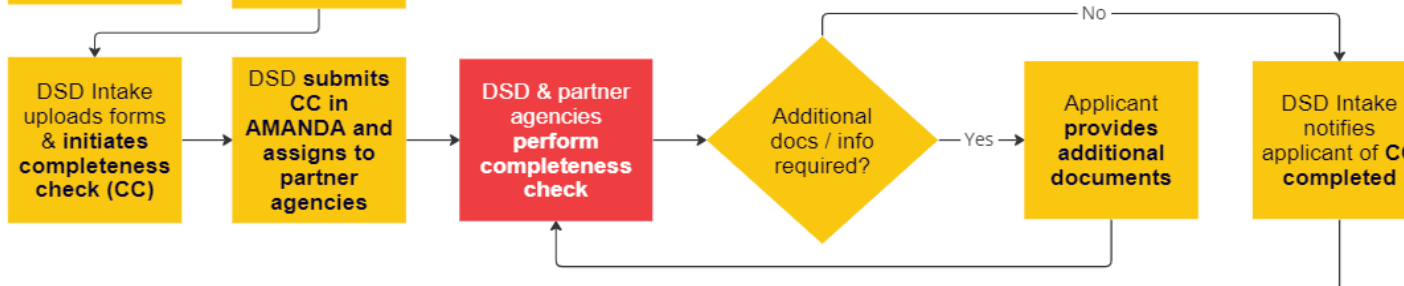
Details follow

Site plan review process map

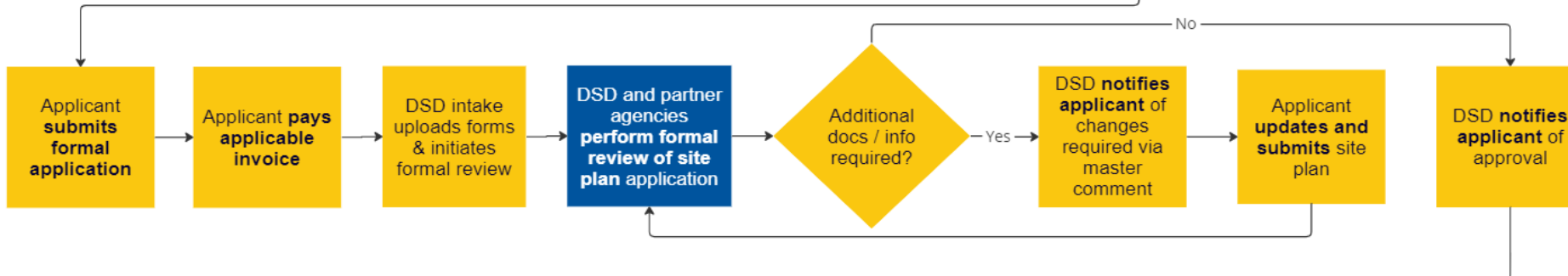
Submission / intake



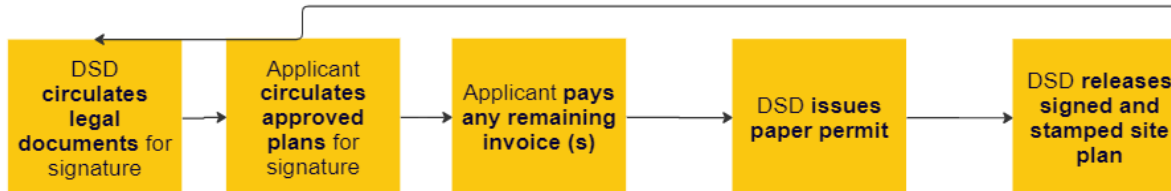
Completeness check



Formal review

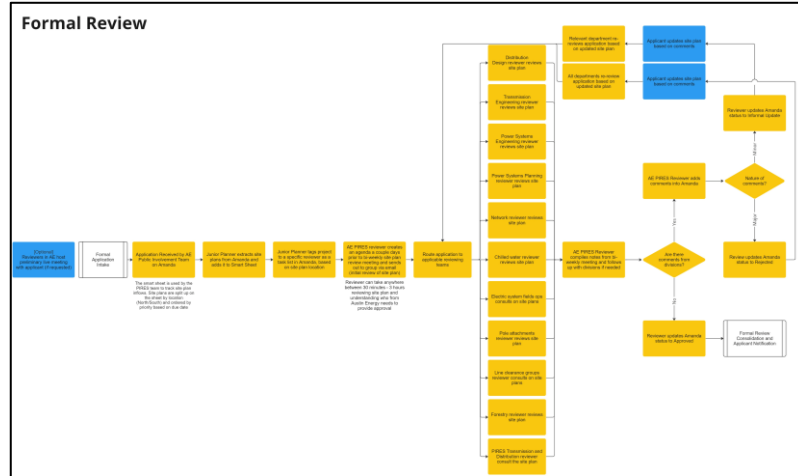


Permit issuance

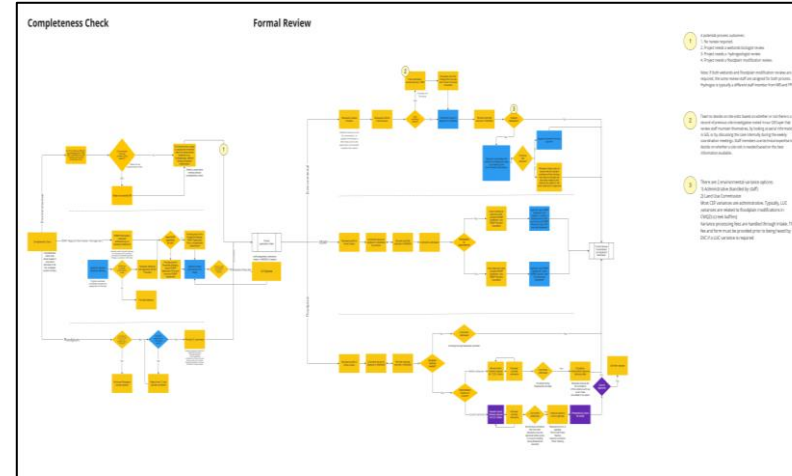


3A. The site plan review process varies across departments

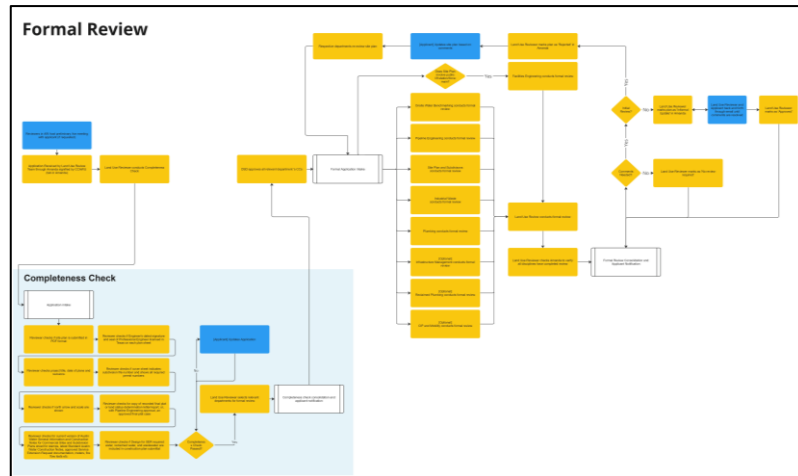
Energy



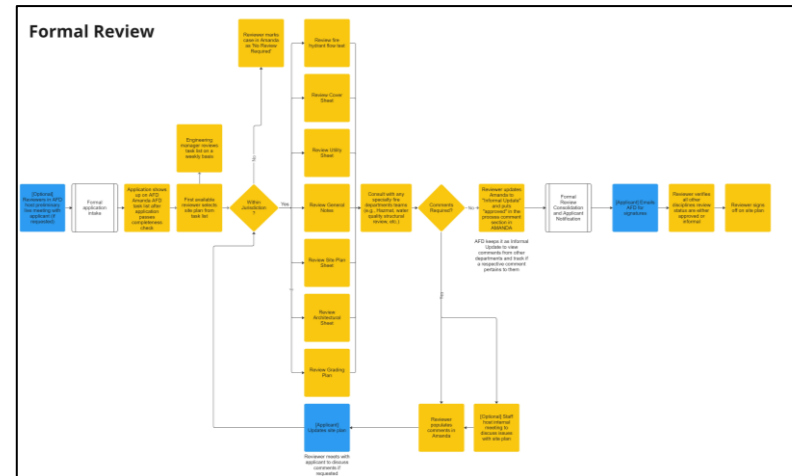
Watershed



Water



Fire

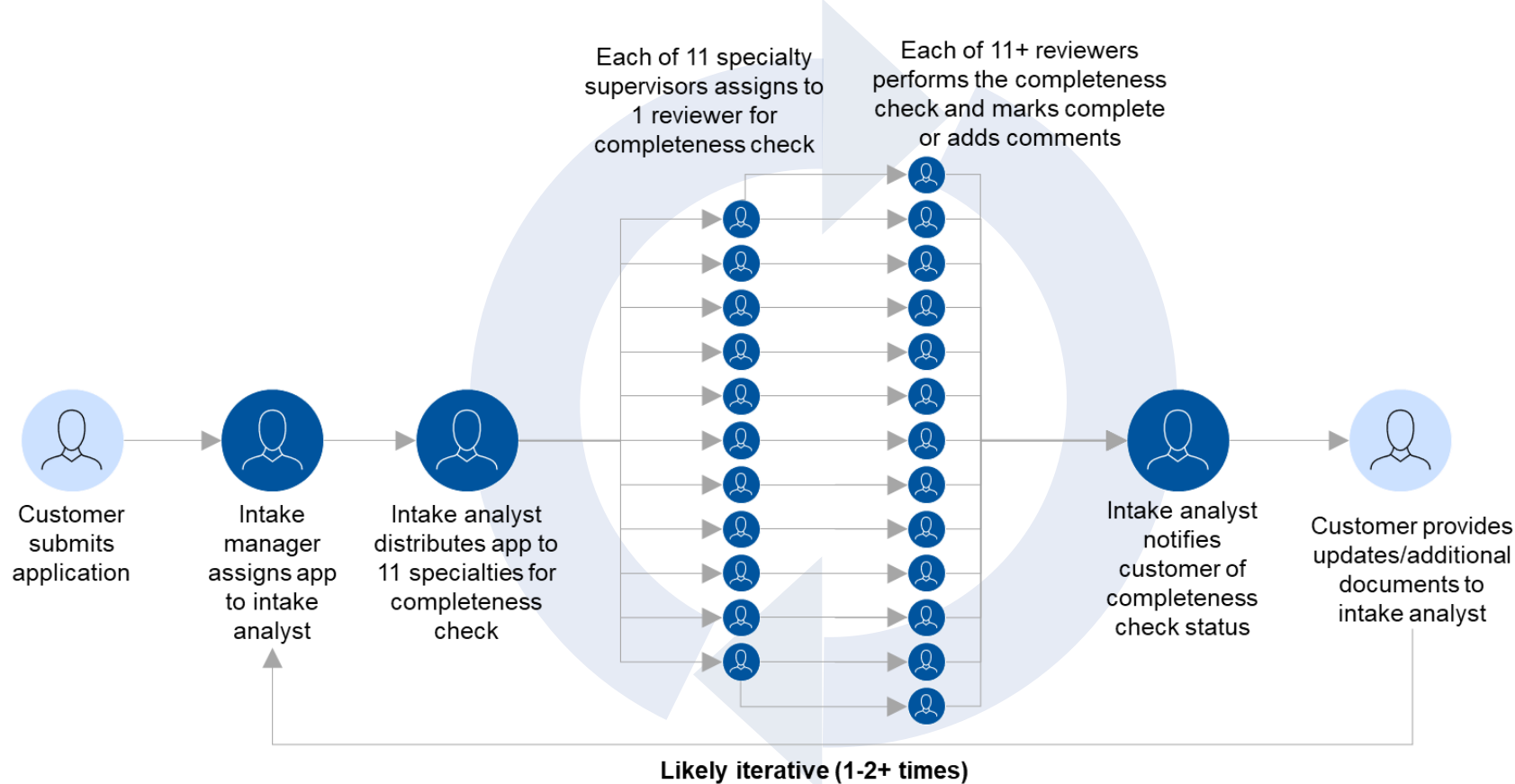


Insights

- **Reviews are inconsistent, siloed, and involve layers of workflow and review**
- Customers need to navigate **independent reviews** across departments
- **Numerous reviews** with varying requirements, e.g.,
 - Energy: **11** unique reviews, tracked in Smartsheet
 - Water: **8** unique reviews
 - Watershed: **3** unique reviews

3A. Iterative completeness check process involves 28+ handoffs, yet is limited in scope and efficiency

Completeness check phase – information flow

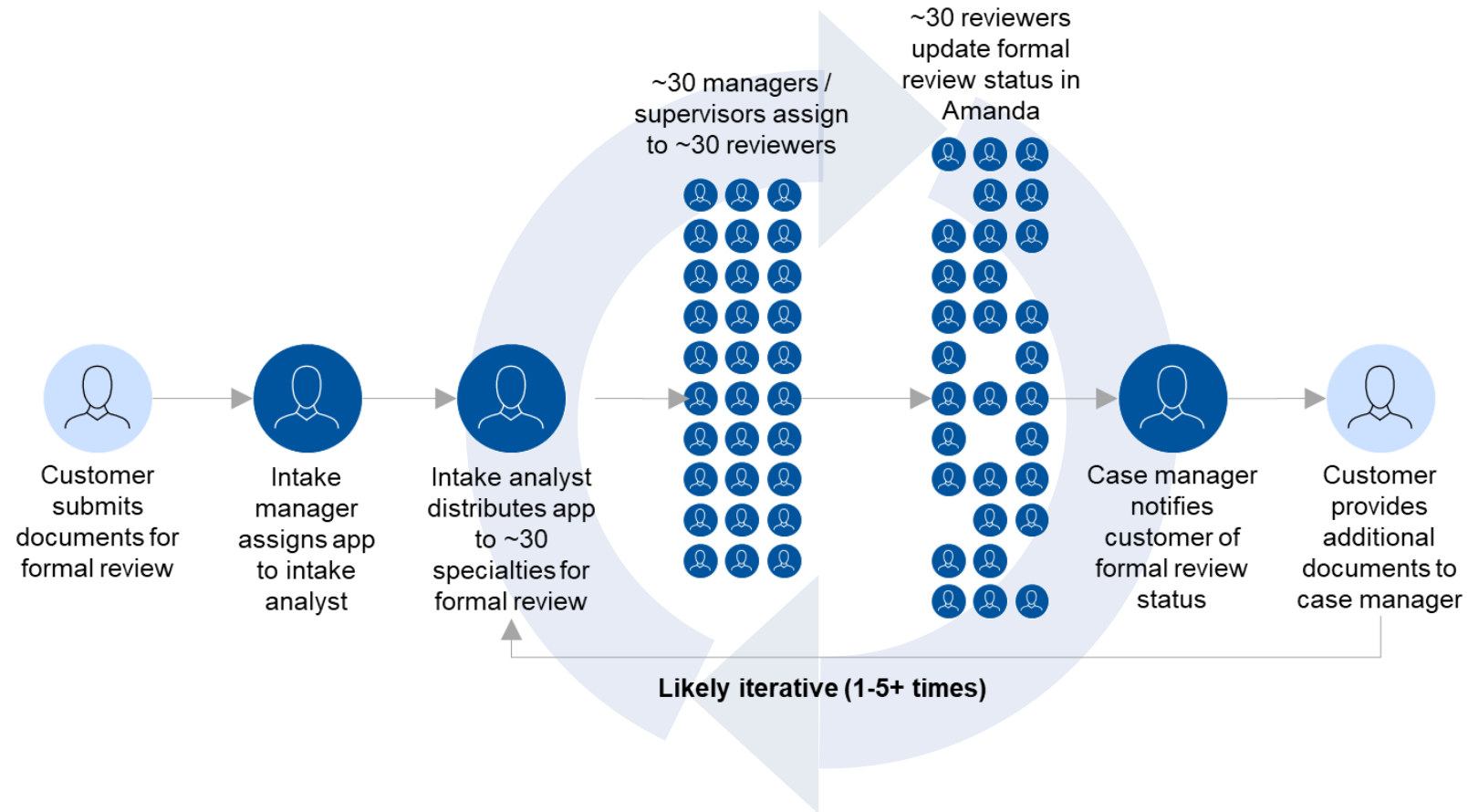


Insights

- **Efficiency:** 28+ people involved in handoffs introduces opportunity for human error, delays, and inefficiency
- **Scope:** 11 specialties of the 41 involved in site plan review are formally assigned in Amanda, leading to **possible gaps in the completeness check review**

3A. Iterative formal review process involves up to 64+ handoffs, and is inconsistent and time consuming

Formal review phase – information flow



Insights

- **Efficiency: 64+ people** involved in handoffs introduces opportunity for human error, delays, and inefficiency
- **Inconsistent:** Departments operate **processes to fit their review type and style**, and departmental requirements / workflows

3A. The City administers a complicated and ever-changing code



Code is large and complicated

- **~1,800 regulations** from the Land Development Code (Title 25) of the City's Code of Ordinances – **880 pages**
- **8 technical criteria manuals** to interpret and specify requirements established in the Land Development Code
- **9 building technical code manuals** to reference for review



Code amendments are common

- Since 2009 (the last 15 years):
 - **269 amendments** have been **initiated** (~18 per year)
 - **163 amendments** have been **adopted** (~11 per year)

3A. Site plan review steps across 29 specialties were analyzed

Overview

Objective:

- Understand and document **departments involved** in formal review, corresponding **steps and ownership**, which **codes or regulations** are reviewed, and possibility for **digitization**

Approach:

- Developed a template** to capture key steps and data
- Facilitated initial workshop** to guide staff through the purpose and method of documenting site plan review steps
- Reviewed completed documentation** for:
 - Completeness:** All formal review steps included
 - Level of detail:** How granular the data being provided was
 - Quality:** Volume of data cleansing required
- Standardized formatting** across documents to assist analysis
- Performed analysis** (regulations, metrics, steps, etc.)

Source: Site plan review document analysis (May-Jun 2023)

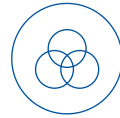
Example elements under review

- Step name:** Description of the step being performed
- Dependencies:** Step relies/depends on another step
- Duration:** Average time the review takes to complete
- RACI:** Who's responsible, accountable, consulted, and informed
- Input metric:** What is being analyzed (e.g., building height)
- Input source/format:** Metric location and data format
- Code/Regulation ID:** Specific source requirement reviewed

Step	Step Name	Department	Regulation/Code	Priority	Accountable	Responsible	Consulted	Informed	Input Metric	Input Source/Format	Input Location	Input Format	Code/Regulation ID	Regulation/Code	Regulation/Code Location	Regulation/Code Format	Priority	Review Date
1	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
2	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
3	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
4	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
5	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
6	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
7	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
8	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
9	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
10	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
11	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
12	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
13	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
14	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
15	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
16	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
17	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
18	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
19	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
20	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
21	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
22	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
23	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
24	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
25	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
26	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
27	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
28	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01
29	Site Plan Review	Public Works	Public Works	High	Public Works	Public Works	Public Works	Public Works	Site Plan	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	Public Works	High	2023-05-01

3A. Department reviews sometimes address the same codes and metrics

What could overlapping code/metric reviews indicate?



Redundancy: Multiple specialties reviewing the same metric/code for the same purpose

Conflict: Multiple specialties reviewing the same metric/code, but in a contradictory way

Mutually exclusive, parallel reviews: Multiple specialties reviewing the same metric/code, but doing so in non-contradictory, value-added ways



What are possible implications?



Redundancy: Additional cycle time that could also result in an inconsistent review

Conflict: Additional cycle time and an inability to provide customers clear and consistent guidance

Overlap may guide focus for:

- Inter- or intra-departmental problem solving
- Criteria manual reconciliation
- Formalizing approach around LDC additions / changes
- KPIs and metrics
- Standardizing completeness check and formal review phases

3A. Analysis of the review steps for 29 specialties uncovers overlapping code/metric reviews¹



Regulations

~**750** regulation items (manuals, sections, codes, etc.) interpreted

47 sections / codes³ referenced by 2+ specialties, including 12 codes reviewed by 3+ specialties



Metrics

~**815** metric items (e.g., benches, street type, sidewalk width) reviewed, including ~**365** metric themes⁴

90 metric themes reviewed by 2+ specialties, including 29 themes reviewed by 4+ specialties



Steps

~**1,470** total steps
~**785** average labor hours per review cycle
Each specialty review cycle ranges from ~**1 hour to ~220 hours**²



Digitization

Initial analysis suggests **digital solutions** may be appropriate for many formal review steps, corresponding to a total of ~**460 hours**²

Source: Site plan review document analysis (May-Jun 2023)

1. Based on analysis of 29 site plan review documents; review documents not applicable for the Law and Communications & Technology Management departments

2. Average of hours across steps

3. Excluding high-level code references such as "COA, UPC"

4. Metric themes are possible groupings of metric items that could be related to each other

3A. Assessment of overlapping regulations and metrics may guide focus for next steps¹

47

sections / codes referenced by 2+ specialties

Example overlapping sections / codes²

LDC⁴ 25-1: General Requirements and Procedures – (10) AW Plumbing, DSD EV, DSD Tree, DSD DWQ, DSD SP, TPW, Parks & Rec., Watershed (Floodplain), Housing, Planning HP

LDC 25-2: Zoning – (6) Planning (UDD), Planning HP, TPW, DSD Site Plan, Housing, DSD EV

DCM⁵ 1-2-2: Drainage – (3) Watershed (RSMP), Watershed (Floodplain), DSD DWQ

LDC 25-5-1: Site Plan Required – (3) AW Industrial Waste, DSD Site Plan, TPW

LDC 25-7-1: Drainage – (3) Watershed (RSMP), Watershed (Floodplain), DSD DWQ

LDC 25-7-61: Criteria for approval of development applications – (3) Watershed (Floodplain), DSD EV, DSD DWQ

LDC 25-2-E: Design Standards & Mixed-Use – (2) TPW, DSD Site Plan

90

Details follow

metric themes reviewed by 2+ specialties

Example overlapping metric themes³

Access – (10) Planning (UDD), AE Transmission Eng., AE Distribution Design, AE Substation Eng., AE Transmission Construction, Fire, TPW, DSD EV, AULCC, DSD DWQ

Utilities – (9) AW Industrial Waste, AW CIP, Planning (UDD), AE Chilled Water, Fire, TPW, DSD EV, DSD Tree, DSD SP

Grading – (8) AW Facilities Eng., Urban Planning, AE Transmission Eng., AE Substation Eng., Watershed, DSD Tree, DSD EV, Watershed (Floodplain)

Pipes – (8) AW Industrial Waste, AW Plumbing, AW Facilities Eng., AW CIP, AE Chilled Water, Fire, DSD DWQ, DSD SP

Driveways – (7) AE Pole Attachments, Fire, TPW, AULCC, DSD EV, DSD DWQ, DSD SP

Easements – (7) AW Facilities Eng., AW CIP, AE Transmission Eng., AE Distribution Design, Fire, Watershed (Floodplain), DSD DWQ

Insights

- 29 metric themes reviewed by 4+ specialties across different departments
- **Austin Energy** has at least one specialty in each of the 6 most overlapping metric themes
- Overlap may guide focus for **inter- or intra-departmental problem-solving meetings** (e.g., access or utilities between 9+ specialties)

Source: Site plan review document analysis (May-Jun 2023)

1. Based on analysis of 29 site plan review documents; review documents not applicable for the Law and Communications & Technology departments

2. Excluding high-level code references such as "COA, UPC"

3. Metric themes are possible groupings of metric items that could be related to each other

4. LDC: Land Development Code

5. DCM: Drainage Criteria Manual

Details in appendix

3A. Identifying overlapping regulations and metrics offers an opportunity to improve collaboration

Deep dive on sample of overlapping regulations & metric themes¹

Sample overlapping sections/codes and metric themes



Sections/codes

- **LDC 25-2-E**
 - Both departments were unaware of other's review of the same code; uncertain of impact
 - Departments were scheduling another meeting to understand reviews and determine impact

Metric themes

- **Access**
 - Applicant-driven problem resolution across conflicting departments puts the departments in reactionary positions
 - Applicants could choose to go “forum shopping” and determine approach for completion
- **Utilities**
 - Review requires significant internal coordination (e.g., AFD to coordinate with AW IW for how cleanout is proposed)
 - ~9 coordination efforts referenced in the meeting

Source: Site plan review document analysis (May-Jun 2023)

Source: Discussions and interviews with DSD and partner departments (6/06)

1. Metric themes are possible groupings of metric items that could be related to each other

Insights

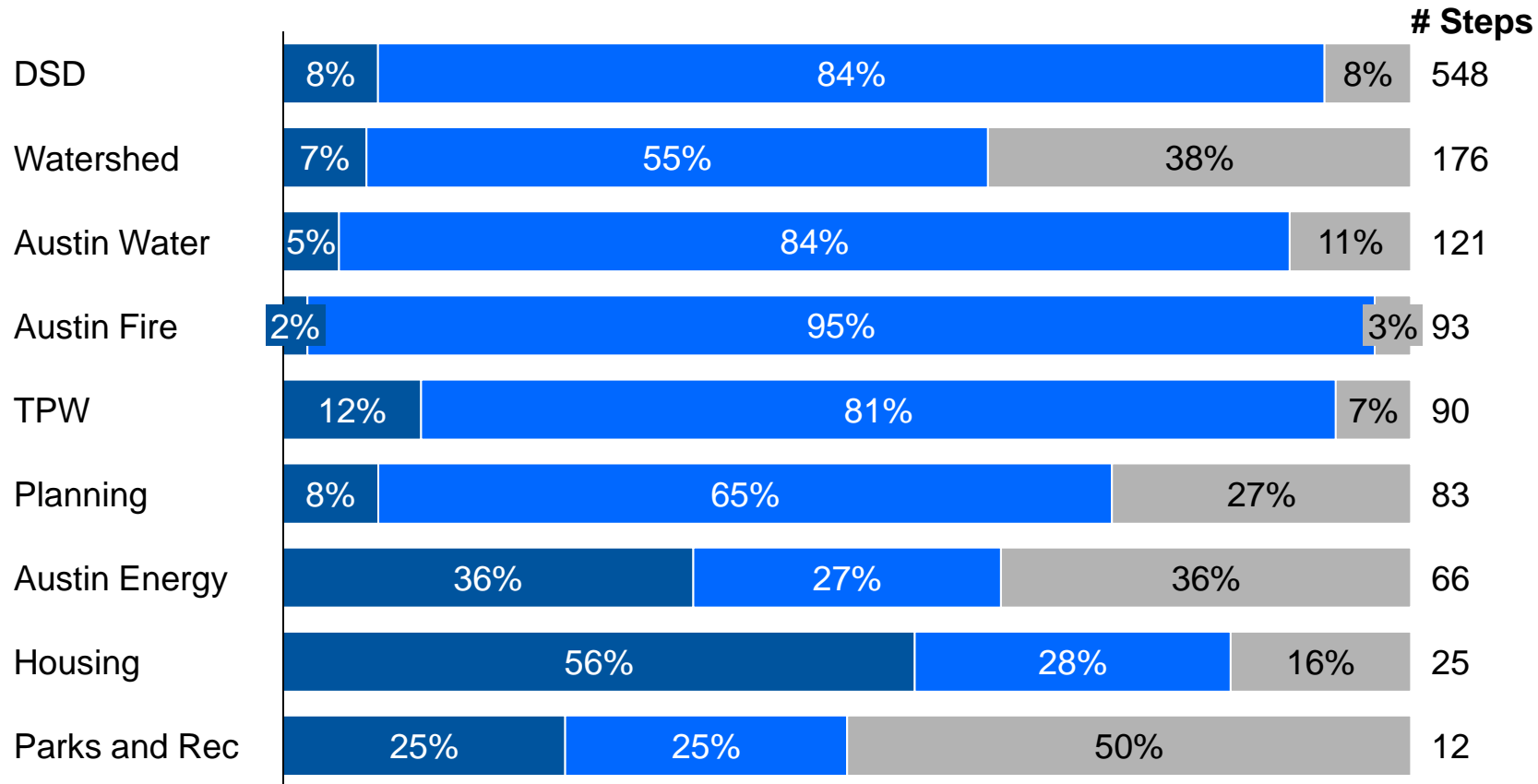
- Follow-up conversations could be scheduled to review for potential:
 - **Code conflicts**
 - **Interpretation** misalignment
 - **Situational conflicts** (application dependent)
- Proactive coordination amongst departments may **mitigate recurring issues** and could be used to **align upon a formal department review order** by metric

3B. Initial analysis suggests digital solutions may be appropriate for many formal review steps

Department formal review steps by analysis type¹

N = 1,214 total steps²

Quantitative³ } Digital solutions possible
Boolean⁴ }
Expert interpretation⁵



Insights

- Initial analysis suggests ~**85%** of formal review steps in the **top 5 departments** may be considered for automation or other digital solutions¹

Source: Site plan review document analysis (May-Jun 2023)

1. Based on analysis of 29 site plan review documents; review documents not applicable for the Law and Communications & Technology departments

2. 1,214 steps in total, which excludes steps where no "analysis type" data was provided

3. Quantitative involve mathematical calculations or estimations (e.g., "floor to area ratio less than .5")

4. Boolean involve determination of binary outcomes (e.g., yes/no; true/false, compliant/non-compliant)

5. Expert interpretation involves qualitative judgment (e.g., "does the site plan match the character of the neighborhood?")

3B. Current internal technology does not meet all desired future-state capabilities

Tool contains capability

No existing tech tool coverage

Potential future state capabilities

Work management & communication

Document mgmt. & review

Cust. integ.

Reports & analytics

Perf. mgmt.

Tool	Description	Depts using	Workflow mgmt.	Task mgmt.	Work delegation	Communication (internal)	Digital signature	Document mgmt. / version control	Manual code review	Digital CC (doc. verification)	Digitized formal review/fee calc.	GIS (Integration)	Cust. portal integration	CRM integration	Report generation	Analytics (cycle time/code tracking)	Data visualization	Performance mgmt. (Individual)	Performance mgmt. (Management)
Amanda	CoA internal process mgmt. tool	10																	
Enterprise GIS	CoA geographic info. system	5																	
Freshdesk	Ticketing/communication system	1																	
Bluebeam	Site plan review/markup tool	5																	
Smartsheet	Task mgmt. tool	2																	
Network drives	File storage	3																	
MS Outlook	Email platform for customer communication	All																	
MS Teams	Workplace communication platform	All																	
MS Word	Text editing program	All																	
Knack	Intra-department plan review platform	1																	
File maker	Fee calculation software	1																	
PowerBI	Data visualization tool	3																	
Formstack	Workplace productivity tool	1																	
Microstrategy	Data visualization tool	3																	

3B. Current external-facing technology does not meet all desired future-state capabilities¹

			Potential future state capabilities				Account management		Customer experience							Tech support				
Tool	Description	Depts using	Document mgmt.	Fee calculation	Reporting	Integration with source of record	Data visualization	Progress tracking	Real-time data	Communication, messaging, notes	Self-service portal	Custom forms	Fee payment	App. submission	Knowledge base	Live chat	Email support	Phone support	Support ticketing	
AB+C	Customer-facing status tool (Amanda)	1																		
Jotform	Web-based app. submission tool	1																		
Freshdesk	Ticketing/communication sys.	1																		
Freshchat	Chat-support	1																		

Source: Discussions and interviews with DSD and partner departments (Apr-Jun 2023)

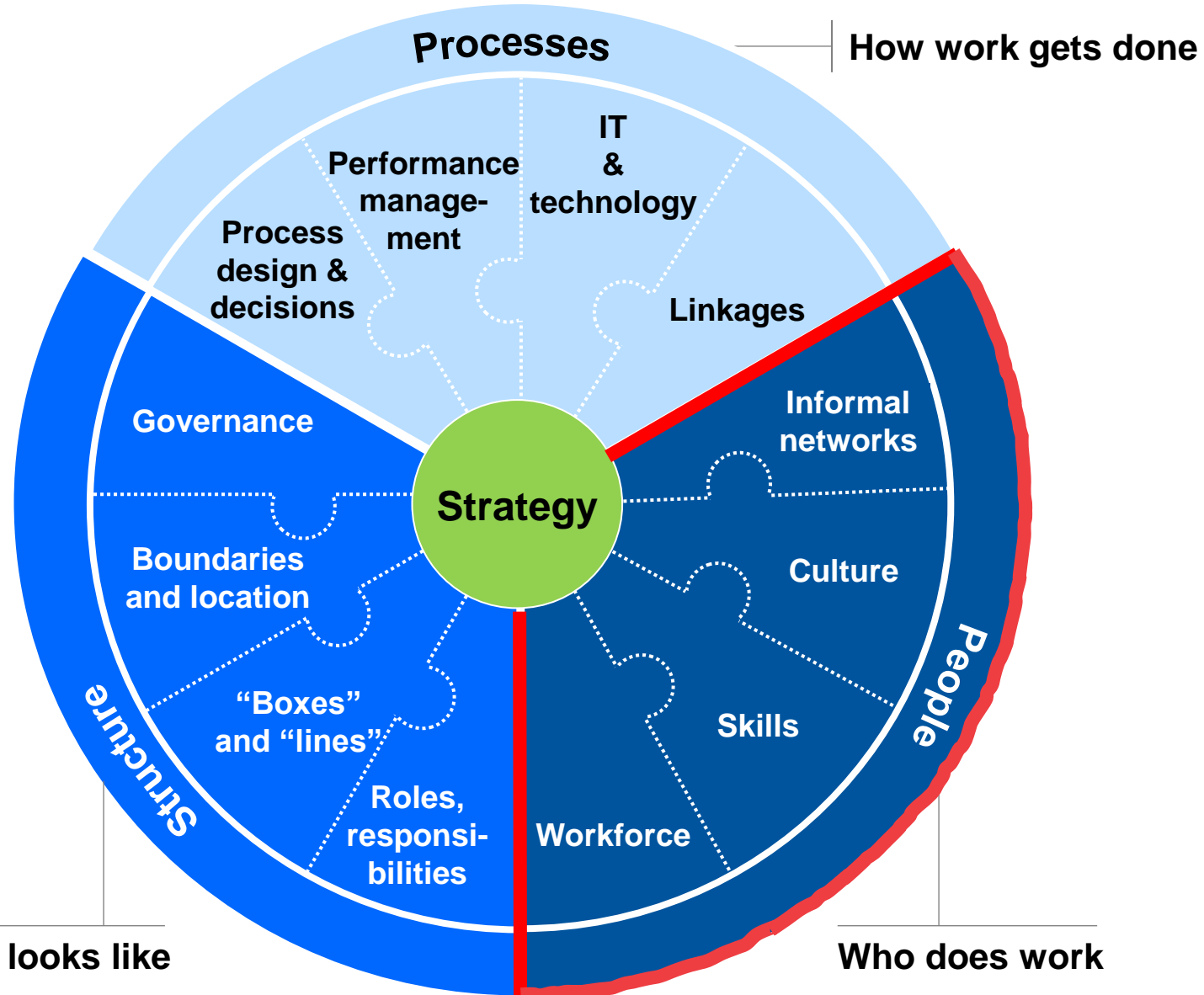
1. Includes process facilitation software only. Mandated design software (CAD, PondPack, etc.) not included.

2. Logic based workflow v2 capability enabled March 2023.



4. People

A holistic approach to organization design dramatically increases the probability of success



● Focus for this section

Considerations

External research based on **survey of 1,200+ executives** shows...

- Redesigns often fail to deliver; **only ~30% of redesign efforts succeeded**
- However, a **structured approach** that pulls the full set of organizational levers has a **success rate of 86%**

4. 250+ staff with increasing attrition and limited training programs contribute to challenges

● Details follow



A. Culture

- **Compliance-focused mentality** views negative customer feedback as an inherent outcome
- **“Us vs. them” mindset** (DSD vs. partner departments and between partner departments)
- Some staff feel **unempowered** to make decisions
- Some staff feel a **slow process “protects”** the public



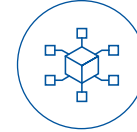
B. Workforce

- **250+ people** involved in the site plan process across 11 departments and 41 specialties
- **Increasing attrition** coupled with **low average tenure** for current positions



C. Talent & skills

- Staff rate “training in and applying **root cause problem solving**” as the 2nd lowest operational excellence factor
- Staff rate “teams have **onboarding and development plans**, including individual coaching” as the 5th lowest operational excellence factor
- Challenges developing and retaining **technical expertise**



D. Informal networks

- **Complex organization structure** spanning 11 departments involved in site plan process
- Variety of physical locations and increasing turnover **reduce the ability to build relationships** internally and with customers

4A. Current culture inhibits a one-team and performance-focused approach



Compliance focused

- “” *The applicants and City staff are talking past each other. Staff is frustrated they don't have all the required info to make interpretations and applicants are frustrated they aren't being told consistently how to correct their plans for compliance.*
- “” *We have different goals, but both sides are frustrated*
- “” *Difficult to achieve total satisfaction with so many conflicting priorities*



Us vs them mentality

- “” *One of us has to give up something*
- “” *Why is tree [review] in DSD? If they're focused on customer service, leave it to Watershed*
- “” *Not every city department has benefit of IT*
- “” *Fire and watershed inherently have to clash with each other*














Unempowered staff

- “” *Work just keeps coming; people are exhausted, overwhelmed, and under appreciated; everyday is a constant reprioritization of priorities*
- “” *Scared, angry, confused and similar emotions are expected when a system is overly complex, opaque, and not aligned with One City Voice.*
- “” *Front line staff feel powerless*

4B. 41 specialties, 250+ people, and ~4,150 weekly hours are involved in site plan process

Site plan process involvement by department¹

Department	Specialties / disciplines (#) ²	Staff (#)	Staff time spent (Avg. %)	Dept. time spent (Weekly hrs.)
 DSD	6	53	~65%	~1,395 hours
 Water	8	34	~55%	~755 hours
 Public Works & Transportation	3	56	~30%	~700 hours
 Energy	12	51	~25%	~545 hours
 Watershed protection	3	25	~30%	~315 hours
 Fire	1	16	~20%	~130 hours
 Communications & Technology	2	8	~35%	~120 hours
 Parks & Recreation	1	5	~40%	~80 hours
 Law	2	4	~45%	~75 hours
 Planning	2	4	~25%	~40 hours
 Housing	1	2	~20%	~15 hours

Source: Discussions and interviews with DSD and partner departments (Apr–Jun 2023)

1. Personnel who are involved 5%+ of the time within the site plan permitting process

2. Specialties / disciplines are sub-groups of a department; not all departments have specialties

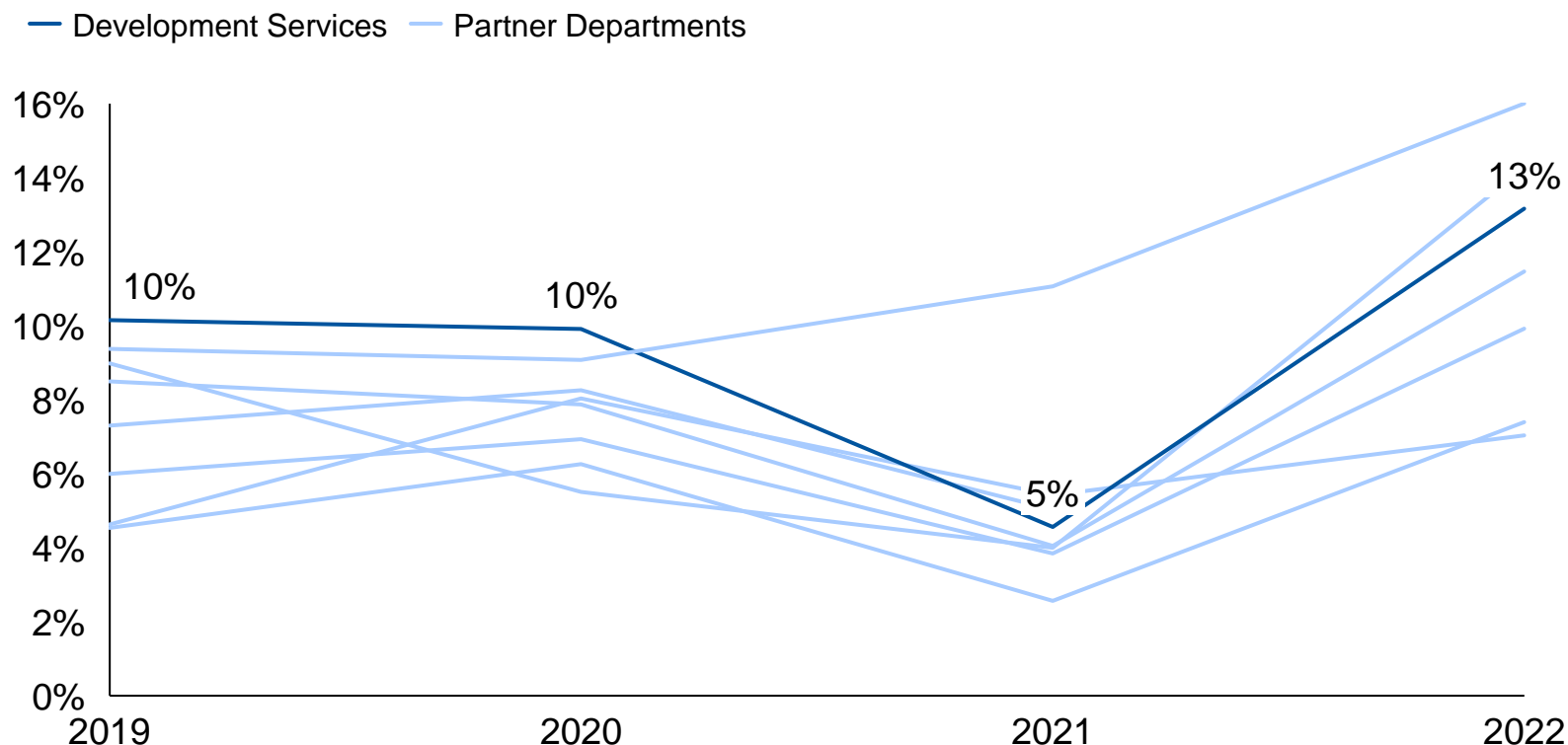
Insights

- **250+ staff** involved in the site plan process (e.g., reviewing applications or supporting documents, meeting with customers, leading teams)
- Individual involvement varies from 5%-100%; **staff self-report an average ~40%** of time spent on the site plan process
- Identifying personnel was a challenge due to a **lack of an updated organization chart** across all departments

4B. Turnover compounds impacts of a long learning curve

Annual attrition rate of all staff in selected departments¹, 2019-2022

N = 8 departments



~1.8 year

average tenure at DSD in current role for site-plan-related staff²

1-1.5 year

average learning curve for reviewers³

Source: <https://data.austintexas.gov/>, Data from DSD, Amanda data as of 5/15/2023

1. Annual attrition represents the departments overall, not just for site plan involvement; includes DSD, Energy, Fire, Transportation, Water, Communications & Technology Management, Law, and Parks & Recreation

2. Represents all 53 DSD staff members who allocate a minimum of 5% of their time specifically to the site plan process

3. Discussions and interviews with DSD and partner departments (Apr-Jun 2023)

4C. Operational excellence: Survey and panels provided perspective on skills

Diagnostic of maturity, strengths, and opportunities



Staff survey

Format: Online survey

Participants: 154 staff¹ (DSD + Partner Departments)

Highlights:

- Overall, respondents indicated **moderate to strong ratings for Purpose & Strategy**
- Respondents were **more critical on Operating Procedures and Technology**
- **Non-director roles** (application reviewers, supervisors, and managers) provided relatively **consistent responses**

Source: Operational Excellence survey results (May 2023) and Operational Excellence panel interviews (May 2023)

1. Excludes respondents who self-reported working 0 hours per week on the site plan review process



Details follow



Panel interview

Format: Facilitated panel interview

Participants: 25+ staff (DSD + Partner Departments)

Highlights:

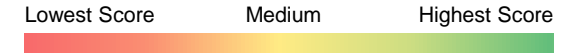
- What is working well...
 - Emphasis on being good stewards
 - Continuous learning opportunities
- What can be improved...
 - Establish standards of collaboration within DSD and with partner departments to identify and communicate potential LDC overlap
 - Adopt methods for root cause problem solving to codify and share lessons learned
 - Improve flexibility of technical tools



4C. Operational excellence survey: Problem solving and pivoting quickly with technology are perceived opportunities

Operational excellence ratings

Scores ranging 1 (low) to 4 (high), N = 154¹



Elements	Description	Average
Purpose and strategy	See customer feedback and adjust work accordingly	2.54
	Know how work connects to the long-term vision	2.91
	Teams use a range of performance goals	2.66
Principles and behaviors	Leaders role model effective coaching	2.58
	Teams have fun/engaging ways to formally recognize each other	2.54
	Leaders have regular visits to work areas and provide support	3.23
Management system	I often work with cross functional teams to make improvements	2.76
	Teams have structured recurring check-ins to review performance	2.63
	Teams have onboarding and development plans, incl. individual coaching	2.53
	Team documents and regularly updates procedures and standard work	3.06
	We have the time and resources to pursue continuous improvement	2.61
Operating procedures	Utilize detailed visual plans to align responsibilities and balance workload	2.29
	Easy to interpret, detailed visuals to help identify performance gaps	2.29
	Staff are trained in and routinely apply root cause problem solving	2.01
Technology	Digital and analytical tools are implemented	2.93
	Use iterative approaches to pivot quickly when adapting strategies	1.95

4C. Staff report inconsistent practices limiting operational excellence across departments

Operational excellence survey ratings by department

■ Perceived Strength
 ■ Perceived Opportunities

 Lowest score Medium Highest score

Scores ranging 1 to 4, N = 154¹

Elements	Description	Department # of respondents	DSD 50	Water 24	TPW 18	Water- shed 16	Energy 14	Fire 13	Other ² 19	Average
Purpose and strategy	See customer feedback and adjust work accordingly		2.53	2.43	2.56	2.13	2.38	2.46	3.21	2.54
	Know how work connects to the long-term vision		2.83	3.04	2.44	3.00	3.15	2.67	3.53	2.91
	Teams use a range of performance goals		2.60	2.91	2.00	2.53	3.00	2.67	3.29	2.66
Principles and behaviors	Leaders role model effective coaching		2.84	2.79	2.38	2.27	2.29	1.85	2.57	2.58
	Teams have fun/engaging ways to formally recognize each other		2.94	2.67	2.33	2.27	2.36	1.62	2.61	2.54
	Leaders have regular visits to work areas and provide support		3.38	3.46	2.67	3.25	3.57	2.77	2.93	3.23
Management system	I often work with cross functional teams to make improvements		2.64	3.00	2.83	2.87	2.86	1.92	3.13	2.76
	Teams have structured recurring check-ins to review performance		2.57	2.63	2.35	2.53	3.00	2.23	3.19	2.63
	Teams have onboarding and development plans, incl. individual coaching		2.55	2.87	2.47	2.00	2.42	2.31	3.04	2.53
	Team documents and regularly updates procedures and standard work		3.26	3.04	2.82	2.54	3.36	2.36	3.27	3.06
	We have the time and resources to pursue continuous improvement		2.66	2.87	2.39	2.63	2.46	1.83	3.03	2.61
Operating procedures	Utilize detailed visual plans to align responsibilities and balance workload		2.36	2.43	1.94	2.25	2.00	2.31	2.65	2.29
	Easy to interpret, detailed visuals to help identify performance gaps		2.28	2.60	2.25	1.93	2.00	2.33	2.48	2.29
	Staff are trained in and routinely apply root cause problem solving		1.89	2.17	1.59	1.88	1.79	1.85	3.09	2.01
Technology	Digital and analytical tools are implemented		2.70	3.38	2.60	3.17	2.85	2.44	3.23	2.93
	Use iterative approaches to pivot quickly when adapting strategies		1.80	2.29	2.00	1.73	2.00	1.60	2.08	1.95
Average			2.64	2.80	2.36	2.44	2.61	2.22	2.93	

Source: Operational Excellence survey results (May 2023) and Operational Excellence panel interviews (May 2023)

1. Excluding those who self-reported working 0 hours per week on the site plan review process

2. Comms & Tech management, Parks & recreation, Planning, Law, and Housing

4C. Department leaders tend to have higher perceptions of operational excellence elements than their staffs

Operational excellence survey ratings by role

Scores ranging 1 to 4, N = 154¹

		Perceived Strength		Perceived Opportunities		Lowest score Medium Highest score		
Elements	Description	Role # of respondents	Reviewer 100	Supervisor 26	Manager 23	Director 5	Average	
Purpose and strategy	See customer feedback and adjust work accordingly		2.36	2.64	2.96	3.40	2.54	
	Know how work connects to the long-term vision		2.86	2.69	3.17	3.80	2.91	
	Teams use a range of performance goals		2.57	2.65	2.78	3.80	2.66	
Principles and behaviors	Leaders role model effective coaching		2.59	2.50	2.50	3.20	2.58	
	Teams have fun/engaging ways to formally recognize each other		2.48	2.46	2.65	3.40	2.54	
	Leaders have regular visits to work areas and provide support		3.27	3.23	2.91	3.80	3.23	
Management system	I often work with cross functional teams to make improvements		2.50	2.88	3.39	4.00	2.76	
	Teams have structured recurring check-ins to review performance		2.49	2.85	2.83	3.20	2.63	
	Teams have onboarding and development plans, incl. individual coaching		2.25	3.00	2.87	3.60	2.53	
	Team documents and regularly updates procedures and standard work		3.06	3.08	2.96	3.50	3.06	
	We have the time and resources to pursue continuous improvement		2.64	2.56	2.48	2.75	2.61	
Operating procedures	Utilize detailed visual plans to align responsibilities and balance workload		2.20	2.46	2.41	2.75	2.29	
	Easy to interpret, detailed visuals to help identify performance gaps		2.32	2.13	2.33	2.25	2.29	
	Staff are trained in and routinely apply root cause problem solving		1.98	2.16	1.83	2.60	2.01	
Technology	Digital and analytical tools are implemented		2.84	2.92	3.25	3.00	2.93	
	Use iterative approaches to pivot quickly when adapting strategies		1.88	2.18	2.08	1.50	1.95	
Average			2.53	2.66	2.73	3.20		

Source: Operational Excellence survey results (May 2023) and Operational Excellence panel interviews (May 2023)

1. Excluding those who self-reported working 0 hours per week on the site plan review process



5. Structure

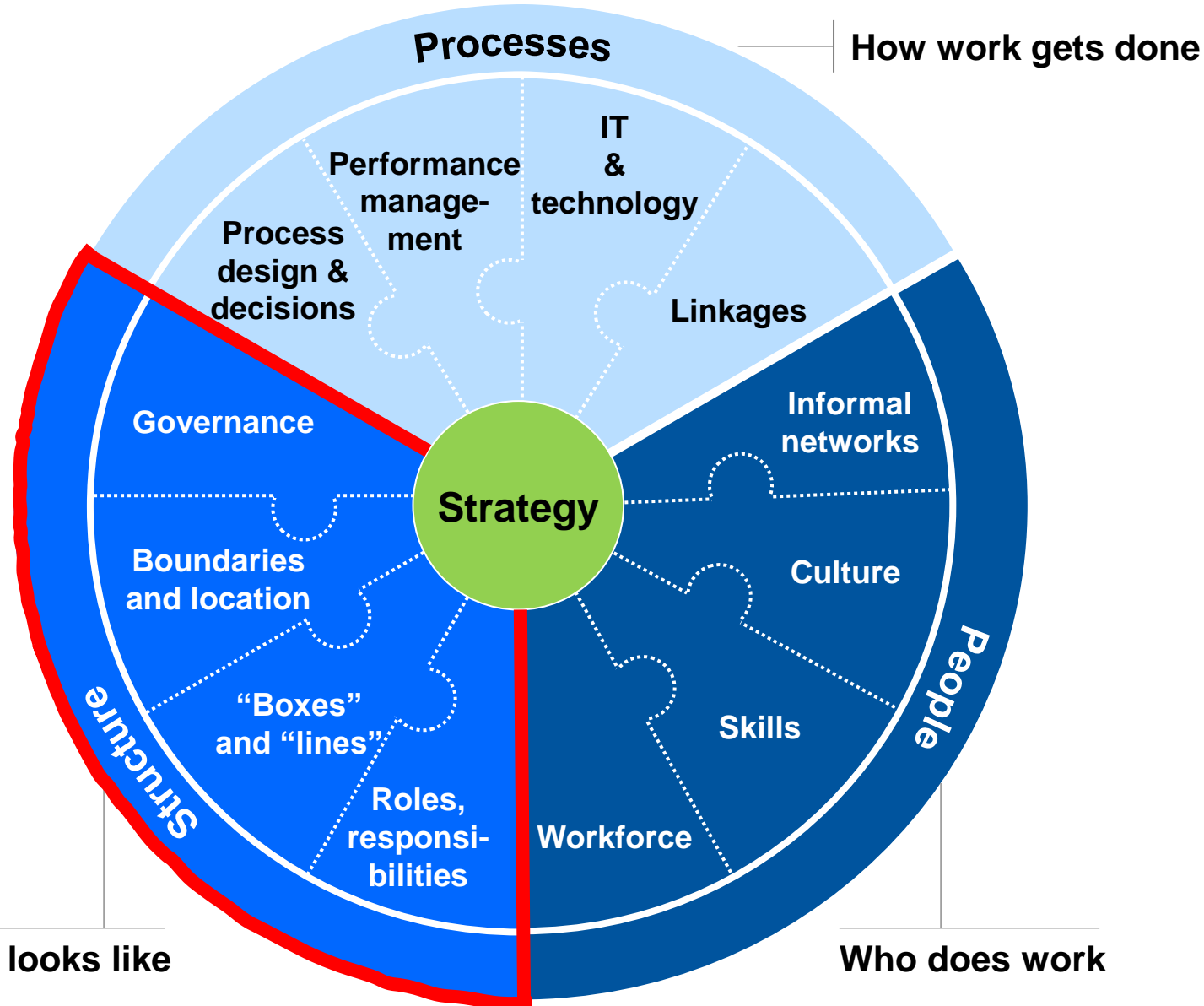
A holistic approach to organization design dramatically increases the probability of success

 Focus for this section

Considerations

External research based on **survey of 1,200+ executives** shows...

- Redesigns often fail to deliver; **only ~30% of redesign efforts succeeded**
- However, a **structured approach** that pulls the full set of organizational levers has a **success rate of 86%**

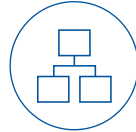


5. Lack of clear roles & responsibilities, governance, and co-location practices inhibit effectiveness



A. Roles & responsibilities

- **No role clarity** with fragmented responsibilities and ever-changing priorities
- For those involved in site plan review, **57% of DSD staff spend >80%** of their time in the process relative to **7%** for **partner departments**



B. “Boxes” and “lines”

- **Unclear inter-departmental governance**
- **High volume of handoffs** due to 41 specialties across the process
- **Resistance from some partner department staff** for centralizing within DSD



C. Boundaries & location

- **Co-location in theory** but not consistently in practice
- **Lack of physical proximity** between departments



D. Governance

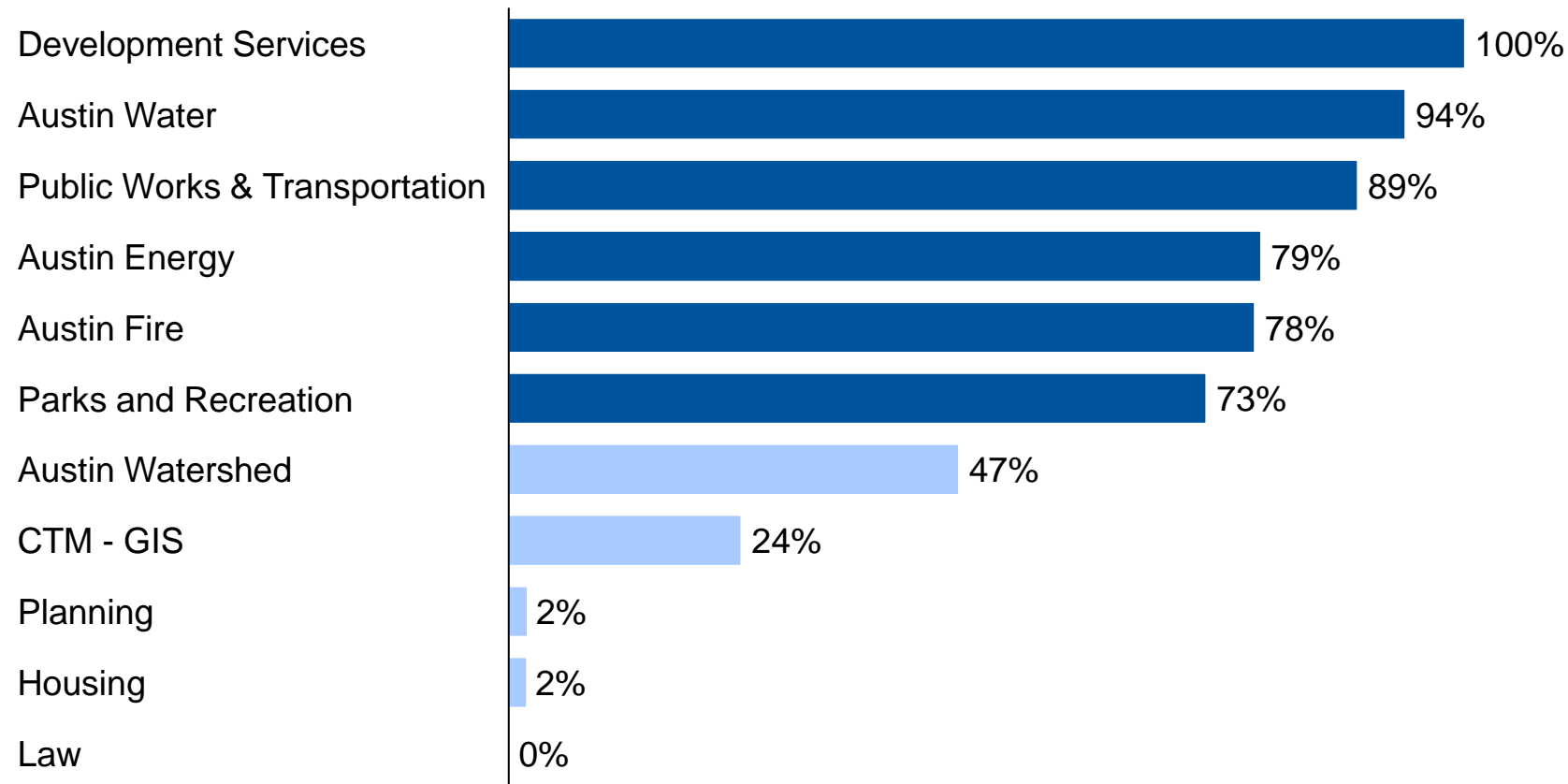
- **Ad hoc cross-department coordination** and prioritization
- **Limited visibility** into critical path to effectively prioritize workload

5A. Top 6 departments involved in the site plan process review 70%+ of all site plan applications

Applications reviewed by department

% of applications, N = 1,187 applications

■ Top 6 reviewing departments



Insights

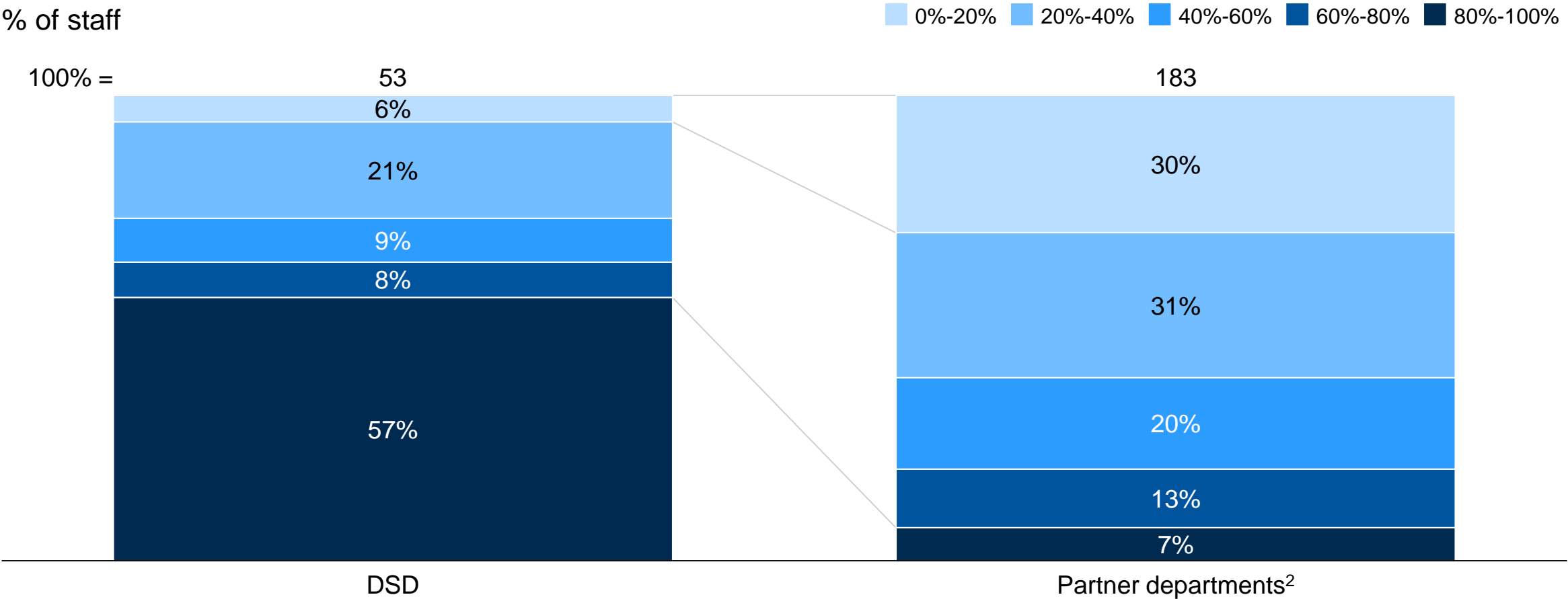
- **DSD, Water, and Public Works & Transportation** each review ~90%+ of all site plan applications
- **Law¹** is not assigned as a process in Amanda, causing lack of transparency in their status

Source: '22-'23 Amanda process assignments data (as of 5/15/23)

1. Law is not assigned as a process in Amanda, but is heavily involved in applications at end of formal review / beginning of permit issuance

5A. DSD staff focus more time on the site plan process than partner departments staff members





Approximate percent of time spent on site plan process weekly, by staff member¹



Source: Discussions and interviews with DSD and partner departments (Apr-Jun 2023)
1. Represents 236 of 258 staff involved in site plan process for whom data is available.
2. All partner departments including Water, TPW, Energy, Fire, Parks & Rec, Watershed, CTM – GIS, Planning, Housing, and Law

6. Potential approach

6. Achieving the City's objectives could involve a comprehensive transformation

Design element	From	To
 Strategy	Siloed priorities and approaches across 11 departments...	Shared direction and “one team” mindset and practices
 Processes Process design	Highly complex, inconsistent, opaque, and hard to navigate... Numerous hand-offs across siloed organizations without documented “standard work,” common interpretations, or procedures	Customer-back design for consistency, transparency, and ease Streamlined processes with documented “standard work” and team continuously improving them as requirements evolve
Performance management	Inconsistent approaches to tracking performance and using data within and across departments	Standard approaches to KPI definition and tracking to enable root cause problem solving and continuous improvement across end-to-end process
IT & digital	Outdated and fragmented IT systems with proliferation of “shadow” functions with ad hoc — sometimes manual — work-arounds	AI-enabled digital “single source of truth,” workflow / decision-support, and customer relationship management to improve productivity
Linkages	Ad hoc, inconsistent, and ill-defined coordination across departments	Deliberate use of “integrator roles” and formalized coordination to synchronize across teams and provide seamless customer experience
 People Culture	20th-century government approach under strain... Compliance-focused, “us versus them,” and disempowered...	21st-century, competitive staff value proposition “Partner” and customer-driven, one team, and empowered to improve
Workforce	250+ staff from 11 departments with different skills and priorities...	Right-sized capacity across departments with common purpose
Skills	Technical expertise strained by turnover, lack of apprenticeship, and personality-based management...	Celebrating specialization with commitment to professional development and shared approach to continuous improvement
Informal networks	Networks weakened by retirements, turnover, and fragmentation...	Cultivated communities of practice within and across departments
 Structure Roles & responsibilities Governance	Fragmented, siloed, and rigid... Uncertain role clarity, diffuse accountability, and limited customer focus	Flexible but integrated structure Clearly defined roles and responsibilities for critical processes
Location	Co-location in theory but not yet consistently in practice	Leveraging full potential of hybrid work and co-location of all teams
Lines & boxes	Unclear interdepartmental governance	Consider adjustments to formal reporting (including “dotted line”) and organizational structure to improve effectiveness and efficiency

6. Initiatives across the organizational model could be considered to improve performance



Strategy

- Align all departments on a **common vision, mission, and set of values**
- Establish a **common definition of the “primary customer”**



Processes

- **Standardize inconsistent process** activities
- Formalize **code / regulation & metric management**
- **Enhance and centralize performance management** and KPI tracking
- Upgrade **internal / external system** / platform of record
- **Automate end-to-end site plan activities**
- Establish a cadence of inter- and intra-departmental meetings to prioritize **continuous improvement**



People

- Mobilize around key actions to shift **mindsets and behaviors**
- Establish a gold standard **training program**
- **Align staff incentives** with process goals
- Optimize **hiring methodology**
- Consider **contractors / temporary staff** for site plan reviews during periods of high volume



Structure

- Assess organization design and roles / responsibilities, considering **physical location** of departments and staff

6. DSD, partner departments, and applicants collaborated to identify 41 initial potential initiatives

■ Potential quick wins

Critical enablers	Quality of experience		Speed of the process	
Initiatives that enable other initiatives	Initiatives designed to enhance experience of staff and applicants		Initiatives that facilitate faster process execution	
<ol style="list-style-type: none"> Establish gold standard training ground Align Site Plan reviewers on their primary mission and customer Staff incentives aligned with process goals Evaluate organization design Cadenced inter and intra departmental meetings to discuss continuous improvement Enhanced centralized process around KPIs within and across departments Determine and map overlapping codes/regulations and metrics Rationalize / refine / consolidate code criteria manual(s) and publicize interpretation(s) Enhance & ensure consistent use of internal system of record 	<ol style="list-style-type: none"> Optimize hiring methodology Rationalize fee schedule Implement customer service best practices (e.g., turn camera/video on, accessibility) Consolidated review team for completeness check Empower the case manager and ensure consistency in case manager assignments Formalize and publish permit signing order Recalibrate completeness check Improve Master Comment Report format Prioritize application by tiers 	<ol style="list-style-type: none"> Formalize "re-review" process if/when department reviewers change Improve internal and external conflict resolution process Formalize approach around LDC additions/changes Enhance application wizard (questionnaire) that exists as part of the City of Austin website Application training resources Implement applicant attestation of Site Plan completeness and accuracy upon intake Cadenced inter and intra departmental meetings to discuss ongoing applications Enhance customer facing portal Automate fee calculation and posting 	<ol style="list-style-type: none"> Contractors/ temps for site plan reviews Standardize site plan formal review activities Formalize pre-submission meetings Formalize post-first review cycle meetings Scheduling (office hours/rotating customer meetings days) Provide rolling draft comments to applicant Applicant ability to self-certify (w/potential fee) Enhance application wizard (questionnaire) that is linked and a part of the site plan application process Automate required documents at submission Digitize signature process Automate/ integrate application entry to system of record CRM system to auto-capture communications AI digitized completeness check AI digitized formal review 	

6. An initial portfolio of 41 initiatives is prioritized by ease of implementation, time horizon, and impact

Portfolio of initiatives mapped by ease of implementation and time to realize impact

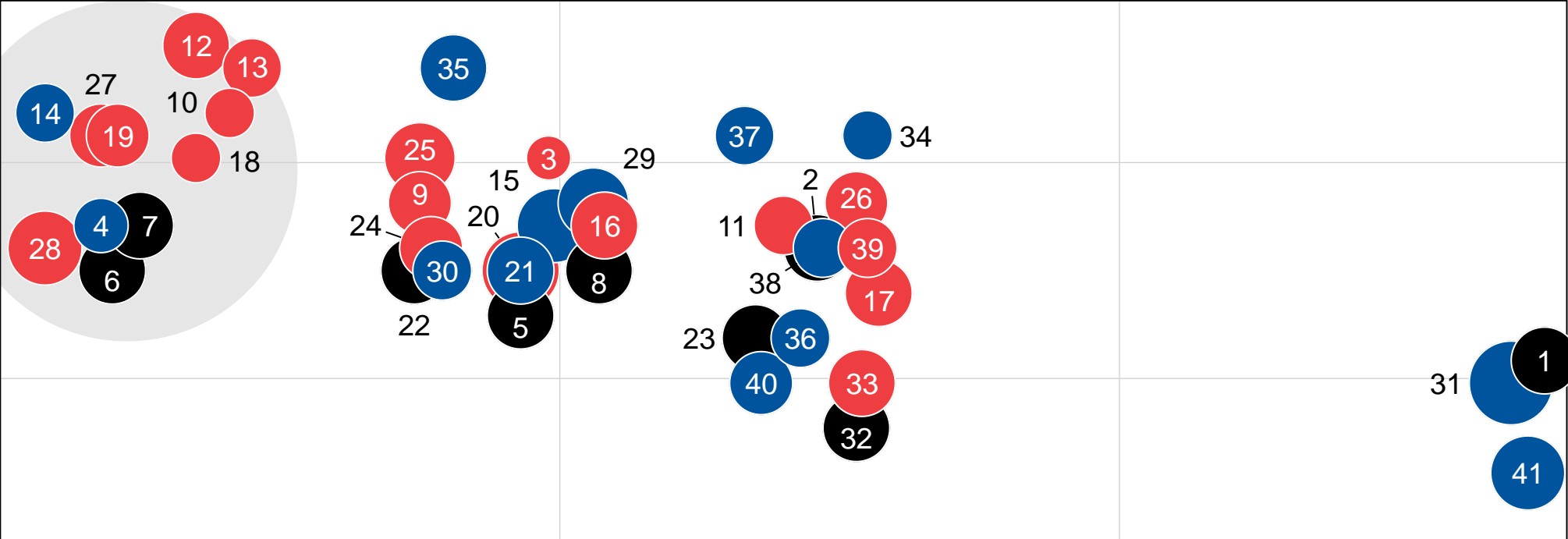
N = 41 initiatives

Ease of implementation¹

High
“We can do this now”

Medium
“We should be able to do this”

Low
“We need a sustained, heavy lift”



quick wins Less than 3 months Near-term 3 months-1 years Intermediate-term 1-2 years Medium-term 2-3 years Long-term 3+ years

Time to realize impact



Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)
1. Ease of implementation reflects index between experience, complexity, resourcing and regulatory factors

Details in appendix

6. The City could build momentum across three implementation horizons – preliminary perspective



Details to follow

	 Design and launch Present – Dec 2023	 Build momentum Jan 2024 – Dec 2024	Scale transformation Jan 2025 →
Strategy	<ul style="list-style-type: none"> Departments convened and aligned on shared vision, priorities, and collaboration 	<ul style="list-style-type: none"> Team “takes stock” of strategic priorities and approach, adapting as needed 	<ul style="list-style-type: none"> Team assesses progress and lessons learned to adapt and raise aspirations
People	<ul style="list-style-type: none"> Initial initiatives launched to build continuous improvement culture, talent (skills and capacity; recruiting), and communities of practices to show to workforce “new ways of working” 	<ul style="list-style-type: none"> Second wave of initiatives launched – moving from DSD to across departments Staff Value Proposition and org. health (including CX expectations) redefined 	<ul style="list-style-type: none"> New talent model and culture locked in across system through skills, capabilities, and new ways of working (e.g., continuous improvement approach; individual performance mgmt.)
Processes	<ul style="list-style-type: none"> “Quick win” process initiatives adopted in DSD and partner department New approach to org. performance mgmt. of end-to-end process (e.g., KPIs, senior leader meetings) launched across depts. Future-state IT capabilities designed and procured Other process improvements designed 	<ul style="list-style-type: none"> Prioritized process improvement initiatives launched with new process maps and SOPs Cross-department continuous improvement program piloted and then rolled out IT solutions implemented with staff trained on new tools 	<ul style="list-style-type: none"> Cross-department team operates as one-team across process and informed by standard KPIs and practices Teams practice continuous improvement as norm New IT system dynamically retooled to adopt the latest capabilities (e.g., Generative AI)
Structure	<ul style="list-style-type: none"> Cross-departmental governance structure and cadence established Roles, responsibilities, and accountabilities for end-to-end process reviewed and codified Staff duties, and potentially reporting relationships, assessed and refined 	<ul style="list-style-type: none"> Cross-departmental policies, including criteria manuals, reconciled, and process to update established Updates to roles and responsibilities integrated into role descriptions, annual performance goals, etc. 	<ul style="list-style-type: none"> Governance structure and cadence is adjusted to meet post-design and implementation needs Refinements made based on practical experience with future-state design

6. Potential “foundations” could be established in next 6 months

Internal City of Austin management improvements

- Empower DSD to lead, coordinate, convene, and report progress on overall process and improvements
- Prioritize cross-departmental portfolio of initiatives – with specific tactical “quick wins”
- Define and begin tracking cross-departmental KPIs
- Establish regular leadership team management cadence to drive alignment and continuous improvement
- Develop and provide standard customer experience expectations to all staff and incorporate into performance review standards
- Co-design new end-to-end process with partner departments, identify sequence of tactical improvements, and begin implementation to deliver visible impact
- Introduce leadership and staff to foundational continuous improvement skills (e.g., “white belt”; know your customer; root cause analysis)
- Define IT system requirements and launch procurement
- Establish project management team for overall effort

External customer experience improvements

- Publish new guidelines to applicants on “do’s” and “don’ts” and “what good looks like” for plans
- Pilot new pre-submission review meeting for certain categories of plans to identify preemptively potential complexities or bottlenecks
- Design and pilot empowered end-to-end Case Manager role to be responsible for tracking plan, identifying bottlenecks, and escalating for solutions
- Pilot web-based “pizza tracker” for application status updates
- Fully execute co-location through design and pilot of Version 1.0 in-person “one-stop-shop” assistance office
- Expand paralegal capacity and publish clear signature protocols to accelerate permit issuance post-review
- Establish stakeholder advisory council to meet every 8 weeks to provide feedback, problem solve, etc.
- Ensure staff is easy to access and attentive (e.g., contact and phone numbers are accessible and video cameras on)



Appendix

Table of contents

Customer experience	68
Strategy	79
Processes	83
People	105
Potential approach	108

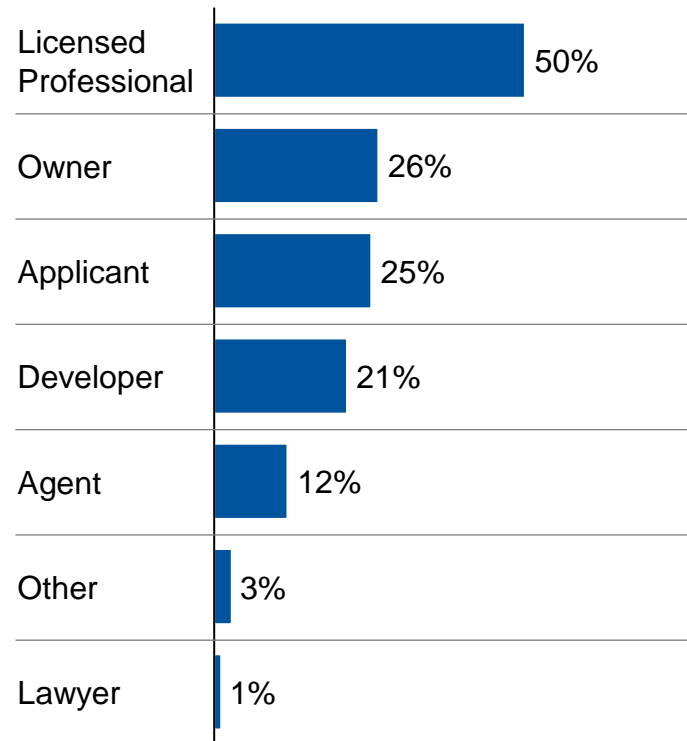
Customer experience

We surveyed 178 people who have recently gone through the site plan application / site development permit process (1/2)

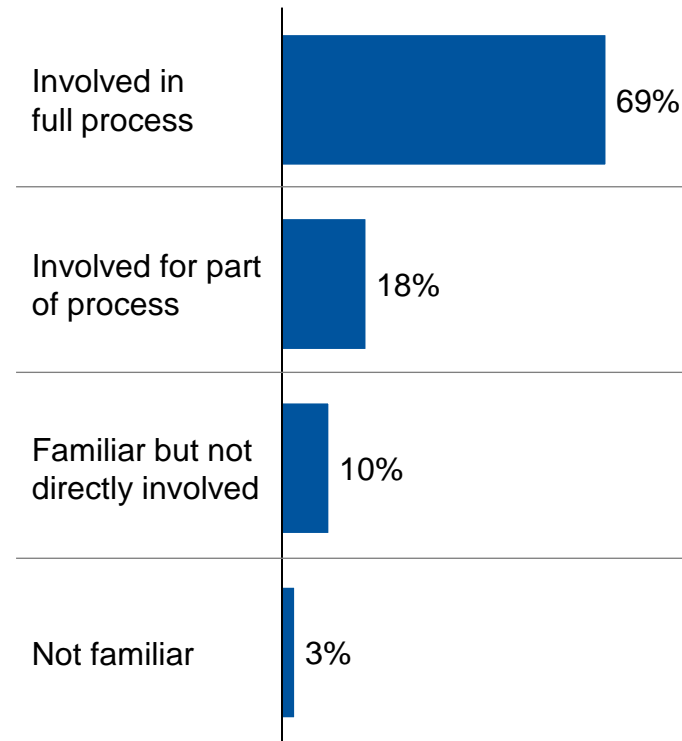
Survey respondent demographics

% of respondents, N = 178

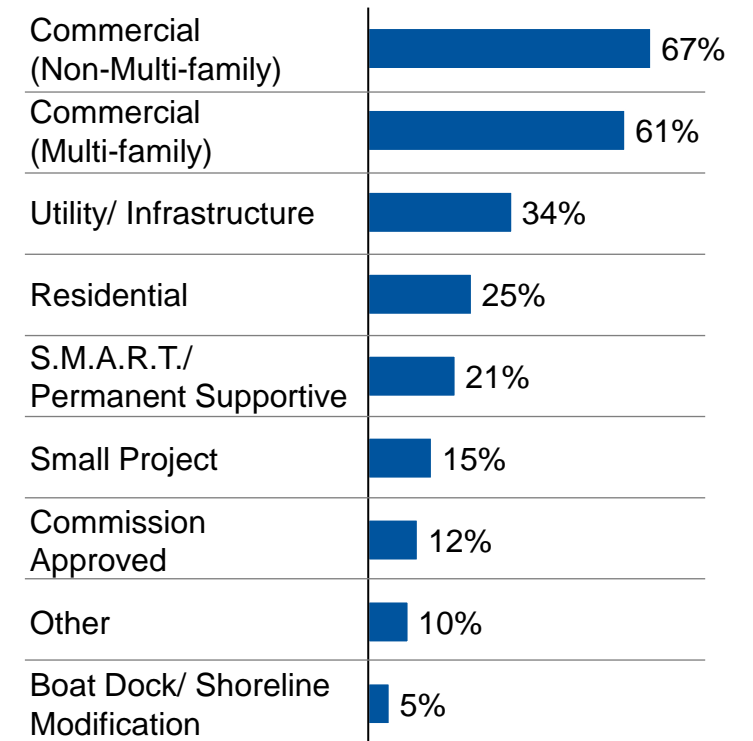
Applicant types



Involvement level



Application submitted for permit type (check all that apply)

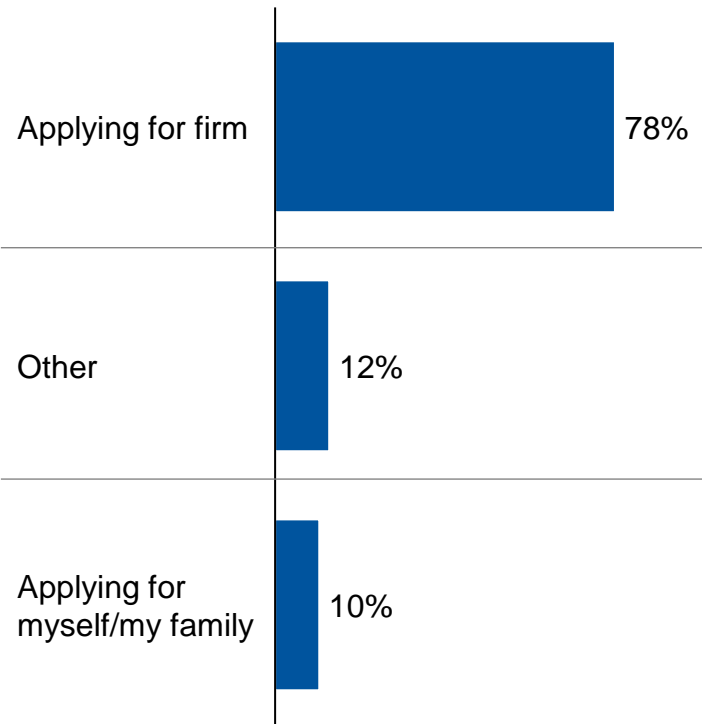


We surveyed 178 people who have recently gone through the site plan application / site development permit process (2/2)

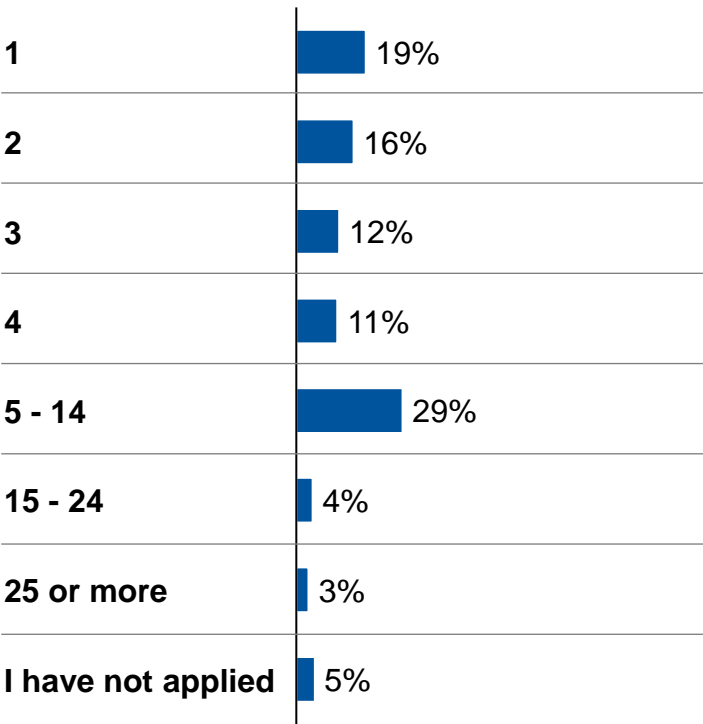
Survey respondent demographics

% of respondents, N = 178

Most recent application reason

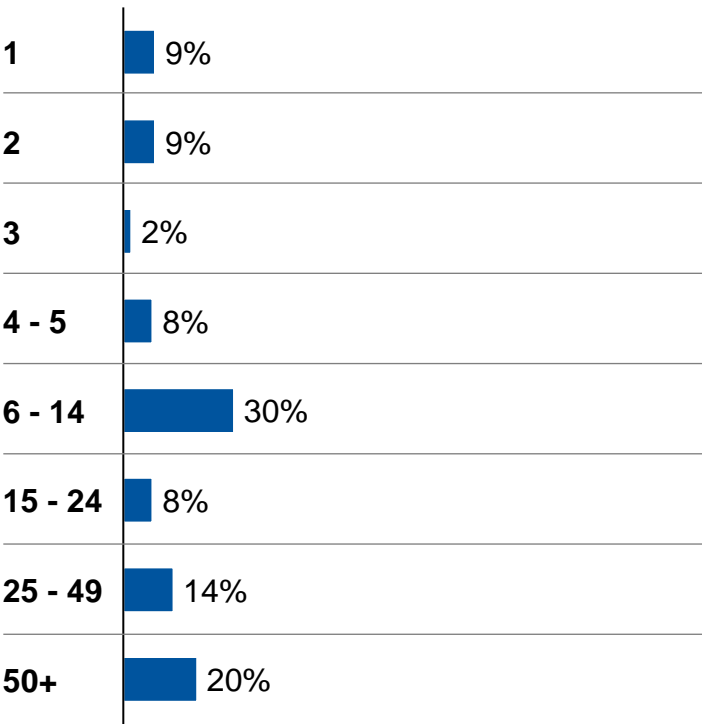


Self submissions



Firm submissions

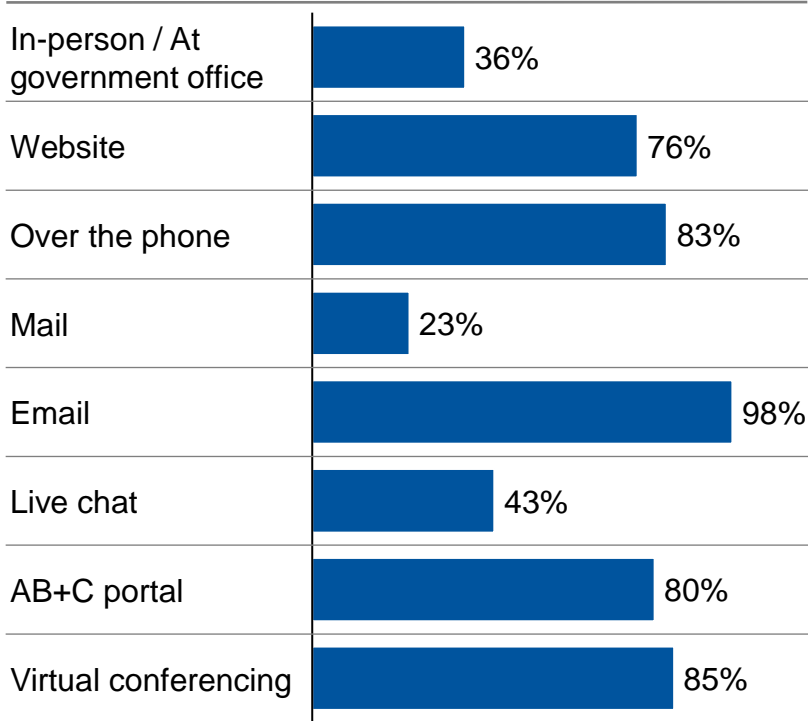
N = 138



Respondents prefer virtual conferencing (37%) and emailing (30%) as channels for interaction

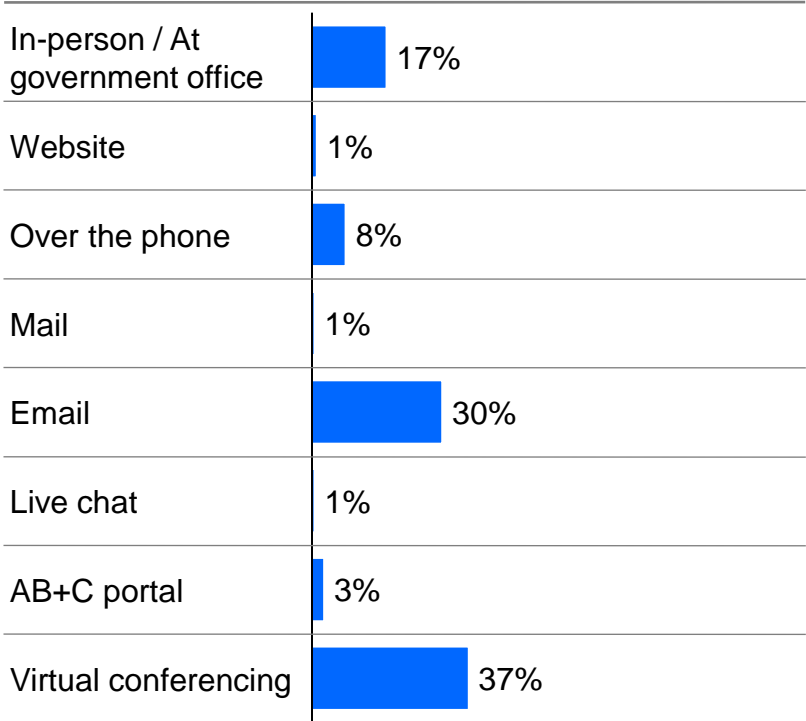
Interaction channels used¹

% of respondents, N = 178



Most preferred channel²

% of respondents, N = 178



Insights

- Despite ~**36%** of respondents being in-person on their most recent application, ~**17%** of respondents prefer in-person interactions
- Despite ~**80%** of respondents using the AB+C portal on their most recent application, ~**3%** selected it as the most preferred
- ~**98%** of respondents interacted with the City via email on their most recent application

Source: DSD customer survey results (May 2023)
1. Question: "Thinking about your most recent experience submitting an application for a site development permit from the City of Austin, which of the following methods did you use to make your submission?" (% respondents who used a channel at least 1 time during their most recent site plan application)
2. Question: "What is your most preferred way of interacting with the City of Austin regarding a site plan application?"



6/13 Workshop live polling (1/4)

What is your major takeaway from the synthesis of customer journey map and our discussion?

Sample responses from 13 participants

- “” We are all in the same boat. **We can turn this ship around**, but it'll take some serious training, city portal improvements, and streamlining of review timelines
- “” The team that participated for the city is serious about making changes. **BUT** the city staff respondents seem to be **frighteningly misunderstanding** what is their mission and who is their customer
- “” The City is **lacking an automated and intuitive digital workflow process** to manage the incoming workload for review staff and the customer
- “” **All are frustrated** with the completeness process. If that process can be more clearly defined and streamlined, incomplete plan submittal and timeline would benefit.
- “” It seems that there is **genuine desire** on both sides to improve the system. However, we've been through this process before (Zucker Report) and didn't see significant, material change.
- “” Seemingly **similar pain points** for reviewers and customers, often caused by technology or the code itself. Maybe they should stop making code requirements so complicated and onerous???
- “” It is evident the **system is unhealthy** on several levels and the expectations on both sides are not being clearly identified. This is a fantastic opportunity to **move forward with an overhaul** to improve the relationship between the department and those that are utilizing it
- “” **Staff is just as unhappy as the applicant is**
- “” Everyone is frustrated with the process, and **something needs to change** to make the process work for both applicants and the city

6/13 Workshop live polling (2/4)

Addressing which pain point would have the greatest impact on your overall experience? And why?

Sample responses from 14 participants

- “” *Being able to directly coordinate with reviewers and knowing that they will **respond within a few days**, but no more than 3 days.*
- “” *Ability to address and close out comments **outside of a formal update**, i.e., informal review.*
- “” *Delays in receiving comments, and when those comments are received, the fact that they **lack context, are irrelevant, a lack substance**, or conflict with other depts.*
- “” *Addressing the ability to have transparency and **responsive/productive/timely communication** would be the most impactful.*
- “” *Being able to get meetings in timely manner, and having the ability to **clear reviews informally***
- “” *More **clarity from reviewer's** vs high level/generic comments. And better code/criteria.*
- “” ***Lack of communication**/being able to reach staff to address comments.*
- “” *.....**a better method** to discuss solutions and conflicting comments between departments*
- “” *Obtain **draft comment report earlier** in the process. Would help get a jumpstart on addressing comments.*

6/13 Workshop live polling (3/4)

Looking forward at the next 3-6 months, if you could prioritize one thing to improve the process, what would it be?

Sample responses from 16 participants

- “ ” *It is very hard to choose one. Therefore, establishing a **gold standard training** ground is my choice because it appears to me that having a very clear and consistent way of reviewing, interpreting, timing, etc. would address many of the issues.*
- “ ” *I would prioritize an **expedited site plan review process** that generates more fees and can afford additional and qualified hires for DSD. And if you can't, go to third party, private reviewers to address the shortfall.*
- “ ” *Being able to get meetings in timely manner, and having the ability to **clear reviews informally***
- “ ” *Define a **mission statement** that addresses service to the applicant, not the individual reviewer's personal mission or the community, recognizing that it's the elected officials that are charged with serving the community.*
- “ ” *Formalize **pre-submittal** meetings*
- “ ” *Release **draft comments** as soon as they're ready*
- “ ” *Provide **virtual meetings** with all reviewers present when delivering first round master comment reports, if not when each master comment report is delivered to a customer.*
- “ ” *Improving the **portal/system** so that reviews can more easily be cleared informally*

6/13 Workshop live polling (4/4)

Looking forward at the next 12-18 months, if you could prioritize one thing to improve the process, what would it be?

Sample responses from 16 participants

- “ ” Getting **only one reviewer** across different applications for each department. Ex only one AW reviewer for SDP, AULCC, License agreement
- “ ” Fix the inability to **reach and resolve questions / issues** with individual review staff
- “ ” Implement improvements to AMANDA or roll out a new system that is beneficial to City staff and the customer.
- “ ” Training the reviewers to look for **solutions instead of problems**. And help them understand that the code is responsible for protecting our city, they host need to respect the code and what it's trying to do, while understanding that it doesn't apply to every situation and that's ok!
- “ ” Improve master comment report format with **code and in-depth comments**
- “ ” **Improved portal:** permit assignments and tracking..
- “ ” **Standardize site plan** review activities
- “ ” **Integration of the site plan process with the different stakeholder** organizations (AE, AWU, Land Management, AULCC). Eliminate redundant and conflicting reviews.
- “ ” Getting **review times to be consistently on time**

Application Scenario: Single family residential redevelopment

In this scenario, we consider the monthly carrying costs associated with redeveloping a single-family residential property to a duplex type multi-family residential property¹

Property details



Property value²: ~\$570K



Monthly lease income³: ~\$2,200



Habitable area³: ~2,100 sq. ft.

Source: Review of public sources and expert interviews

- 1. Entails investment of ~\$500k in addition to purchasing the property
- 2. Trailing 12-month value of single-family homes in Austin as of May 2023, according to Zillow
- 3. Below average estimate provided by Zillow for a selection of representative properties
- 4. Annual tax rate for Travis County, at ~2% of the property value
- 5. Average of 6 quotes from nationally recognized insurance carriers for \$750,000 coverage in Austin
- 6. Management cost calculated as 8% of the total lease income, in accordance with prevailing SFR management rates in the Austin market
- 7. Includes expenses for maintenance personnel, reflecting the current rates in the Austin market
- 8. 40% of property value financed through debt at 7.3% interest, 100% of pursuit capital financed by debt at 15% interest rate
- 9. Replacement reserve budgeted at 1% of the property value per year
- 10. 60% of property value funded through equity at an 18.00% rate
- 11. Tenant is responsible for utility charges, and therefore, these costs are not included in the carrying cost

Scenario

Monthly carrying costs

Line item	Cost	% of monthly carrying cost
Taxes ⁴	\$934	10%
Insurance ⁵	\$458	5%
Management ⁶	\$269	3%
Maintenance ⁷	\$94	1%
Cost of debt ⁸	\$2,342	24%
Cash outlay	\$4,098	42%
Repair reserve ⁹	\$473	5%
Cost of equity ¹⁰	\$5,109	53%
Total carrying cost ¹¹	\$9,681	100%



Application Scenario: Greenfield development

In this scenario, we consider the monthly carrying costs associated with developing a vacant lot to a multi-family residential property¹

Property details²



Average land value: ~\$1.35MM



Average area of the lot: ~7 acres

Source: Review of public sources and expert interviews

- 1. Entails developing a multi-family property with \$100MM project cost
- 2. Average land value and area determined based on a selection of 20 vacant land applications submitted in 2022
- 3. Annual tax rate for Travis County, ~2% of the property value
- 4. Insurance cost includes liability coverage, calculated based on the 2021 national average and adjusted for inflation and the cost of healthcare in Austin
- 5. Includes electricity and water costs, calculated at commercial rates applicable in Austin
- 6. Expenses related lawn care, reflecting the prevailing rates in the Austin market
- 7. 50% of land value financed through debt at 7.85% interest and 100% of pursuit capital funded by debt at 15% interest
- 8. 50% of land value funded through equity at 18.00% rate

Scenario

Monthly carrying costs

Line item	Cost	% of monthly carrying cost
Taxes ³	\$2,258	6%
Insurance ⁴	\$31	0%
Utilities ⁵	\$967	3%
Maintenance ⁶	\$700	2%
Cost of debt ⁷	\$23,238	62%
Cash outlay	\$27,194	73%
Cost of equity ⁸	\$10,291	27%
Total carrying cost	\$37,485	100%



Application Scenario: Multi-family residential redevelopment

In this scenario, we consider the monthly carrying costs associated with redeveloping a multi-family residential property¹

Property details



Median property value²: ~\$38MM



Monthly lease income per unit³: \$1,728



Average number of units⁴: 259

Source: Review of public sources and expert interviews

- 1. Entails tearing down current structure and building a new one with \$100MM project cost
- 2. Median property value of all four approved 2022 Multi-Family Residential (MFR) current use applications in TCAD (Travis Central Appraisal District)
- 3. Average asking rent for multi-family residential properties in 2023, sourced from the Matrix Multifamily Austin Report - March 2023
- 4. Average number of units in a multi-family residential property in Austin, as indicated by the Matrix Multifamily Austin Report - March 2023
- 5. Annual tax rate for Travis County, ~2% of the property value
- 6. Annual insurance rate of \$500 per unit, based on expert advice
- 7. Management cost as 3% of lease income, based on expert interviews
- 8. Includes electricity, water, and trash costs, calculated at commercial rates applicable in Austin
- 9. Includes expenses for lawn care, maintenance, and security staff, reflecting current rates in the Austin market
- 10. 40% of property value financed through debt at a 6.8% interest rate and 100% of pursuit capital funded by debt at a 15% interest rate
- 11. 60% of property value funded through equity at an 18.00% rate

Scenario

Monthly carrying costs

Line item	Cost	% of monthly carrying cost
Taxes ⁵	\$62,557	11%
Insurance ⁶	\$10,776	2%
Management ⁷	\$13,407	2%
Utilities ⁸	\$2,309	0%
Maintenance ⁹	\$9,668	2%
Cost of debt ¹⁰	\$105,161	19%
Cash outlay	\$203,878	37%
Cost of equity ¹¹	\$342,095	63%
Total carrying cost	\$545,973	100%





6/01 Workshop live polling (1/3)

“What is your major takeaway from the synthesis of customer journey map and our discussion?”

Sample responses from 28 participants

- “” *There are a few places **where staff and applicants are unhappy about the same issues**, and those should be low hanging fruit to address*
- “” *There are a **lot of opportunities** to improve our customer experience*
- “” *We have **different goals**, but **both sides are frustrated***
- “” *Scared, angry, confused and similar **emotions are expected when a system is overly complex**, opaque, and not aligned with One City Voice*
- “” *We need some **big changes...not little fixes***
- “” ***Positive responses** are brief & **not sustained***
- “” ***Mostly unhappy experience***
- “” ***Internal conflict / delay** leads to **external dissatisfaction***
- “” *The applicants and City staff are **talking past each other**. Staff is frustrated they don't have all the required info to make interpretations and applicants are frustrated they aren't being told consistently how to correct their plans for compliance.*
- “” *Lots of parts of the process need improvements - also **employee satisfaction drives customer satisfaction***
- “” ***Everyone is burnt out** from perceived lack of efficiency and clarity; staff need more clarity on driving vision/purpose*

6/01 Workshop live polling (2/3)

“Looking forward at the next 12 months, if you could prioritize one thing to improve how you and your colleagues work together, what would it be?”

Sample responses from 24 participants

- “ ” *Institute a true **case manager** environment that gives an applicant a **single point of contact** for the entire process*
- “ ” *Overall site plan **help guide/process documentation** for both internal and external use*
- “ ” ***Improve case management** to provide better clarity and conflict resolution*
- “ ” *Improved **technology** for process **transparency***
- “ ” *Ongoing coordination **meetings between departments** to address code/criteria conflicts.*
- “ ” ***Training academy** for staff and consultants*
- “ ” ***Fast track** AMANDA replacement*
- “ ” *Public facing **pizza tracker** / status*
- “ ” *Open **timely communication***
- “ ” *Better **training** for staff*
- “ ” *Work with **other departments** on a **regular basis***
- “ ” ***Clean up conflicting code** provisions.*

6/01 Workshop live polling (3/3)

“Looking forward at the next 12 months, if you could prioritize one thing to improve Customer Experience, what would it be?”

Sample responses from 30 participants

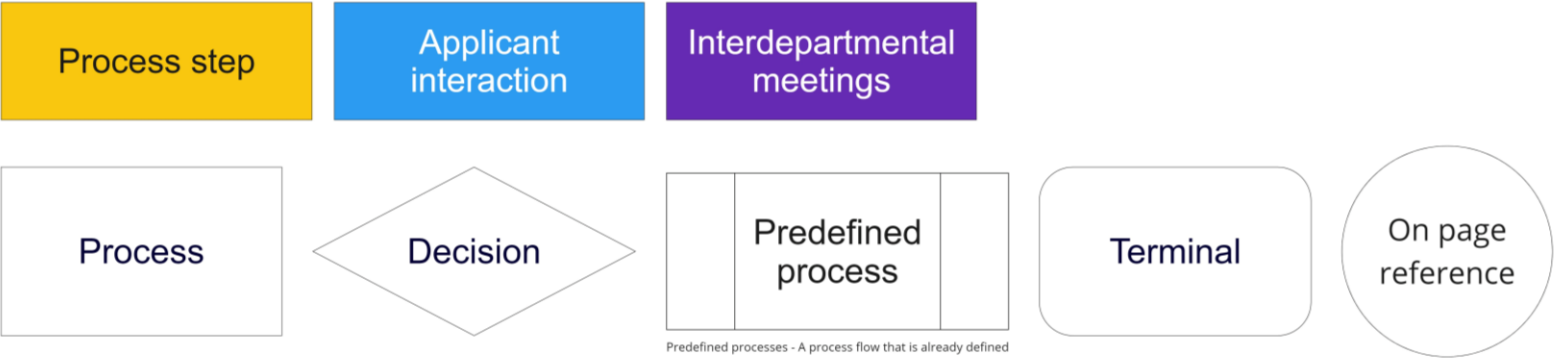
- “” Start with **shared purpose and then work down** into Dept/Council goals that create conflict/competition
- “” Clear **interdepartmental coordination** and conflict resolution processes
- “” **Internal site plan process academy** - so different reviews understand general processes/requirements
- “” Carve out time to **think forward** about solutions rather than be reactive
- “” **Clarity of roles and responsibilities** including escalation paths to more quickly address competing priorities (cost vs environment vs)
- “” **Collaboration with all participants** acknowledging their part to improve the timelines and outcomes
- “” **Clarity on who we're serving**
- “” **Regular collaboration meetings**
- “” Define roles, write them down, and **designate final decision makers**
- “” **Shared KPIs and accountability**
- “” Group meetings like this - **group as a governing body to drive actions** and change for consistency
- “” **Shared tools & SOPs for consistency**



Processes

Process maps

Legend



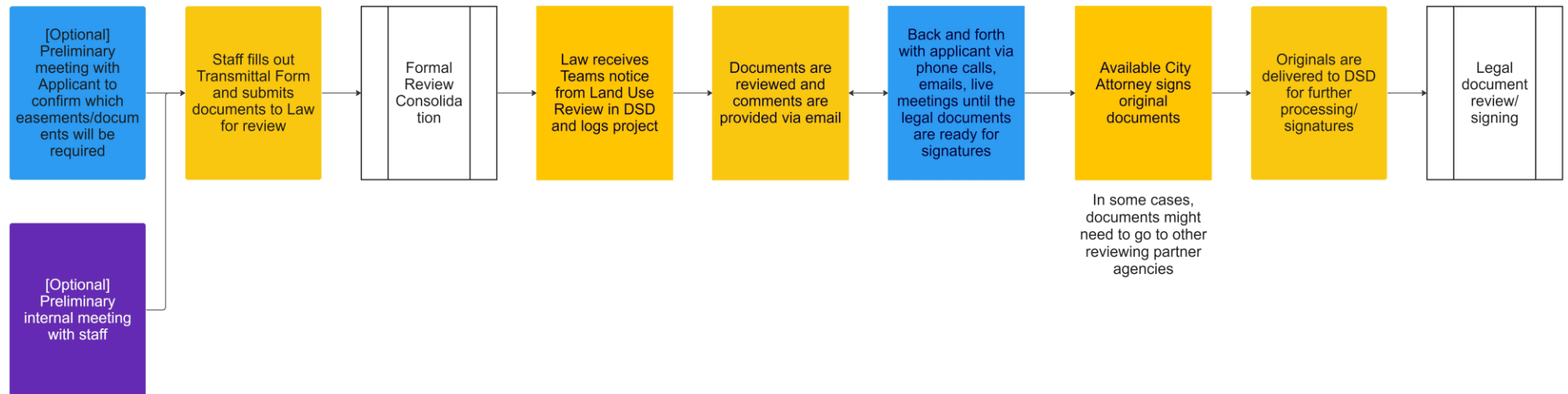
Predefined processes - A process flow that is already defined elsewhere

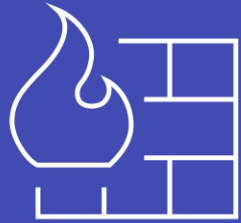
- End of intake: Completeness check (CC)
- Start of DSD & Department CC: Application intake
- End of DSD & Department CC: Completeness check consolidation & applicant notification
- End of formal intake: Departmental formal review
- Start of DSD & Department formal review: Formal application intake
- End of DSD & Department formal review: Formal review consolidation & applicant notification
- Start of permit issuance: Legal document review/signing
- End of permit issuance: Site plan release



Austin Law Process Map

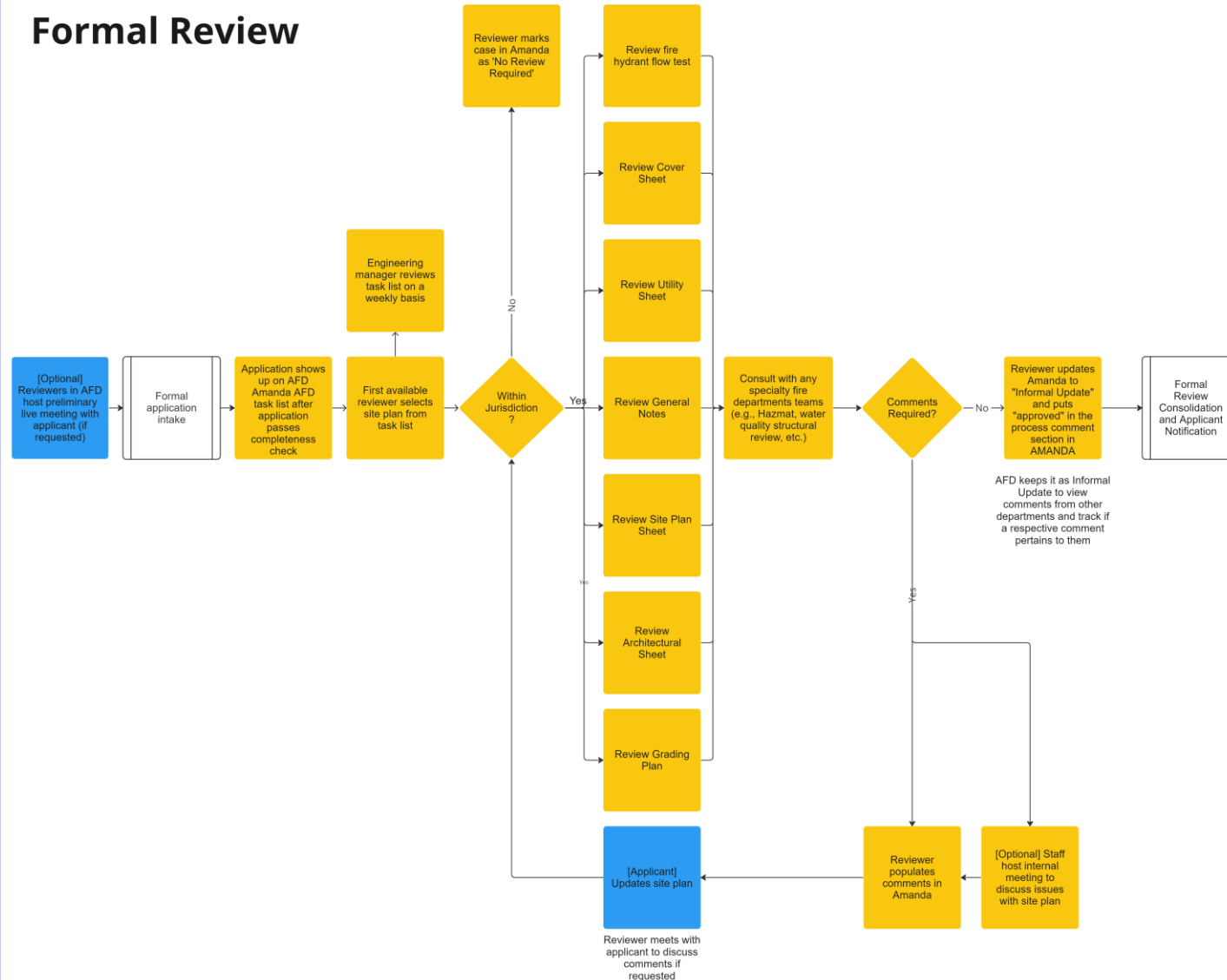
Permit Issuance





Austin Fire Department Process Map

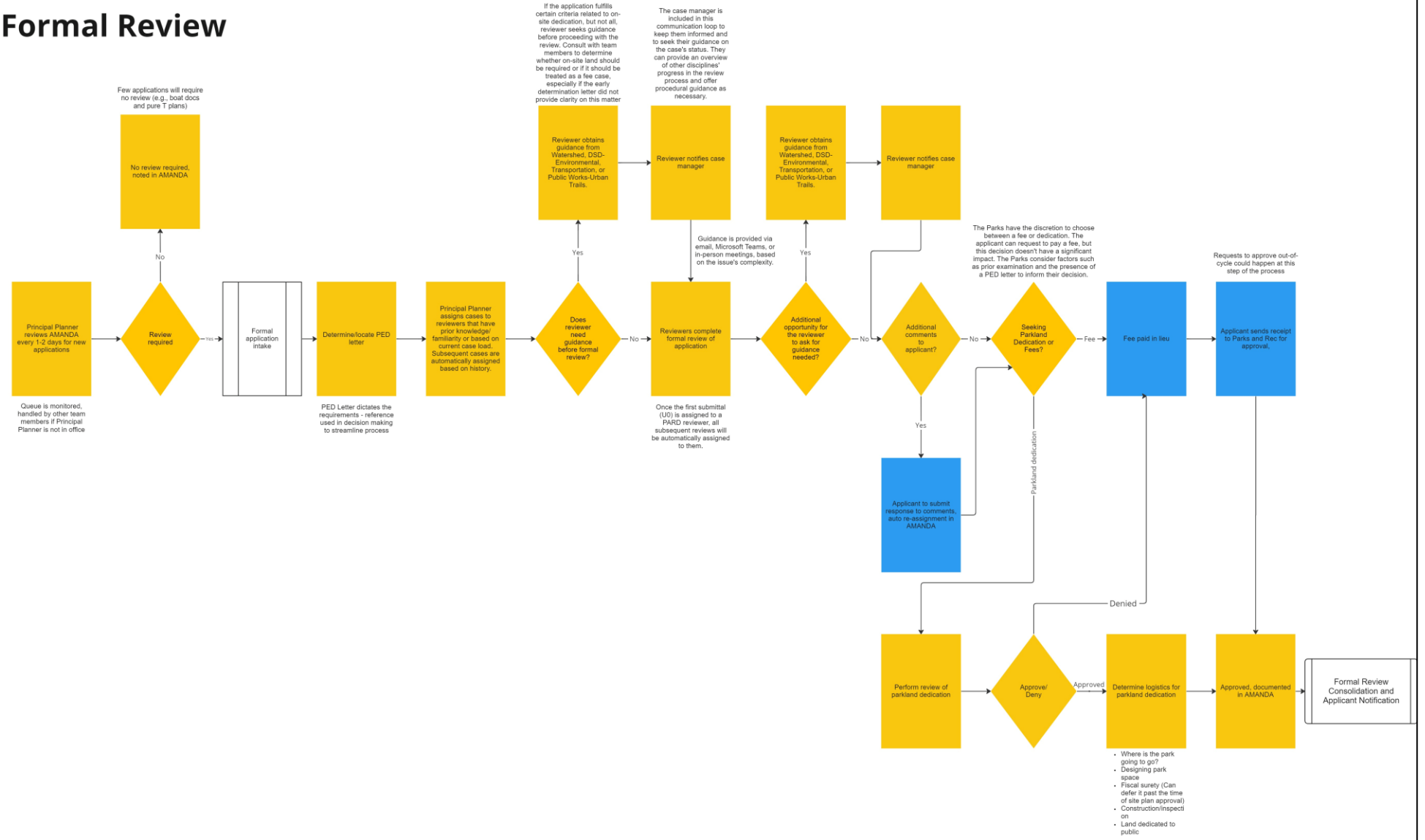
Formal Review



Parks and Recreation Process Map



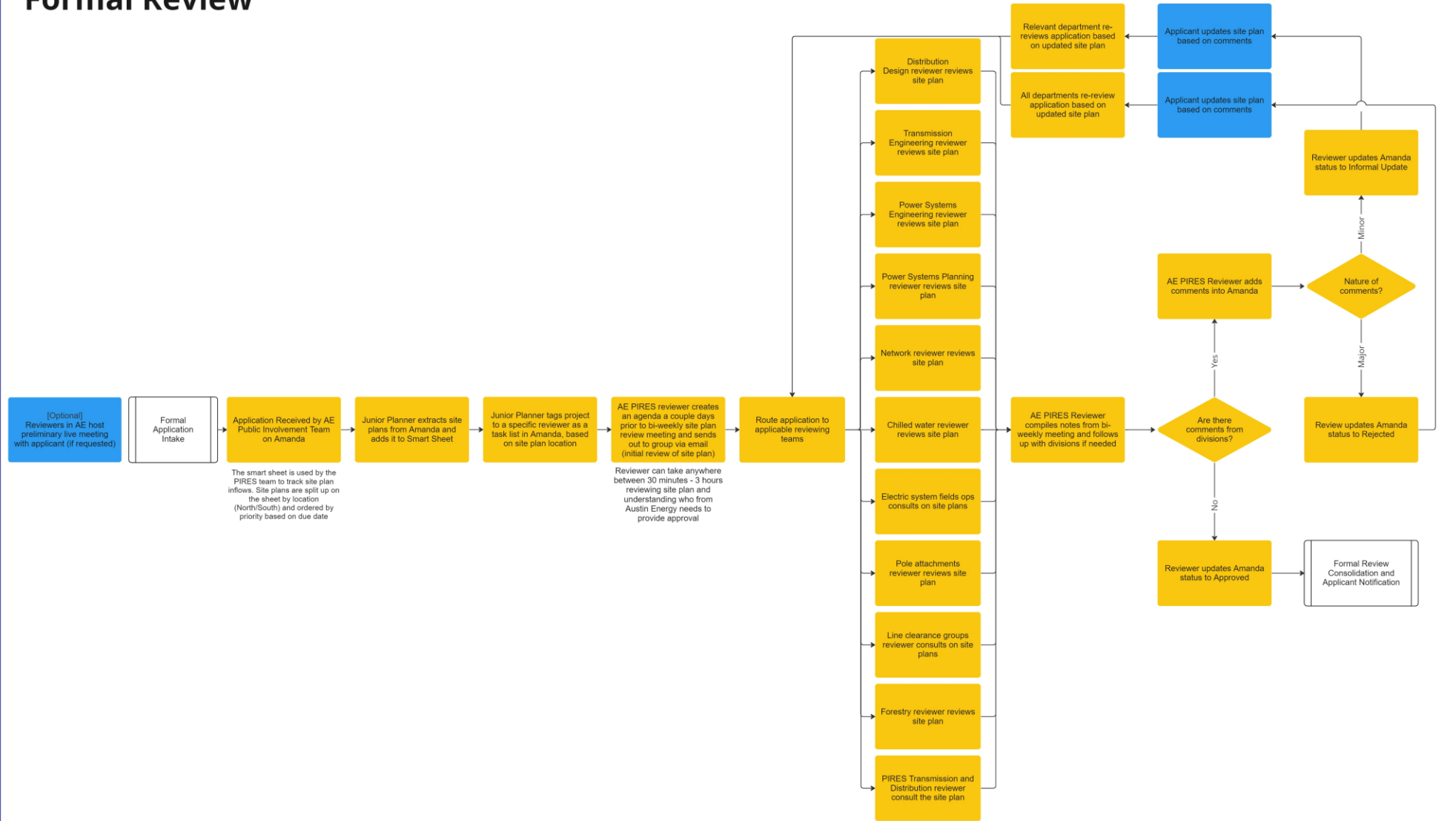
Formal Review

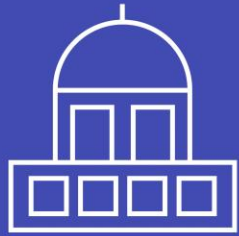




Austin Energy Process Map

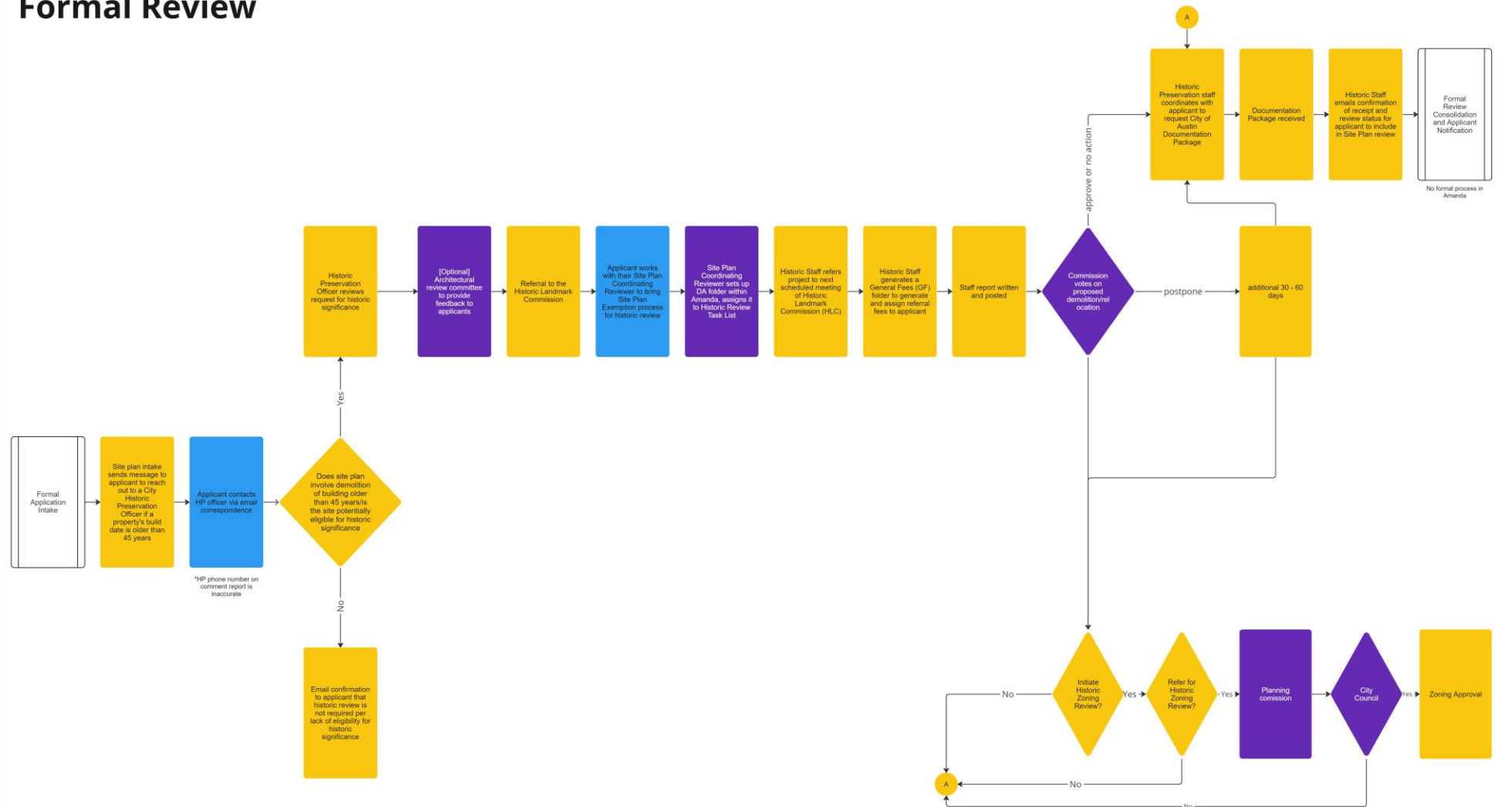
Formal Review





Historical Preservation Process Map

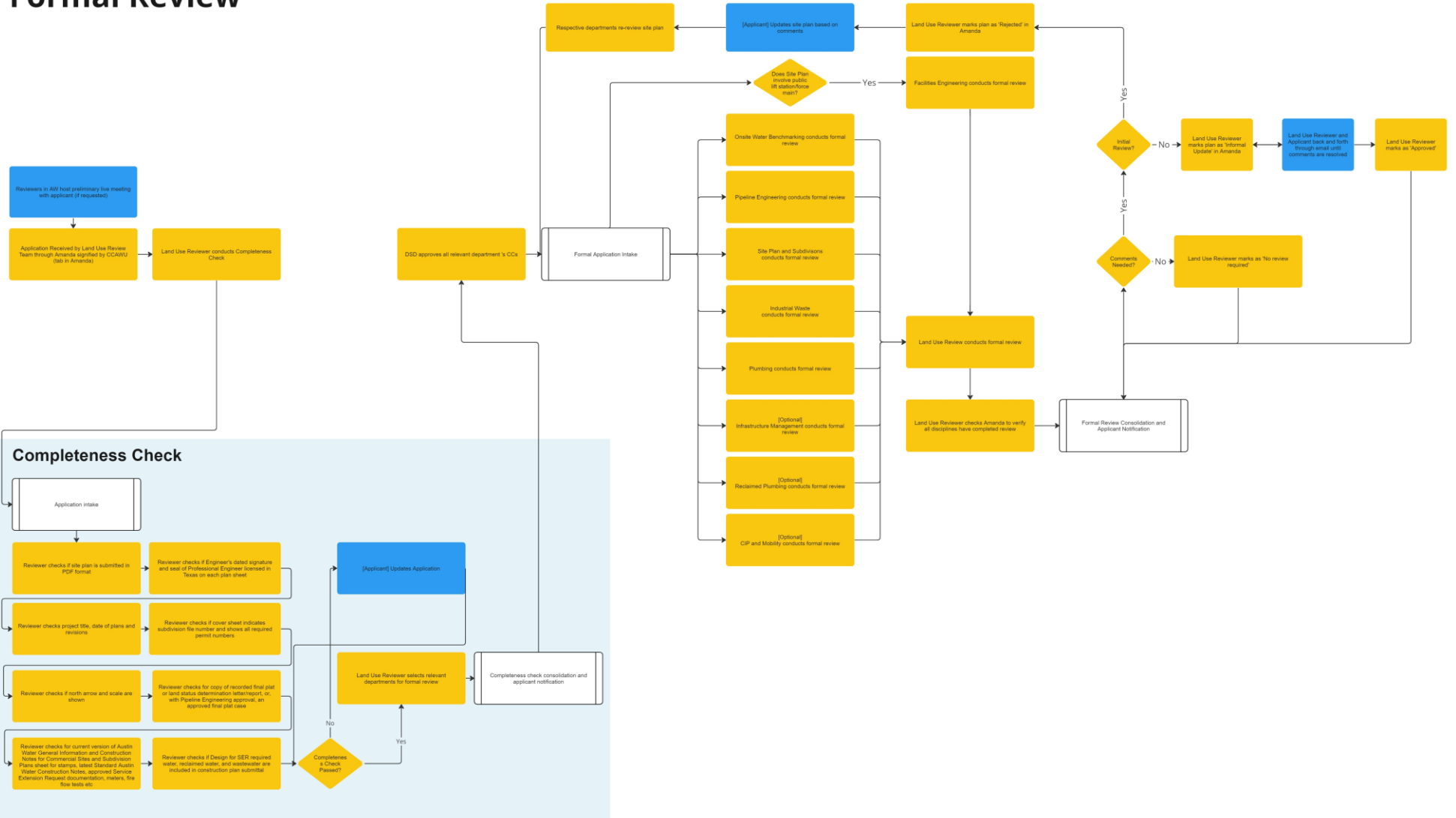
Formal Review





Austin Water Process Map

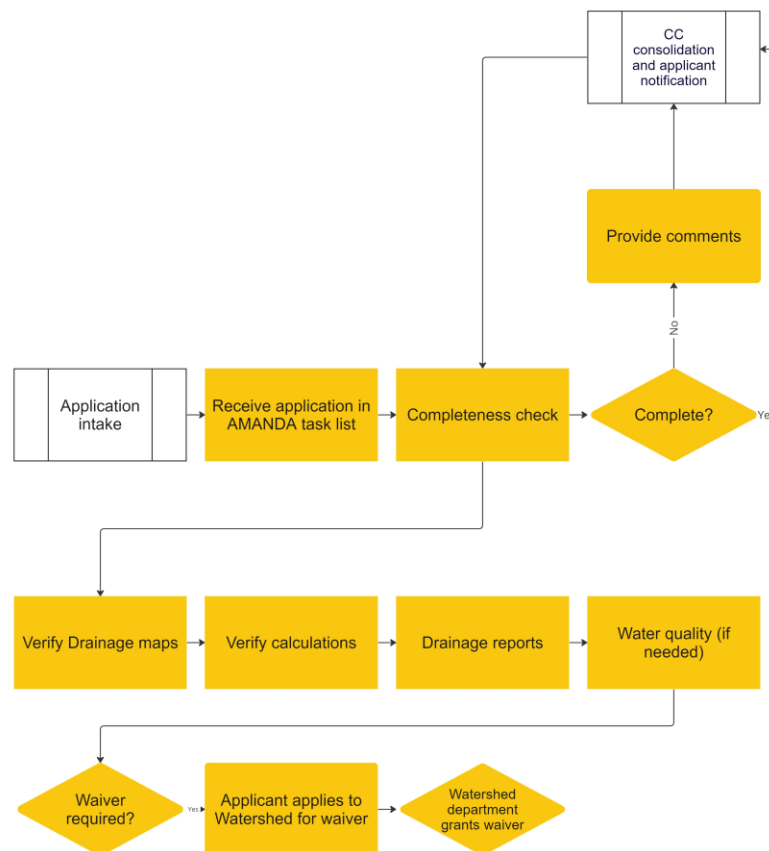
Formal Review



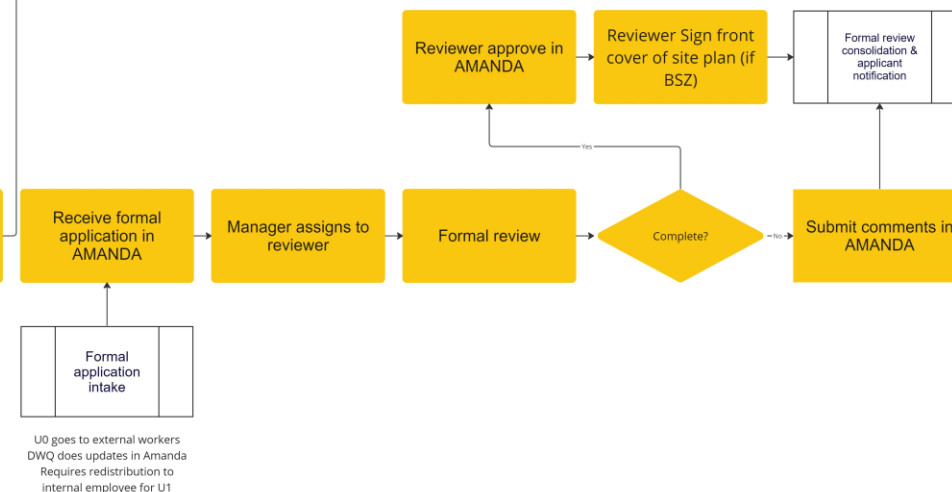


DSD - Drainage/ Water Quality Process Map

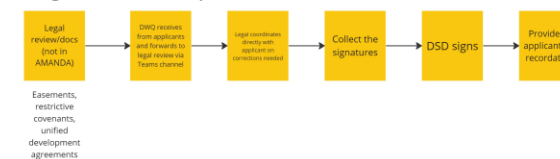
Completeness Check



Formal Review

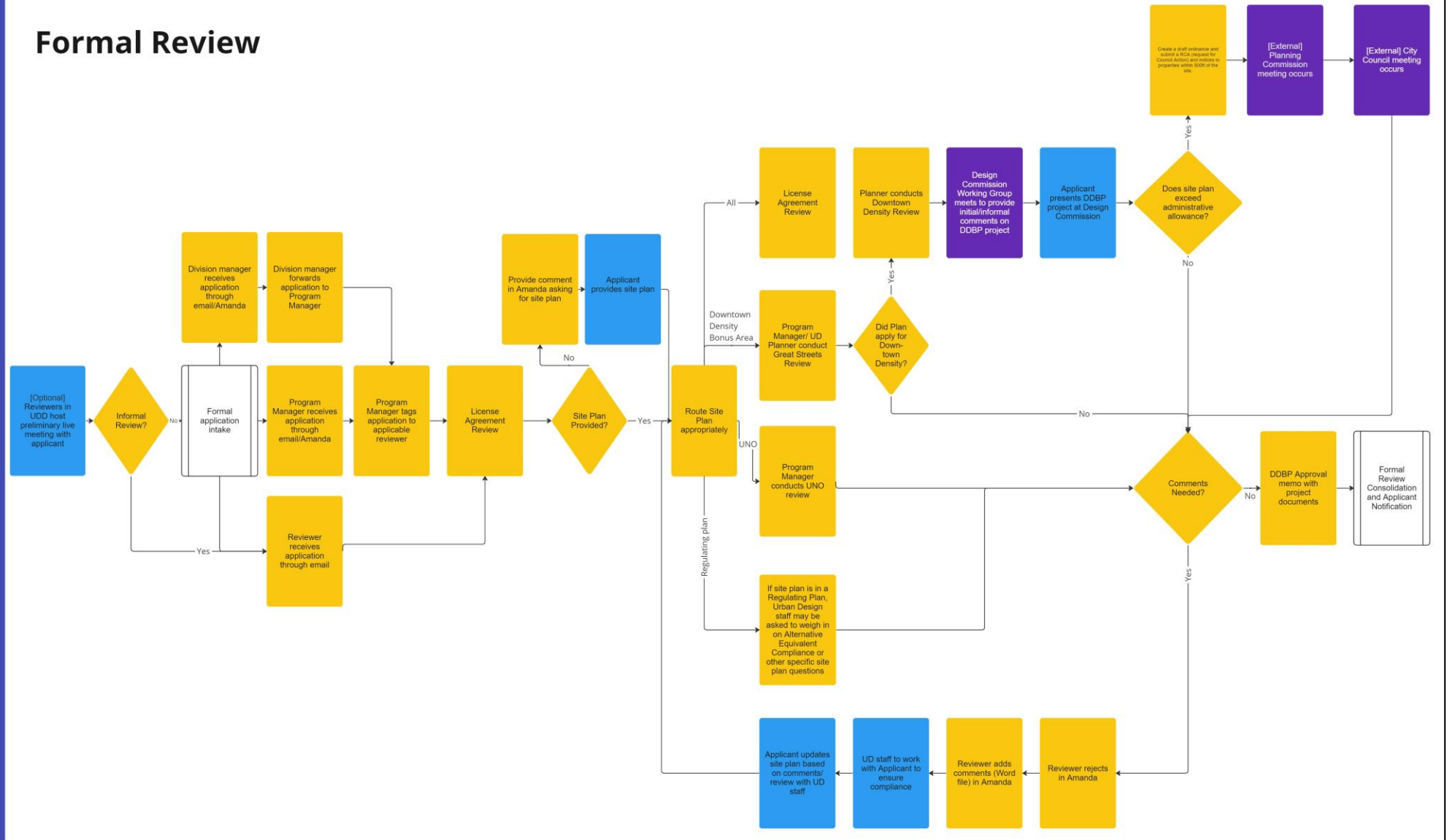


Legal document process



Urban Design Process Map

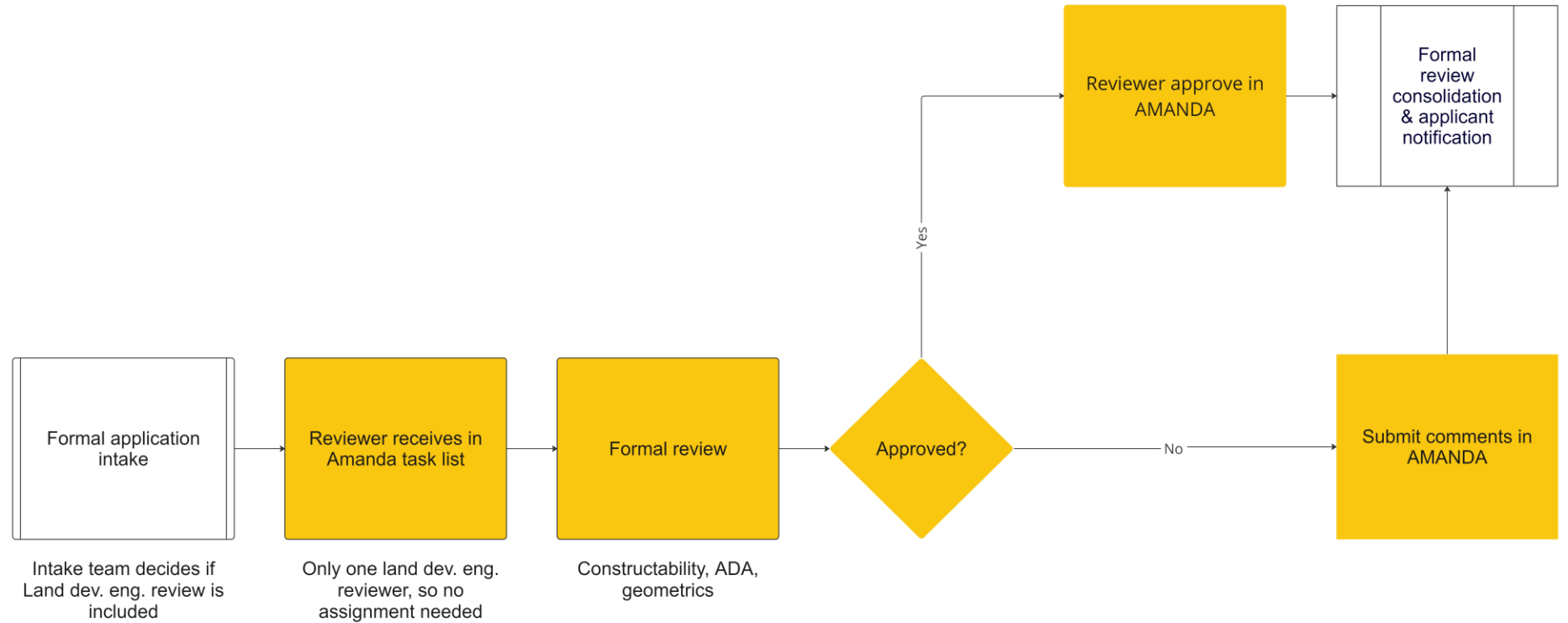
Formal Review

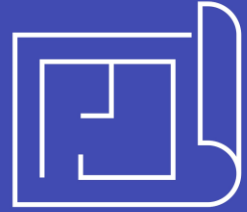




DSD - Land Development Engineering Process Map

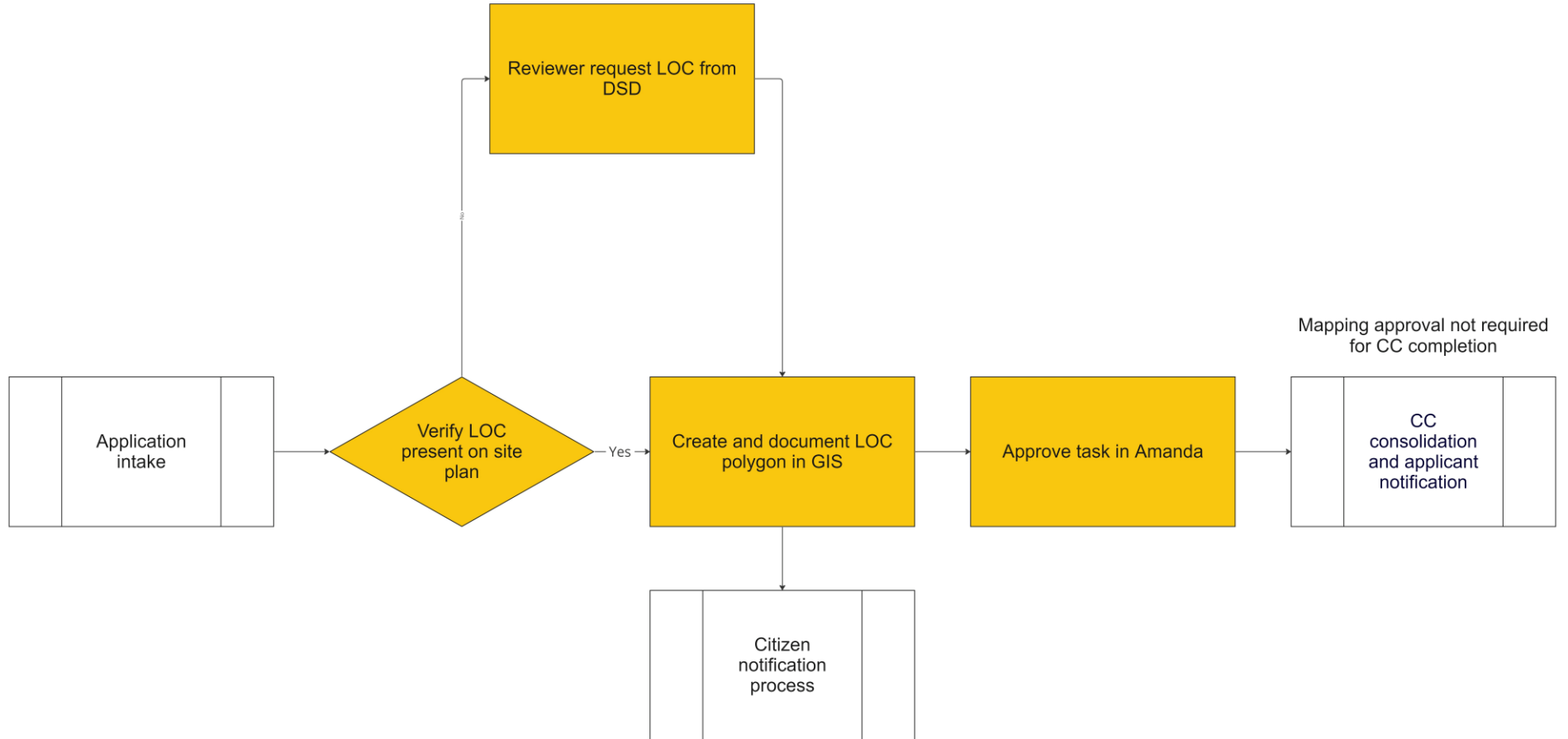
Formal Review





Mapping Process Map

Completeness Check

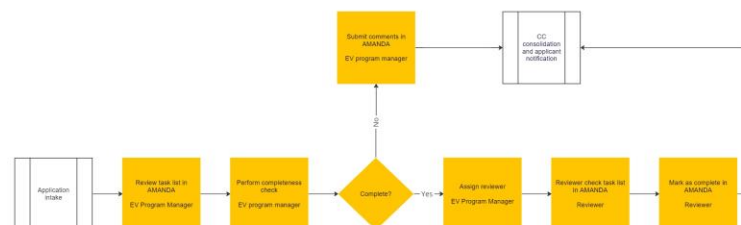




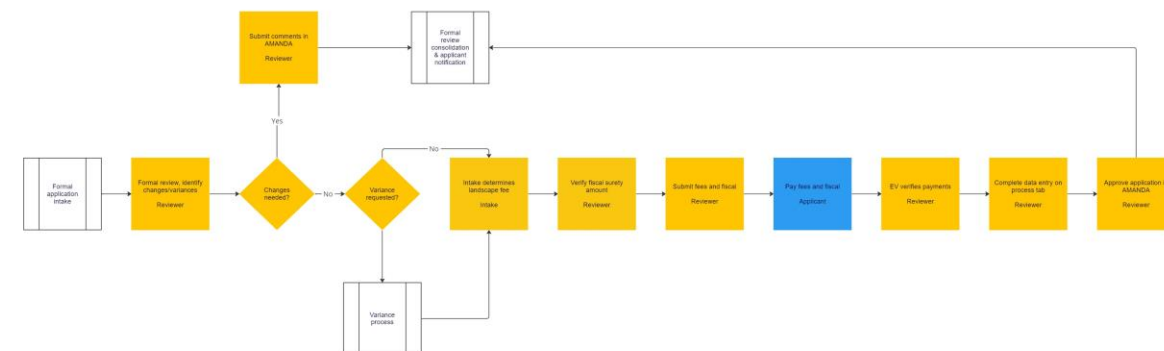
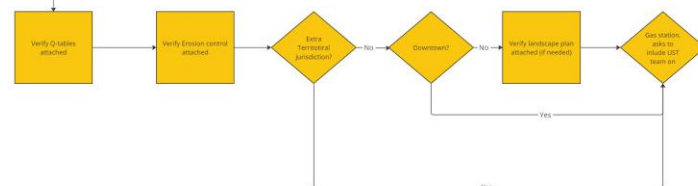


DSD - EV Process Map

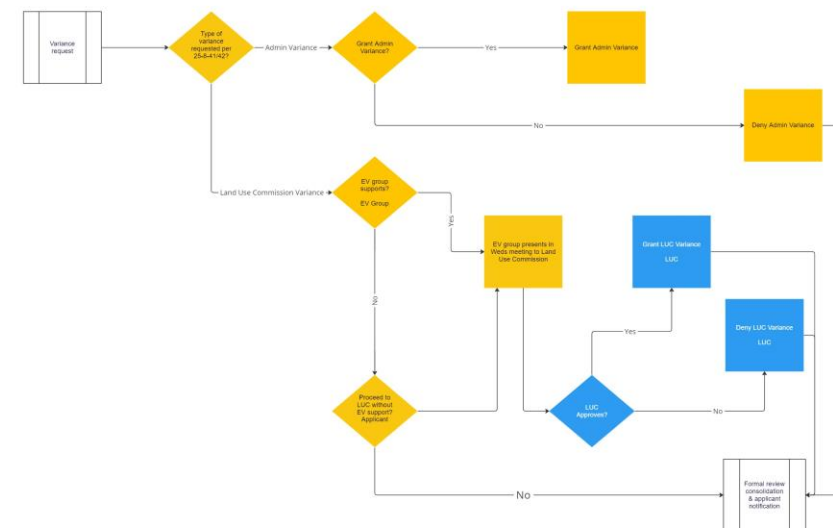
Overall process



Completeness check



Variance process





```

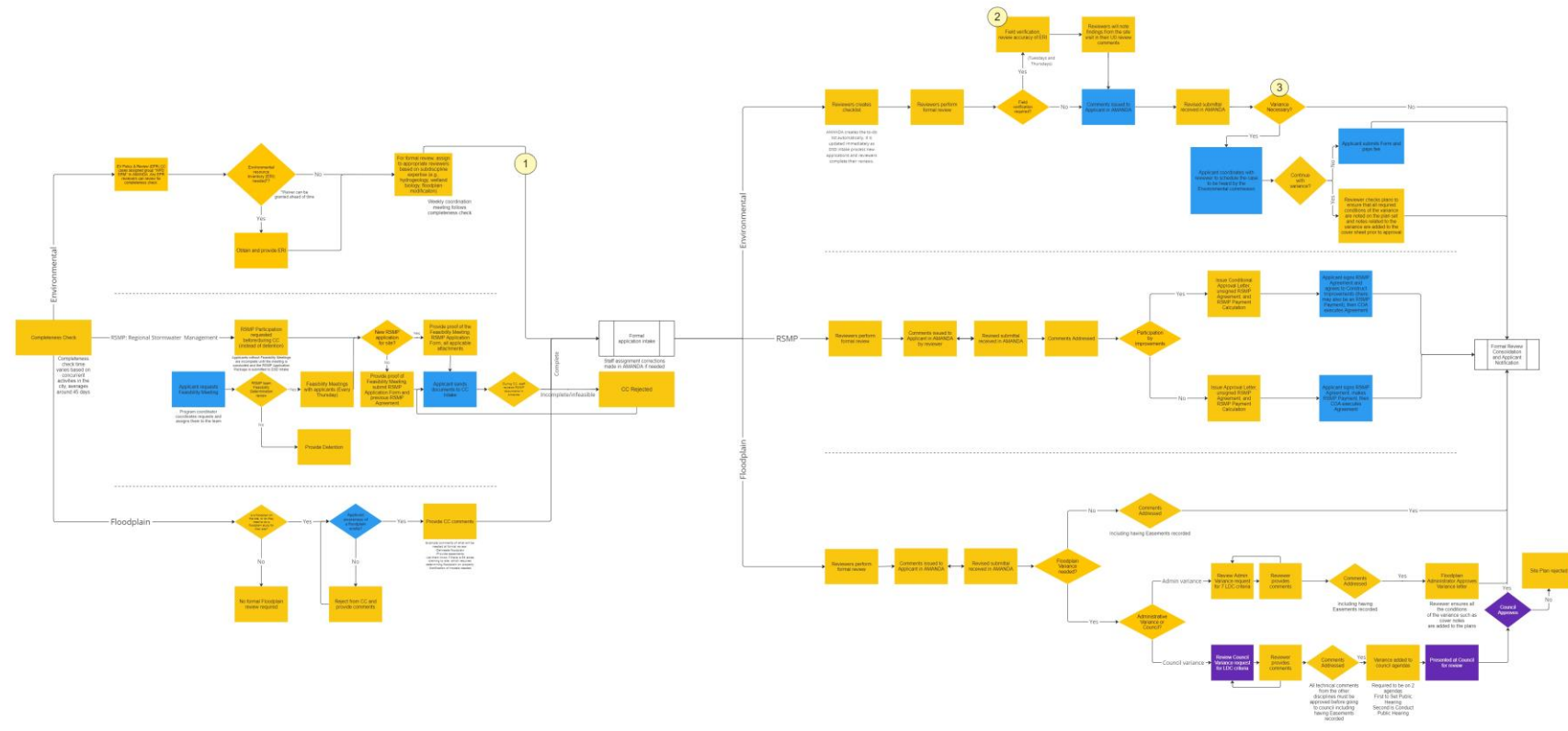
graph LR
    Start([Start]) --> Receive[Receive application via web form]
    Receive --> Freshdesk[Freshdesk ticket created via email]
    Freshdesk --> HB3167{HB 3167 Special case?}
    HB3167 -- Yes --> HB3167Spec[HB3167 specialist handles with customer]
    HB3167 -- No --> AssignFD[Assign to Intake team member in FD]
    HB3167Spec --> AssignFD
    AssignFD --> Regs{Need Regs Determination?}
    Regs -- Yes --> VRD[Applicant informed to re-apply under VRD rules]
    Regs -- No --> Download[Download files from web form (tool for bulk download)]
    VRD --> Download
    Download --> CreateAMANDA[Create AMANDA file from app data]
    CreateAMANDA --> Upload[Upload files to AMANDA (~10min per app)]
    Upload --> CreateInvoice[Create invoice in AMANDA, email notification to applicant]
    CreateInvoice --> SendInvoice[Send invoice to applicant via webform and close ticket in Freshdesk]
    SendInvoice --> PayInvoice[Pay Invoice in AMANDA Applicant]
    PayInvoice --> CheckPayment{Check payment status}
    CheckPayment -- Paid --> Transfer[Transfer to disciplines in AMANDA for completeness check]
    CheckPayment -- Not Paid --> EmailFailed[Email applicant of failed check Intake staff]
    Transfer --> Monitor[Monitor completeness check durations from Master comment Report]
    Monitor --> GenerateLetter[Generate completeness check results letter]
    GenerateLetter --> CompCheckPassed{Completeness check passed?}
    CompCheckPassed -- Yes --> CalculateFees[Calculate fees & send results via email]
    CompCheckPassed -- No --> EmailFailed
    CalculateFees --> End([End])
    EmailFailed --> CreateTicket[Create ticket on webform]
    CreateTicket --> UploadRevised[Upload revised forms Applicant]
    UploadRevised --> PayInvoice
  
```

```

graph LR
    Start([Start]) --> Receive[Receive application via web form in Freshdesk]
    Receive --> Assign[Assign to Intake team member in FD  
Intake Lead]
    Assign --> Check{Check payment status}
    Check -- Paid --> Intake1[Intake team member check dates/names in Info Tab, hit distribute, then check process tab]
    Intake1 --> Intake2[Intake team member Downloads files from web form (if additional files added)]
    Intake2 --> Intake3[Intake team member Uploads files to AMANDA]
    Intake3 --> Intake4[Intake team member Assigns to departments in AMANDA for formal review]
    Intake4 --> Intake5[Intake team member Checks process tab]
    Intake5 --> End([End])
    
    Check -- Not Paid --> Pay[Pay fee Applicant]
    Pay --> Assign
  
```

The flowchart illustrates the intake process. It begins with a 'Start' terminal, leading to 'Receive application via web form in Freshdesk'. This step leads to 'Assign to Intake team member in FD Intake Lead'. From here, the process reaches a decision point: 'Check payment status'. If the payment is 'Paid', the process continues through a series of steps: 'Intake team member check dates/names in Info Tab, hit distribute, then check process tab', 'Intake team member Downloads files from web form (if additional files added)', 'Intake team member Uploads files to AMANDA', 'Intake team member Assigns to departments in AMANDA for formal review', and finally 'Intake team member Checks process tab', before reaching the 'End' terminal. If the payment is 'Not Paid', the process branches to 'Pay fee Applicant', which then loops back to the 'Assign to Intake team member in FD Intake Lead' step. A 'Departmental formal review' box is shown below the 'Assigns to departments' step, indicating a parallel or subsequent activity.

Formal Review

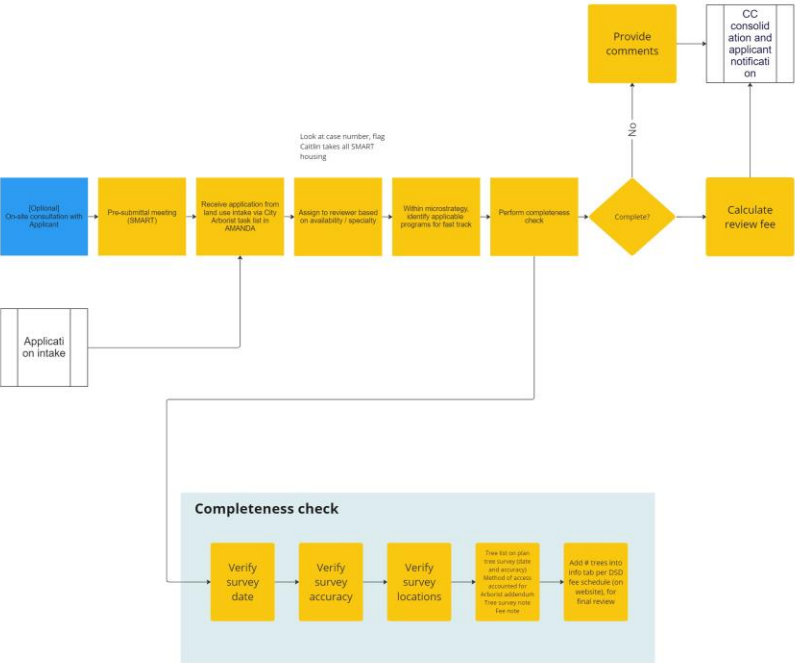


- 4 potential process outcomes:
1. No review required.
 2. Project needs a wetlands biologist review
 3. Project needs a hydrogeologist review
 4. Project needs a floodplain modification review.
- Note: If both wetlands and floodplain modification reviews are required, the same review staff are assigned for both processes. Hydrogeo is typically a different staff member from WB and FPM.

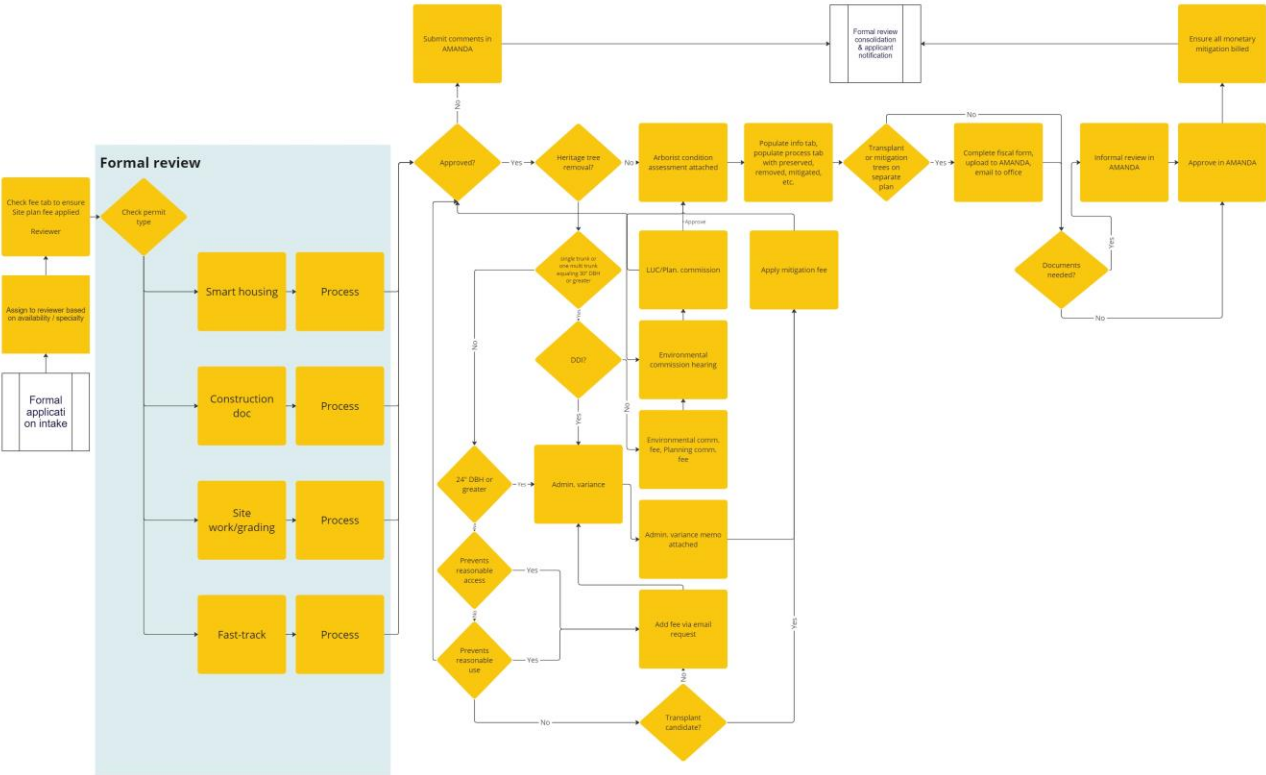


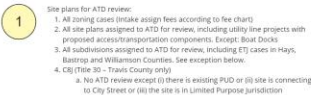
DSD - Tree
Process Map

Completeness Check



Formal Review

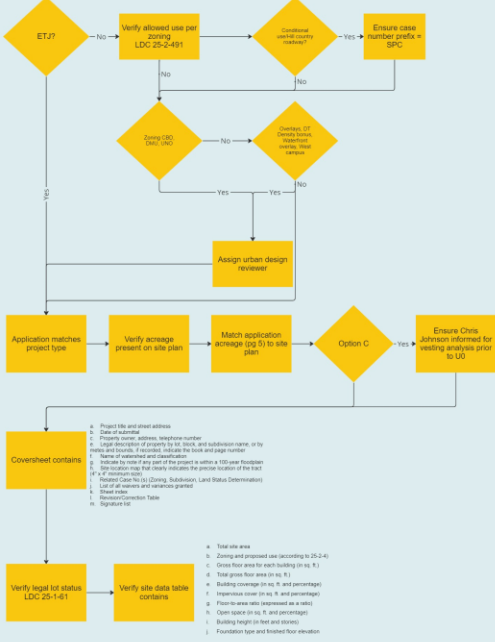






```

graph LR
    A[Application intake] --> B[Planning officer receives task in AMANDA and Microstrategy]
    B --> C[Perform completeness check]
    C --> D{Complete?}
    D -- No --> E[Add comments in AMANDA]
    E --> F[CC consolidation and applicant notification]
    F --> B
    D -- Yes --> G[Assign case manager in AMANDA]
    G --> H[Approve in AMANDA]
    H --> B
  
```



Formal Review

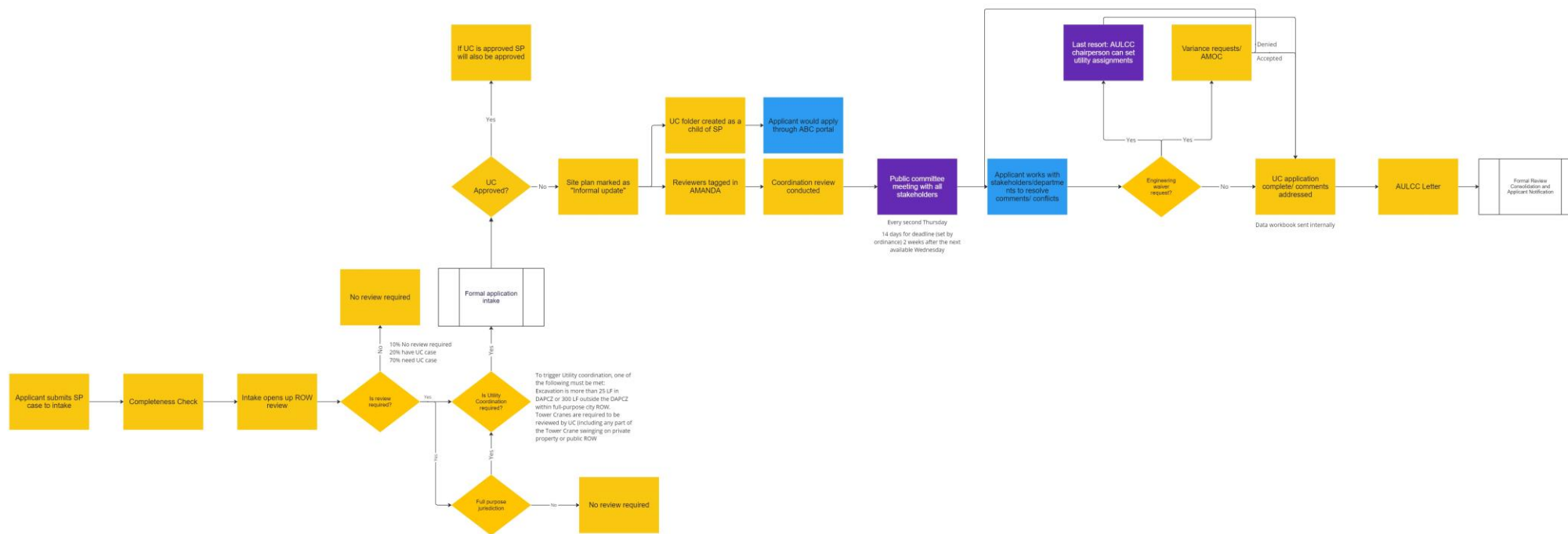
```
graph LR; A[Formal application stake] --> B[Case manager perform formal review]; B --> C{Approved?}; C --> D[Approve in AMANDA]; C --> E[Submit comments in AMANDA]; E --> F[Form review consolidation & applicant notification]; F --> B; D --> G[Wait for all other review disciplines to clear comments]; G --> H[Ensure all fees are paid (initiated by AMANDA)]; H --> I[Issue paper permit]; I --> J[Circulate legal docs for signature]; J --> K[Release signed and stamped plan set]; K --> L[Pre-construction meeting with EY inspector]; D --> M[Legal document re-signing Applicant]; M --> K;
```

The flowchart illustrates the Formal Review process. It begins with a 'Formal application stake' box, which leads to a 'Case manager perform formal review' box. From there, the process reaches a decision diamond labeled 'Approved?'. If not approved, the flow goes to 'Submit comments in AMANDA', then to 'Form review consolidation & applicant notification', and back to the 'Case manager perform formal review' box. If approved, the flow proceeds to 'Approve in AMANDA'. From 'Approve in AMANDA', the process continues through several steps: 'Wait for all other review disciplines to clear comments', 'Ensure all fees are paid (initiated by AMANDA)', 'Issue paper permit', 'Circulate legal docs for signature', and 'Release signed and stamped plan set'. Finally, the process concludes with a 'Pre-construction meeting with EY inspector'. Additionally, there is a feedback loop from 'Approve in AMANDA' to 'Legal document re-signing Applicant', which then feeds back into the 'Release signed and stamped plan set' step.



AULCC Process Map

Formal Review



Analysis of review steps

As of 6/12/23

Comprehensive list of overlapping sections/codes and metric themes¹

N = 29 site plan review documents²

47

sections / codes referenced by 2+ specialties³

DCM 1-2-2	LDC 25-5-1	UCM 2-9-4
DCM 1-2-2-G	LDC 25-5-146	UPC 307-1
DCM 1-2-4-E-11	LDC 25-6	UPC 609-6
DCM 8	LDC 25-6-4	UPC 721-1
ECM Appendix O	LDC 25-6-415	LDC 25-7
LDC 25-1	LDC 25-6-416	LDC 25-7-152
LDC 25-1-704	LDC 25-6-56	DCM 1-2-4-E
LDC 25-2	LDC 25-7-1	DCM 1-2-4
LDC 25-2-10	LDC 25-7-61	LDC 25-8-64
LDC 25-2-3-1	LDC 25-8-261	ECM 1-8
LDC 25-2-586	LDC 25-8-281	TCM 4
LDC 25-2-592	LDC 25-8-42	TCM 7
LDC 25-2-739	LDC 25-8-62	TCM 3
LDC 25-2-814	LDC 25-8-92	
LDC 25-2-837	UCM 1-14	
LDC 25-2-C	UCM 2-5-1	
LDC 25-2-E	UCM 2-9-1	

90

metric themes reviewed by 2+ specialties

Access	Features	Floors	Meters	Screening	Transit
Address	Critical Water	Flow	Parcels	Sedimentation	Trash
Backflow	Quality Zone	Foundations	Parking	Service	Trees
Bikes	Curbs	Gates	Pavements	Extension	Underground
Bridges	Design	Grading	Pedestrian	Request	Items
Buildings	Drainage	Impervious	Access	Sidewalks	Unified
Certification	Driveways	Cover	Phasing	Signs	Development
Channels	Easements	Intersections	Pipes	Site Area	Agreements
Clearance	Electrical	Irrigation	Planting	Slopes	Utilities
Climbing Risk	Clearance	Jurisdiction	Plats	Sprinklers	Valves
Connections	Electrical Lines	Land Use	Poles	Staging	Vegetation
Connectivity	Engineer's	Covenants	Ponds	Stations	Walls
Construction	Letter	Landscape	Pumps	Stormwater	Wastewater
Covenants	Equipment	Lanes	Rain	Streets	Water Meters
Cranes	Erosion	Licenses	Right of Way	Time of	Water Quality
Critical	Facilities	Lift Stations	Roads	Concentration	Wells
Environment	Fences	Lots	Runoff	Traffic	Zoning
	Floodplains			Trails	

Source: Site plan review document analysis (May-Jun 2023)

1. Metric themes are possible groupings of metric items that could be related to each other

2. Review documents not applicable for the Law and Communications & Technology departments

3. Excluding high-level code references such as "COA, UPC"



In 2021, reported days to approval was 228 days

Site plans: Days from Submission to Approval

Year	Commercial			Residential			Total Approved	Days to Approval	% Change
	Approved	Days to Approval	% Change	Approved	Days to Approval	% Change			
2008	145	219	...	6	251	...	151	220	...
2009	317	201	-8.39%	10	173	-30.90%	327	200	-9.18%
2010	209	222	10.62%	10	218	25.68%	219	222	10.83%
2011	256	236	6.35%	20	211	-3.11%	276	235	5.84%
2012	238	266	12.50%	13	288	36.62%	251	268	14.01%
2013	252	274	3.05%	22	325	12.76%	274	279	4.24%
2014	288	292	6.52%	28	352	8.35%	316	297	6.43%
2015	303	306	4.78%	31	336	-4.77%	334	308	3.67%
2016	326	324	5.88%	31	375	11.85%	357	328	6.42%
2017	319	344	6.29%	27	357	-4.91%	346	345	5.25%
2018	310	333	-3.31%	18	434	21.61%	328	339	-1.66%
2019	354	228	-31.31%	25	151	-65.28%	379	226	-33.23%
2020	113	363	58.73%	6	430	185.62%	119	368	62.69%
2021	159	228	-37.15%	12	224	-47.98%	171	228	-38.23%
	3,589	280		259	324		3,848	283	

Capitol Market Research, April 2022

site_plans.xls

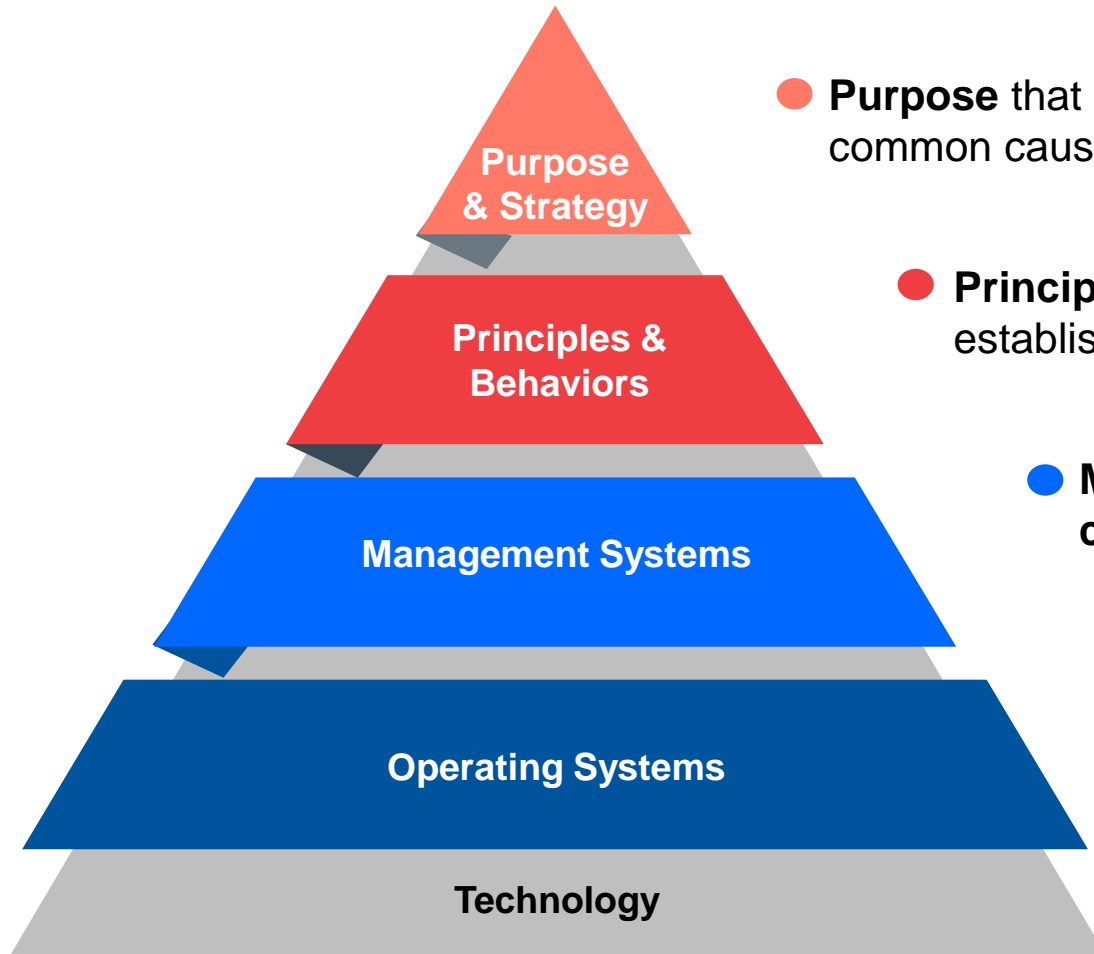
Data from City of Austin Development Department

Note: Dataset does not include "Approved" permits that were submitted prior to 2008.



The operational excellence survey and panel interviews assess organizational behaviors












The 5 core elements and how it is deployed



- **Purpose** that defines why the organization exists, creating a common cause; with a **Strategy to achieve it**
- **Principles and Behaviors** to achieve the strategic vision and establish a culture of **trust, respect, and constant innovation**
- **Management Systems** in place that **develop leaders, build competency and drive desired behaviors**
- **Operating Systems** that **eliminate waste and deliver value** to stakeholders
- **Technology** that **accelerates human capabilities** to continuously improve

41 specialties corresponding to 11 departments operate in silos with varying goals

Specialties and disciplines by department

Department	# of specialties / disciplines	Names of specialties / disciplines
 Energy	12	Public involvement and real estate services, distribution design, transmission engineering, power systems engineering, power systems planning, network, chilled water, electric system field operations, pole attachments, line clearance, forestry, and transmission construction
 Water	8	CIP and mobility, SER/land use, sites & sub-divisions, plumbing, onsite water reuse and benchmarking, infrastructure management (AULCC), pre-treatment/industrial waste, and facilities engineering services
 DSD	6	Intake, site plan review, drainage & water quality, environmental, tree review, and land management
 Watershed protection	3	Environmental, RSMP, and floodplain
 Public Works & Trans.	3	Public works, right of way, and AULCC
 Law	2	City attorney and paralegal
 Comms & Tech.	2	Addressing and mapping
 Planning	2	Urban design and historic preservation
 Fire	1	N/A
 Parks & Rec.	1	N/A
 Housing	1	N/A

Potential approach

Practices from site plan review processes in peer cities



Processes

- **Guided resources** to empower customer self-education including training pages, process maps, checklists, sample documents, etc.
- **Pre-submission meeting** for applicants
- **Unified electronic platform** including application submission, progress tracking transparency, notifications, requirements, etc.
- **Clear fee schedule** and electronic payment
- **Single point of contact** for applicant coordination
- **Assigned technical review committees** per application with a representative from each department on the team
- Regularly scheduled **inter- and intra- department meetings**
- **Annual report** for transparency, including timelines and satisfaction statistics



People

- Formalized **onboarding program**
- **Annual online or classroom training** regarding updated or new procedures or regulations
- **Use of third-parties** (consultants and/or contractors) for periods of higher volume
- Implementation and reinforcement of **continuous improvement principles** and practices



Structure

- **“One-stop shop”** and physical proximity of staff personnel
- Internal department teams **united under one department**
- Clear delineation / specialization of **roles and responsibilities**

Case study: A review of the City of Dallas offers insights into a comparable city's site plan process

Overview: A deep-dive review of the City of Dallas serves as a geographical comparison for Austin's site plan process. Dallas has implemented activities across the organization which serve as a compelling reference to guide possible solutions for Austin

Process

- YouTube channel available with various **applicant training resources and videos**
- **Staff available for consultation** via phone or email pre-submission
- **Pre-submission meetings** available to schedule; 6 weekly slots available — first come, first served
- **Project Coordinator** assigned upon receiving an application
- **Current city codes and ordinances** all published on city website
- **e-Plan portal**
 - Used to submit plans and documents
 - Contains video series walking through the processes
 - Provides downloadable fee estimator, permit fee examples, and PDF fee schedule
- **Concurrent review**
 - Site plan review is completed simultaneously with other permits when the permit is for new construction, additions or changes in use for other than 1- or 2-family construction
- **Q-TEAM:** Expedited building permit plan review
 - Costs additional \$500-\$1,250 plus \$1k per hour for the review time
 - Uses formalized agenda with goal to issue permit immediately following the meeting



People

- 250+ staff
- **Contact directory** posted online as PDF with job titles and contact information





Structure

- The Permit Center is a **“one-stop shop”** for information and services



Case study: A review of the City of San Diego offers insights into a comparable city’s site plan process

Overview: A deep-dive review of the City of San Diego serves as a population comparison for Austin’s site plan process. San Diego has implemented activities across the organization which serve as a compelling reference to guide possible solutions for Austin

Process	 People	 Structure
<ul style="list-style-type: none">• Staff available by phone, email, and in person to provide guidance on zoning regulations prior to submission• Optional pre-submission meeting allows staff to provide input on requirements, design, cost, and time estimates for the permit• Certain areas contain Site Plan Design Review Exemption Checklists, which allow for administrative approval of site plans without technical review when the proposed development is consistent with the checklist criteria• Single project manager assigned to application for duration of process• Applicants can request a Project Issue Resolution (PIR) Conference at any time in the process to discuss issues that were not able to be resolved at the project manager level with executive management and county project staff• PDS Planner is available to meet and discuss any comments or questions prior to resubmittal• Simple site plans process in 3-8 months, with complex site plans taking 1 year or longer	<ul style="list-style-type: none">• Site plan process administered by county of San Diego government, not city government	<ul style="list-style-type: none">• SD PDS determines which departments and jurisdictions need to review the proposal during the scoping process for the project

Case study: California Department of Motor Vehicles

Overview: The state deployed a design thinking methodology to rapidly prototype improvement solutions and drive tangible customer experience transformation. California's approach could serve as a compelling reference to guide possible solutions for Austin



Client context

CA DMV's **customer experience** outcome challenges stemmed from underlying challenges

- Excessive **wait times**
- **Limited available appointments** within 3 months
- Surge in customer demand projected (due to new external mandates)
- Ongoing negative headlines and news stories affecting **citizen perception** of government experiences broadly



Approach

- **Discover:** Build a robust fact base to inform solution hypotheses through customer segmentation, design research, employee engagement, and analyzing operational data
- **Design:** Prototype solution hypotheses to validate impact and prioritization and sequence delivery in field
- **Deliver:** Execute prototypes in the field with test and learn cycles to rapidly iterate and implement sustainable solutions



Impact

- Alignment on the key customer experience challenges and opportunities for **near-term improvement**
- Real execution impact within short time, including early wins that do **not involve changing major policies** or touching underlying technology (while building the foundation for broader modernization)
- New ways of working across the team, including **cross-functional collaboration and agile working capabilities**
- Execution roadmap for continued transformation with real commitment from DMV leadership

Case study: Arizona State government – building a digital “one-stop shop”

Overview: The state leveraged existing technology platform and deployed design thinking methodology to improve business owner experience. Arizona's approach could serve as a compelling reference to guide possible solutions for Austin



Client context

- Arizona State government was focusing on improving economic competitiveness of the state and increasing the ease of doing business
- The agency wanted to **improve business owner experience** in planning, starting, maintaining and closing the business
- The agency also wanted to ensure that **current processes, technology and people are aligned to deliver** that experience to the business owners



Approach

The state utilized a **six-step approach** to design and outline requirements for **a new digital product** in the public sector

- Setting aspiration
- Identifying changes required for journey implementation
- Developing execution plan
- Mapping citizen journey
- Evaluating technology environment
- Assessing cost



Impact

- Developed and aligned departments on the **product vision and aspiration**
- Designed the current and ideal future state of the journeys through **design thinking workshop**
- Identified the **existing technology platform that can be leveraged** to build the portal instead of building from scratch or buying 3rd party applications

Potential people and organization initiatives

As of 6/15/23

■ Speed of the process
 ■ Quality of experience
 ■ Critical enablers
 ■ quick wins

Theme	Initiative	Time to realize	Ease of implementation						Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)	Investment	Interdepartmental complexities	Code regulation involvement	Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Revamp people strategy	1 Establish gold standard training ground	Long-term	Unfamiliar	1,000+ hours	10-40 hours	\$100k-1M	High Collaboration	Involving code as part of a process	101-1000	6	2
	2 Staff incentives aligned with process goals	Intermediate term	Unfamiliar	250-500 hours	0 hours	\$100k-1M	High Collaboration	No involvement or change of code	1-10	0	0
	3 Optimize hiring methodology	Near-term	Unfamiliar	100-250 hours	0 hours	\$0k-1k	High Collaboration	No involvement or change of code	0	1	0
	4 Contractors/ temps for site plan reviews	quick win	Familiar-Unfamiliar	0-100 hours	1-10 hours	\$1M+	High Collaboration	No involvement or change of code	0	2	2
Evaluate organization design & culture	5 Evaluate organization design	Near-term	Unfamiliar-Uncertain	1,000+ hours	0 hours	\$100k-1M	High Collaboration	No involvement or change of code	0	4	2
	6 Align Site Plan reviewers on their primary mission and customer	quick win	Unfamiliar-Uncertain	250-500 hours	1-10 hours	\$0k-1k	High Collaboration	No involvement or change of code	1-10	3	3
Foster continuous improvement	7 Cadenced inter and intra departmental meetings to discuss continuous improvement	quick win	Unfamiliar	100-250 hours	40-80 hours	\$0k-1k	High Collaboration	No involvement or change of code	1-10	5	3
	8 Enhanced centralized process around KPIs within and across departments	Near-term	Unfamiliar	500-1,000 hours	10-40 hours	\$0k-1k	High Collaboration	Involving code as part of a process	1-10	3	1

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted

2. Number of CX drivers impacted



Potential process initiatives (1/3)

As of 6/15/23

■ Speed of the process
 ■ Quality of experience
 ■ Critical enablers
 ■ quick wins

Theme	Initiative	Time to realize	Ease of implementation			Investment	Interdepartmental complexities	Code regulation involvement	Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)				Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Standardize inconsistent process activities	9 Rationalize fee schedule	Near-term	Unfamiliar	250-500 hours	1-10 hours	\$0k-1k	High Collaboration	No involvement or change of code	1-10	2	3
	10 Implement customer service best practices (e.g., turn camera/video on, accessibility)	quick win	Familiar-Unfamiliar	0-100 hours	0 hours	\$0k-1k	High Collaboration	No involvement or change of code	0	1	1
	11 Consolidated review team for completeness check	Intermediate term	Unfamiliar-Uncertain	250-500 hours	0 hours	\$0k-1k	High Collaboration	Involving code as part of a process	1-10	3	1
	12 Empower the case manager and ensure consistency in case manager assignments	quick win	Familiar-Unfamiliar	100-250 hours	0 hours	\$0k-1k	No Collaboration	No involvement or change of code	1-10	4	3
	13 Formalize and publish permit signing order	quick win	Familiar-Unfamiliar	0-100 hours	0 hours	\$0k-1k	Limited Collaboration	No involvement or change of code	1-10	2	2
	14 Standardize site plan formal review activities	quick win	Familiar-Unfamiliar	0-100 hours	0 hours	\$0k-1k	High Collaboration	No involvement or change of code	1-10	2	2
	15 Formalize pre-submission meetings	Near-term	Familiar-Unfamiliar	250-500 hours	10-40 hours	\$0k-1k	High Collaboration	Involving code as part of a process	11-100	5	3
	16 Recalibrate completeness check	Near-term	Unfamiliar	500-1,000 hours	0 hours	\$0k-1k	High Collaboration	Involving code as part of a process	11-100	2	3
	17 Improve Master Comment Report format	Intermediate term	Unfamiliar	250-500 hours	1-10 hours	\$10k-100k	High Collaboration	Involving code as part of technology	11-100	2	3
	18 Prioritize application by tiers	quick win	Unfamiliar	100-250 hours	0 hours	\$0k-1k	High Collaboration	No involvement or change of code	0	0	2
	19 Formalize "re-review" process if/when department reviewers change	quick win	Familiar-Unfamiliar	0-100 hours	0 hours	\$0k-1k	High Collaboration	Involving code as part of a process	11-100	1	2

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted

2. Number of CX drivers impacted



Potential process initiatives (2/3)

As of 6/15/23

■ Speed of the process
 ■ Quality of experience
 ■ Critical enablers
 ■ quick wins

Theme	Initiative	Time to realize	Ease of implementation			Investment	Interdepartmental complexities	Code regulation involvement	Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)				Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Standardize inconsistent process activities	20 Improve internal and external conflict resolution process	Near-term	Familiar-Unfamiliar	250-500 hours	10-40 hours	\$0k-1k	High Collaboration	Involving code as part of process	101-1000	4	3
	21 Formalize post-first review cycle meetings	Near-term	Familiar-Unfamiliar	250-500 hours	10-40 hours	\$0k-1k	High Collaboration	Involving code as part of process	11-100	4	2
Formalize code/regulation & metric management	22 Determine and map overlapping codes/regulations and metrics	Near-term	Unfamiliar-Uncertain	500-1,000 hours	1-10 hours	\$0k-1k	High Collaboration	Involving code as part of a process	0	3	1
	23 Rationalize / refine / consolidate code criteria manual(s) and publicize interpretation(s)	Intermediate term	Unfamiliar	1,000+ hours	10-40 hours	\$0k-1k	High Collaboration	Change of criteria manual(s) interpretation	101-1000	5	3
	24 Formalize approach around LDC additions/changes	Near-term	Unfamiliar	100-250 hours	1-10 hours	\$0k-1k	High Collaboration	Change of criteria manual(s) interpretation	1-10	2	3
Enhance customer education resources & ownership	25 Enhance application wizard (questionnaire) that exists as part of the City of Austin website	Near-term	Familiar	100-250 hours	1-10 hours	\$0k-1k	High Collaboration	Involving code as part of a process	0	5	4
	26 Application training resources	Intermediate term	Familiar-Unfamiliar	250-500 hours	1-10 hours	\$0k-1k	High Collaboration	Involving code as part of a process	1-10	4	2
	27 Implement applicant attestation of Site Plan completeness and accuracy upon intake	quick win	Unfamiliar	100-250 hours	1-10 hours	\$0k-1k	No Collaboration	No involvement or change of code	11-100	2	2

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted

2. Number of CX drivers impacted



Potential process initiatives (3/3)

As of 6/15/23

■ Speed of the process
 ■ Quality of experience
 ■ Critical enablers
 ■ quick wins

Theme	Initiative	Time to realize	Ease of implementation			Investment	Interdepartmental complexities	Code regulation involvement	Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)				Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Improve process efficiency	28 Cadenced inter and intra departmental meetings to discuss ongoing applications	quick win	Unfamiliar	100-250 hours	40-80 hours	\$0k-1k	High Collaboration	Involving code as part of a process	11-100	5	3
	29 Scheduling (office hours/rotating customer meetings days)	Near-term	Unfamiliar	100-250 hours	10-40 hours	\$0k-1k	High Collaboration	No involvement or change of code	11-100	3	3
	30 Provide rolling draft comments to applicant	Near-term	Unfamiliar	500-1,000 hours	10-40 hours	\$0k-1k	High Collaboration	Involving code as part of a process	11-100	0	2
	31 Applicant ability to self-certify (w/potential fee)	Long-term	Unfamiliar-Uncertain	1,000+ hours	40-80 hours	\$10k-100k	High Collaboration	Involving code as part of a process	1001+	6	4

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted

2. Number of CX drivers impacted



Potential technology initiatives (1/2)

As of 6/15/23

■ Speed of the process
 ■ Quality of experience
 ■ Critical enablers
 ■ quick wins

Theme	Initiative	Time to realize	Ease of implementation			Investment	Interdepartmental complexities	Code regulation involvement	Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)				Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Upgrade internal/ external system of record/ platform	32 Enhance & ensure consistent use of internal system of record	Intermediate term	Unfamiliar-Uncertain	1,000+ hours	10-40 hours	\$1M+	High Collaboration	Involving code as part of technology	101-1000	4	3
	33 Enhance customer facing portal	Intermediate term	Unfamiliar	500-1,000 hours	10-40 hours	\$1M+	High Collaboration	Involving code as part of technology	11-100	3	2
Automate E2E Site Plan activities	34 Enhance application wizard (questionnaire) that is linked and a part of the site plan application process	Intermediate term	Familiar-Unfamiliar	100-250 hours	1-10 hours	\$1k-10k	No Collaboration	Involving code as part of technology	11-100	0	0
	35 Automate required documents at submission	Near-term	Familiar-Unfamiliar	100-250 hours	1-10 hours	\$0k-1k	No Collaboration	No involvement or change of code	1-10	4	3
	36 Digitize signature process	Intermediate term	Unfamiliar	500-1,000 hours	1-10 hours	\$100k-1M	Limited Collaboration	Council change required	11-100	2	1
	37 Automate/ integrate application entry to system of record	Intermediate term	Familiar-Unfamiliar	250-500 hours	1-10 hours	\$10k-100k	No Collaboration	No involvement or change of code	1-10	3	1
	38 CRM system to auto-capture communications	Intermediate term	Unfamiliar	250-500 hours	1-10 hours	\$10k-100k	High Collaboration	No involvement or change of code	1-10	2	2
	39 Automate fee calculation and posting	Intermediate term	Familiar-Unfamiliar	500-1,000 hours	1-10 hours	\$10k-100k	High Collaboration	No involvement or change of code	1-10	2	2

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted

2. Number of CX drivers impacted



Potential technology initiatives (2/2)

As of 6/15/23

Speed of the process Quality of experience Critical enablers quick wins

Theme	Initiative	Time to realize	Ease of implementation			Investment	Interdepartmental complexities	Code regulation involvement	Size of impact		
			Level of uncertainty	Level of effort (tot. impl.)	Level of effort (wkly on-going)				Cycle time (tot. hrs)	8 wastes ¹	CX drivers ²
Digitize application review steps (AI assisted)	40 AI digitized completeness check	Intermediate term	Unfamiliar	1,000+ hours	1-10 hours	\$1M+	High Collaboration	Involving code as part of technology	11-100	4	1
	41 AI digitized formal review	Long-term	Uncertain	1,000+ hours	40-80 hours	\$1M+	High Collaboration	Involving code as part of technology	1001+	4	2

Source: Customer workshops (5/12, 5/16, and 6/13), DSD + Partner Departments workshop (6/01)

1. Number of wastes impacted
2. Number of CX drivers impacted

























Draft initiative charters were developed for potential quick wins

quick wins

Critical enablers	Quality of experience	Speed of the process
<p>Initiatives that enable other initiatives</p> <ul style="list-style-type: none"> 1 Establish gold standard training ground 6 Align Site Plan reviewers on their primary mission and customer 2 Staff incentives aligned with process goals 5 Evaluate organization design 7 Cadenced inter and intra departmental meetings to discuss continuous improvement 8 Enhanced centralized process around KPIs within and across departments 22 Determine and map overlapping codes/regulations and metrics 23 Rationalize / refine / consolidate code criteria manual(s) and publicize interpretation(s) 32 Enhance & ensure consistent use of internal system of record 	<p>Initiatives designed to enhance experience of staff and applicants</p> <ul style="list-style-type: none"> 3 Optimize hiring methodology 9 Rationalize fee schedule 10 Implement customer service best practices (e.g., turn camera/video on, accessibility) 11 Consolidated review team for completeness check 12 Empower the case manager and ensure consistency in case manager assignments 13 Formalize and publish permit signing order 16 Recalibrate completeness check 17 Improve Master Comment Report format 18 Prioritize application by tiers 19 Formalize "re-review" process if/when department reviewers change 20 Improve internal and external conflict resolution process 24 Formalize approach around LDC additions/changes 25 Enhance application wizard (questionnaire) that exists as part of the City of Austin website 26 Application training resources 27 Implement applicant attestation of Site Plan completeness and accuracy upon intake 28 Cadenced inter and intra departmental meetings to discuss ongoing applications 33 Enhance customer facing portal 39 Automate fee calculation and posting 	<p>Initiatives that facilitate faster process execution</p> <ul style="list-style-type: none"> 4 Contractors/ temps for site plan reviews 14 Standardize site plan formal review activities 15 Formalize pre-submission meetings 21 Formalize post-first review cycle meetings 29 Scheduling (office hours/rotating customer meetings days) 30 Provide rolling draft comments to applicant 31 Applicant ability to self-certify (w/potential fee) 34 Enhance application wizard (questionnaire) that is linked and a part of the site plan application process 35 Automate required documents at submission 36 Digitize signature process 37 Automate/ integrate application entry to system of record 38 CRM system to auto-capture communications 40 AI digitized completeness check 41 AI digitized formal review

4 Contractors / temps for Site Plan reviews

		Quality of experience	Critical enabler	Speed of the process																													
Initiative overview 	Develop a standard regarding when/how to utilize contractors/temps (consider periods of unforeseen volume)	Baseline/ current state  <ul style="list-style-type: none">Few departments currently utilize 3rd party workers																															
Success measures 	<ul style="list-style-type: none">[Implementation] Amount of time to onboard contractors[Performance] Processing time reduction[Performance] Application backlog reduction[Performance] Customer satisfaction of Site Plans reviewed by contractors	Core Team  <p>Initiative owner: DSD</p> <p>Working team: DSD and Partner departments utilizing 3rd party workers</p> <p>External stakeholders: 3rd parties</p>																															
Milestones 	<ul style="list-style-type: none">Discover recurring trends in the duration of application processingDetermine the departments that would benefit from contractors/tempsIdentify the responsible department for initiating contractor recruitment, hiring, and trainingEvaluate effectiveness of contractors/ temps for Site Plan reviews	Dependencies with other initiatives  <ul style="list-style-type: none">N/A																															
Ease of implementation 	<ul style="list-style-type: none">Level of uncertainty: Familiar-unfamiliarLevel of effort (hours):<ul style="list-style-type: none">Implementation (total): 0-100On-going (weekly): 1- 10Investment: \$1M+Collaboration: High collaborationCode regulation: No involvement or change of code	<table><tr><td rowspan="2">Initiative Timeline </td><td colspan="2">2023</td><td colspan="2">2024</td></tr><tr><td>Q3</td><td>Q4</td><td colspan="2">Q1</td></tr><tr><td>Trend analysis</td><td colspan="2"></td><td colspan="2"></td></tr><tr><td>RFP for contractors</td><td colspan="2"></td><td colspan="2"></td></tr><tr><td>Create training material & train new hires/ contractors</td><td colspan="4"></td></tr><tr><td>Evaluate effectiveness of contractors</td><td colspan="2"></td><td colspan="2"></td></tr></table>			Initiative Timeline 	2023		2024		Q3	Q4	Q1		Trend analysis					RFP for contractors					Create training material & train new hires/ contractors					Evaluate effectiveness of contractors				
Initiative Timeline 	2023		2024																														
	Q3	Q4	Q1																														
Trend analysis																																	
RFP for contractors																																	
Create training material & train new hires/ contractors																																	
Evaluate effectiveness of contractors																																	

6 Align Site Plan reviewers on their primary mission and customer

customer

Quality of experience

Critical enabler

Speed of the process

Initiative overview

One City voice and alignment on the goal of site plans and the customers of site plans

Baseline/ current state

Departments across the City maintain different views of the primary customer and the purpose of the site plan process, leading to inconsistent communications with customers and ineffective prioritization

Success measures

[Implementation] Mission alignment & employee engagement

Performance metrics

Core Team

Initiative owner: DSD + Partner Departments

Working team:

Milestones

Identify the different organization's mission and values to define the primary mission for all the departments

Evaluate for common themes and consistency

Align on singular mission/vision for all departments

Dependencies with other initiatives

...

Ease of implementation

Level of uncertainty: Unfamiliar - uncertain

Level of effort (hours):

Implementation (total): 250-500

On-going (weekly): 1-10

Investment: \$10-100k

Collaboration: High collaboration

Code regulation: No involvement or change of code

Initiative Timeline

Assess missions and visions of the different departments

2023

Q2

Q3

Q4

09/01

7 Cadenced inter- and intra- departmental meetings to discuss continuous improvement

Quality of experience

Critical enabler

Speed of the process

Initiative overview



City staff to contribute innovative ideas, share best practices, and collaborate on improving existing processes and workflows. Implementing a continuous improvement framework, organizations can drive a culture of innovation, enhance operational efficiency, and achieve sustainable growth.

Baseline/ current state



- No meetings between leaders or front-line teams of different DSD disciplines & partner departments exist

Success measures



- [Implementation] Attendance of identified individuals at cadenced meetings
- [Performance] Reduction in number of formal reviews
- [Performance] Decrease in site plan variance, etc.
- [Performance] Increase in customer service ratings

Core Team



Initiative owner: DSD

Working team: DSD + select partner departments (specific people to be outlined)

Milestones



- Identify and compile a list of departments to be included
- Schedule and coordinate the first meeting to kickstart meetings
- Establish a regular cadence for future meetings to ensure ongoing collaboration and progress

Dependencies with other initiatives



N/A

Ease of implementation



- Level of uncertainty: Unfamiliar
- Level of effort (hours):
 - Implementation (total): 100-250
 - On-going (weekly): 40-80
- Investment: \$0-1k
- Collaboration: High collaboration
- Code regulation: No involvement or change of code

Initiative Timeline



2023

Q2

Q3

Identify agenda & departments for meetings



▲
07/08

Schedule and coordinate first meeting



▲
07/31

Establish cadence and publish to departments



▲
08/16

10 Implement customer service best practices (e.g., turn camera/video on, accessibility)

Quality of experience

Critical enabler

Speed of the process

Initiative overview



Create a protocol that dictates the use of camera/video when meeting with customers/applicants that is consistently followed by all departments.

Baseline/ current state



- During conversations with applicants, only a few departments or individuals choose to have their cameras turned on

Success measures



- [Performance] Increase in customer service ratings

Core Team



Initiative owner: DSD

Working team: DSD

Milestones



- Develop and communicate a clear guideline on camera usage during applicant calls
- Provide training and resources to staff on the benefits and best practices of using cameras during customer calls
- Continuously refine and improve the camera usage guideline and training based on feedback and evolving needs

Dependencies with other initiatives



N/A

Ease of implementation



- Level of uncertainty: Familiar-unfamiliar
- Level of effort (hours):
 - Implementation (total): 0-100
 - On-going (weekly): 0
- Investment: \$0-1k
- Collaboration: High collaboration
- Code regulation: No involvement or change of code

Initiative Timeline



2023

Q2

Q3

Establish guidelines on camera usage



Create best practice / fact sheets for camera usage



Refine and improve camera/ customer service guidelines



12 Empower the case manager and ensure consistency in case manager assignments

Quality of experience

Critical enabler

Speed of the process

Initiative overview



A dedicated case manager should be assigned to each applicant throughout their Site Plan journey to ensure continuity, personalized support, and effective coordination of services. This builds the applicant-city relationship and allows for a reliable point of contact. Understanding that turnover and PTO are inevitable, proactive and clear communication should be sent to applicants if case managers do change.

Baseline/ current state



- The case managers frequently change throughout the Site Plan process

Success measures



- [Implementation] Pilot 10-15 site plan reviews where case manager does not change
- [Performance] Increase in customer service ratings
- [Performance] Improvement in workload balance

Core Team



Initiative owner: DSD

Working team: DSD SP

Milestones



- Design and develop a standardized review workflow that assigns a dedicated reviewer to each applicant
- Establish clear guidelines and criteria for selecting and assigning dedicated reviewers to ensure a fair and efficient allocation process
- Pilot the new approach with a select group of applicants to gather feedback and make necessary adjustments before scaling

Dependencies with other initiatives



N/A

Ease of implementation



- Level of uncertainty: Familiar-unfamiliar
- Level of effort (hours):
 - Implementation (total): 100-250
 - On-going (weekly): 0
- Investment: \$0-1k
- Collaboration: No collaboration
- Code regulation: No involvement or change of code

Initiative Timeline



2023

Q2

Q3

Design a standardized workflow for case manager assignment

06/20

Pilot with select customers/site plans

07/07

Analyze data

07/19

Scale case manager workflow

09/28

13 Formalize and publish permit signing order

Quality of experience

Critical enabler

Speed of the process

Initiative overview



Create a protocol that dictates the permit signing order based on discussions with all departments. Publish the signing order for applicants to know. Alternatively, determine that no such signing order is needed and create a protocol that departments can sign the permit simultaneously and not dependently on other departments (Legal being an exception).

Baseline/ current state



- Existing signing order that has dependencies with multiple departments

Success measures



- [Performance] Decrease in average time for all required signatures to be obtained
- [Performance] Increase in customer service ratings
- [Performance] Decrease in waiting time for Site Plan signatures

Core Team



Initiative owner: Partner Departments (e.g., AW IW, AW, AFD)

Working team: Partner Departments + DSD

External stakeholders: Applicant

Milestones



- Streamline the documentation and paperwork involved in the signing order process to minimize redundancy and ensure clarity
- Implement a tracking system to monitor the progress of the signing order and ensure timely handoffs between signatories
- Improve coordination and collaboration among different departments involved in the signing order to minimize delays and bottlenecks

Dependencies with other initiatives



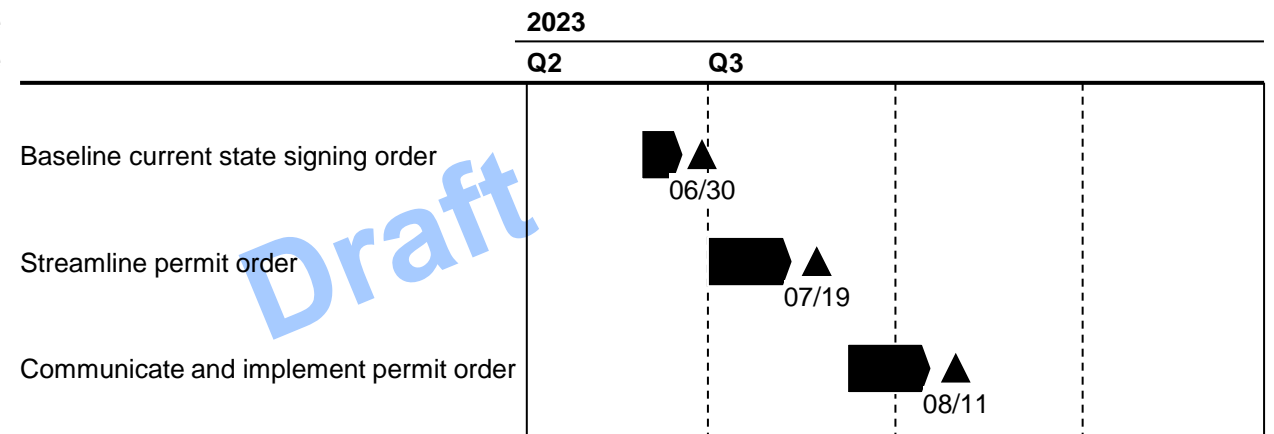
N/A

Ease of implementation



- Level of uncertainty: Familiar-unfamiliar
- Level of effort (hours):
 - Implementation (total): 0-100
 - On-going (weekly): 0
- Investment: \$0-1k
- Collaboration: Limited collaboration
- Code regulation: No involvement or change in code

Initiative Timeline



14 Standardize site plan formal review activities

Quality of experience

Critical enabler

Speed of the process

Initiative overview



Create a protocol that is consistently followed by all departments that dictates the use of "informal update" and overall approval order/structure (or lack thereof). Additionally, evaluate impact of new comments in late cycles that aren't regarding health, safety, and welfare. Processes such as license agreement to be consolidated to same department reviewer.

Baseline/ current state



- Mixed usage of Site Plan statuses in AMANDA

Success measures



- [Data analytics] Refined understanding of Site Plan process cycle time
- [Performance] Consistency of status usage across reviewers
- [Performance] Reduced communication time and improved clarity

Core Team



Initiative owner: DSD

Working team: DSD + Partner Departments

Milestones



- Analyze the specific requirements and needs of the organization to determine the ideal set of standardized statuses
- Create a clear and concise documentation or guide that outlines the meaning and appropriate usage of each standardized status
- Communicate and educate staff about the standardized statuses, emphasizing the importance of consistent usage and providing training if necessary

Dependencies with other initiatives



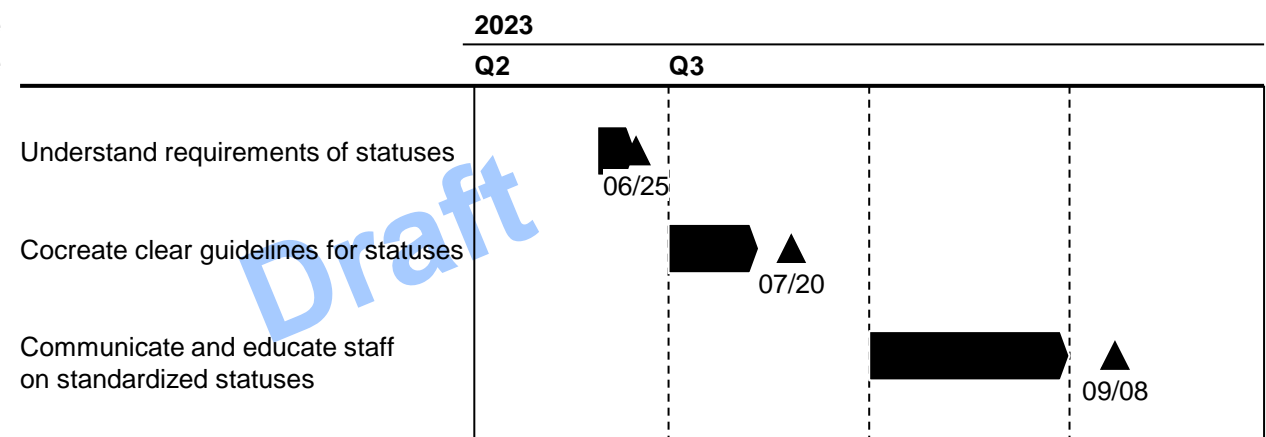
N/A

Ease of implementation











- Level of uncertainty: Familiar-unfamiliar
- Level of effort (hours):
 - Implementation (total): 0-100
 - On-going (weekly): 0
- Investment: \$0-1k
- Collaboration: High collaboration
- Code regulation: No involvement or change in code

Initiative Timeline



18 Prioritize application by tiers

		Quality of experience	Critical enabler	Speed of the process															
<div>Initiative overview</div> <div></div> <div>Collaborating with relevant stakeholders, such as DSD, partner departments, and City personnel, the goal is to establish prioritization tiers (e.g., 1 to 5). These tiers will be determined based on various factors such as permit type, presence of affordable housing, commercial property involvement, proximity to completion, site plan location, and client name. The prioritization tiers will be documented and shared internally to ensure consistency in site plan reviews. Additionally, they will be made available externally to provide customers with transparency regarding their respective situations.</div>	<div>Baseline/ current state</div> <div></div> <div><ul style="list-style-type: none">The prioritization of site plans is currently inconsistent and not shared among stakeholders</div>																		
<div>Success measures</div> <div></div> <div><ul style="list-style-type: none">[Performance] Reduction in turnaround time for higher priority tiers[Performance] Ability to predict processing time based on assigned tier</div>	<div>Core Team</div> <div></div> <div><div>Initiative owner: DSD</div><div>Working team: DSD + Partner Departments</div><div>External stakeholders: Applicants</div></div>																		
<div>Milestones</div> <div></div> <div><ul style="list-style-type: none">Identify and engage relevant stakeholders (e.g., DSD, partner departments, and City personnel) to establish collaboration channels and initiate discussions on the prioritization tiersCollaboratively define and establish the prioritization tiers (e.g., 1 to 5) based on the identified criteria, ensuring consensus among stakeholdersInternally share the finalized prioritization tiers documentation among relevant departments and personnel to ensure consistency in site plan reviews and decision-making processes</div>	<div>Dependencies with other initiatives</div> <div></div> <div><ul style="list-style-type: none">N/A</div>																		
<div>Ease of implementation</div> <div></div> <div><ul style="list-style-type: none">Level of uncertainty: UnfamiliarLevel of effort (hours):<ul style="list-style-type: none">Implementation (total): 100-250On-going (weekly): 0Investment: \$0-1kCollaboration: High collaborationCode regulation: No involvement or change of code</div>	<div>Initiative Timeline</div> <div></div> <div><table><tr><th></th><th colspan="2">2023</th></tr><tr><th></th><th>Q3</th><th>Q4</th></tr><tr><td>Identify and engage relevant stakeholders</td><td><div><div></div><div>08/01</div></div></td><td></td></tr><tr><td>Define and establish prioritization tiers</td><td></td><td><div><div></div><div>10/01</div></div></td></tr><tr><td>Share relevant documentation</td><td></td><td><div><div></div><div>10/16</div></div></td></tr></table></div>					2023			Q3	Q4	Identify and engage relevant stakeholders	<div><div></div><div>08/01</div></div>		Define and establish prioritization tiers		<div><div></div><div>10/01</div></div>	Share relevant documentation		<div><div></div><div>10/16</div></div>
	2023																		
	Q3	Q4																	
Identify and engage relevant stakeholders	<div><div></div><div>08/01</div></div>																		
Define and establish prioritization tiers		<div><div></div><div>10/01</div></div>																	
Share relevant documentation		<div><div></div><div>10/16</div></div>																	

19 Formalize "re-review" process if/when department reviewers change

Quality of experience

Critical enabler

Speed of the process

Initiative overview



Create a protocol that is applied consistently across all departments. This protocol would state that a second (or third, etc.) start-to-finish review should not be performed of a given application within a specialty. If a different reviewer is assigned to an application already in progress, the review should build on review comments left by the first reviewer. Exceptions could include... how far the first review was along, the quality of that review/reviewer, if a material item was missed, etc.

Baseline/ current state



- Protocol/ standardization for re-review does not exist

Success measures



- [Performance] Review time reduction
- [Performance] Higher completion rate

Core Team



Initiative owner: DSD

Working team: DSD + Partner departments

Milestones



- Define clear guidelines and standards for documenting the review progress and outcomes, ensuring that the information left by the initial reviewer is well-structured and easily accessible to subsequent reviewers
- Define new operating procedures to guide reviewers to focus on the current status and not re-review the application from the beginning, when reviewers change on current case

Dependencies with other initiatives



Ease of implementation



- Level of uncertainty: Familiar-unfamiliar
- Level of effort (hours):
 - Implementation (total): 0-100
 - On-going (weekly): 0
- Investment: \$0-1k
- Collaboration: High collaboration
- Code regulation: Involving code as part of the process

Initiative Timeline



	2023		2024	
	Q3	Q4	Q1	Q2
Define guidelines for documenting review progress	09/01			
Clarify operating procedures when reviewers change		11/01		

27 Implement applicant attestation of Site Plan completeness and accuracy upon intake

Quality of experience

Critical enabler

Speed of the process

Initiative overview



A process by which the City can ensure thoroughness in the intake of applications

Baseline/ current state



- No process to ensure an applicant has submitted a complete and accurate Site Plan

Success measures



- [Implementation] Compliance rate; number of applicants that follow procedure
- [Performance] Application accuracy through number of formal review rounds

Core Team



Initiative owner: DSD

Working team: DSD

External stakeholders: Applicants

Milestones



- Define the requirements and standards for a complete and accurate permit application, including all necessary documentation, information, and forms
- Develop a standardized attestation statement that clearly outlines the applicant's responsibility to ensure the completeness and accuracy of the Site Plan application
- Incorporate the attestation statement into the formal review round, requiring applicants to review and sign it as part of the formal submission process

Dependencies with other initiatives

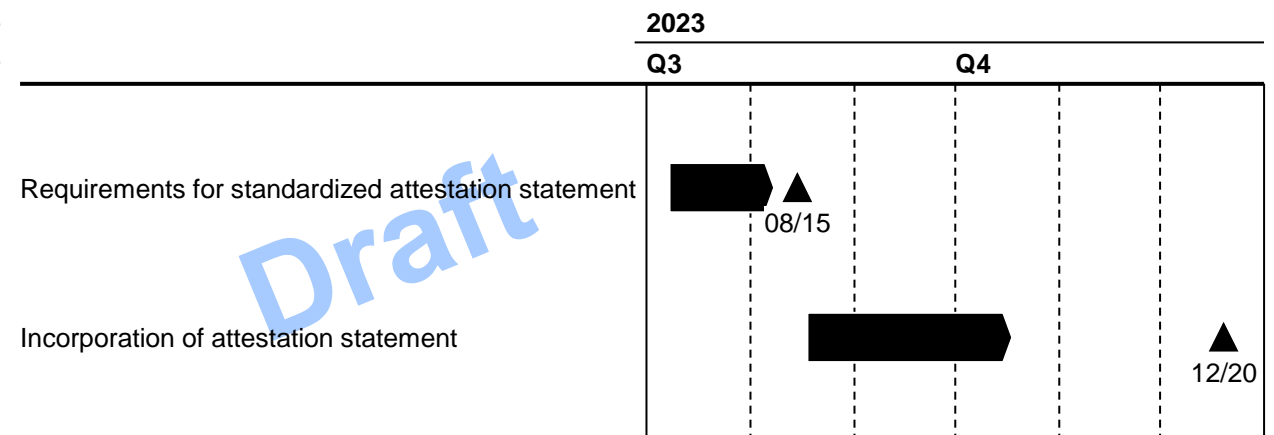


Ease of implementation



- Level of uncertainty: Unfamiliar
- Level of effort (hours):
 - Implementation (total): 100-250
 - On-going (weekly): 1-10
- Investment: \$0-1k
- Collaboration: No collaboration
- Code regulation: No involvement or change in code

Initiative Timeline



28 Cadenced inter and intra departmental meetings to discuss ongoing applications

Quality of experience

Critical enabler

Speed of the process

Initiative overview



Cadenced meetings to facilitate effective communication and collaboration between departments when discussing applications that impact their respective areas.

Once an application enters formal review and specialties are officially assigned, a regular/cadenced meeting should be set between applicable reviewers to ensure alignment in review, interpretation, prioritization, and timeline.

Baseline/ current state



- Currently no inter and intra departmental meetings exist to discuss ongoing applications

Success measures



- [Implementation] Attendance of identified individuals at cadenced meetings
- [Performance] Increase in application quality
- [Performance] Reduction in number of formal reviews
- [Performance] Decrease in site plan variance, etc.

Core Team



Initiative owner: DSD

Working team: DSD + Partner Departments

External stakeholders: Telecom companies (e.g., AULCC)

Milestones



- Identify and compile a list of departments to be included
- Schedule and coordinate the first meeting to kickstart meetings
- Establish a regular cadence for future meetings to ensure ongoing collaboration and progress

Dependencies with other initiatives



N/A

Ease of implementation



- Level of uncertainty: Unfamiliar
- Level of effort (hours):
 - Implementation (total): 100-250
 - On-going (weekly): 40-80
- Investment: \$0-1k
- Collaboration: High collaboration
- Code regulation: Involving code as part of the process

Initiative Timeline



2023

Q3

Identify list of departments

07/14

Schedule and coordinate kickoff meeting

08/15

Establish regular cadence for future meetings

09/14