



PERMIT CENTER STRATEGIC PROJECTS

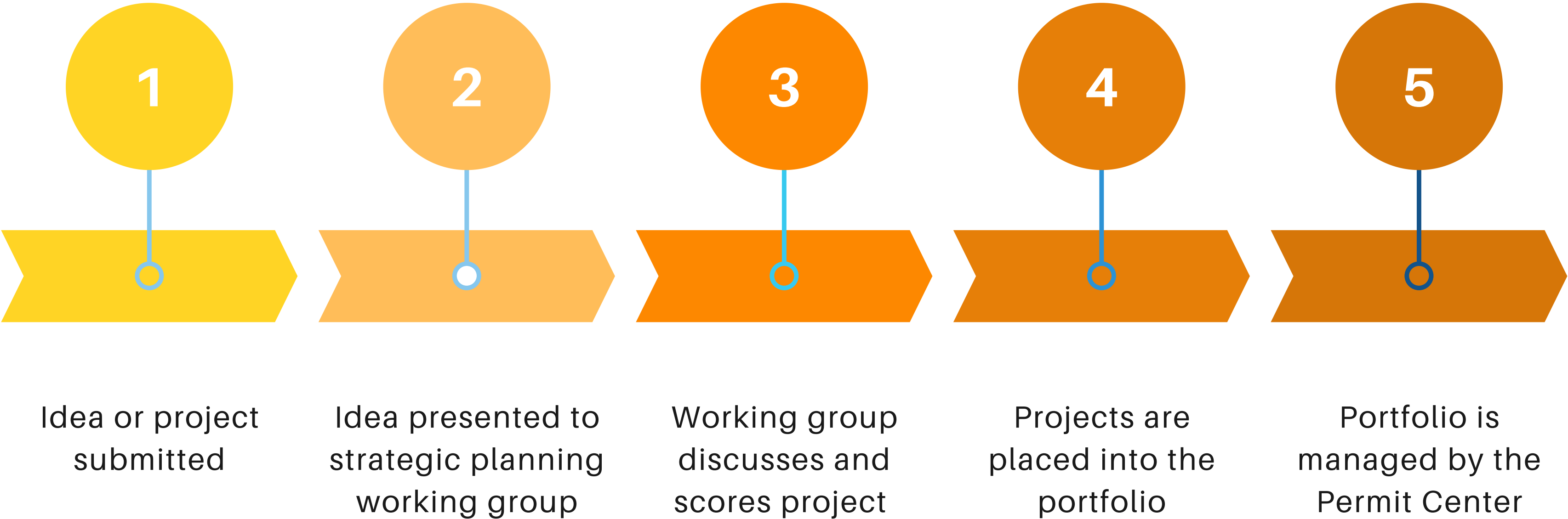
Fiscal Year 22-23

COIT Presentation
March 4, 2022

Overview of the strategic technology projects for
permitting improvements

OVERVIEW OF STRATEGIC PROJECT SELECTION

Permitting stakeholders make up the
Strategic Planning Working Group



Evaluation criteria

[MS form link](#)

Customer experience	How does this project improve the customer experience?
Process improvement	How does this project centralize and streamline services?
Transparency	How does this project increase data transparency, accountability, and accessibility to the public?
Public impact	What is the range of stakeholders who will benefit from this project?
Mandate	Is this project mandated by law, regulation, or audit?
Risk of <u>not</u> doing	How does a delay to starting this project affect Permit Center operations?
Benefit-cost analysis	What is the expected net benefit of this project?



Permit Center - Project Evaluation

Overview

Click here to view or download Project Requests: <https://sfgov1.sharepoint.com/:f:/s/ADM-PermitCenterTeam/EoUuri8QCI5Kqk17XdQE57IB45ipKo5yzyLpinB7-6sASQ?e=CR1frh>

1. Project you are evaluating *

- ☐ Transparent permit process times (a.k.a., backlogs)
- ☐ Standardize routing (G-20)
- ☐ Interim plan versions
- ☐ Digitize SFUSD fees
- ☐ Centralize with Zendesk

2. Your name *

Enter your answer

Enter your answer

Evaluation Criteria

3. CUSTOMER EXPERIENCE:

How does this project improve the customer experience? *

- ☐ 0 - May indirectly improve
- ☐ 1 - Will drive meaningful improvements
- ☐ 2 - Will drive substantial, measurable improvements

Workgroup Members

Members



Office of the Mayor



New Member

Advisory



City Performance

The projects

After reviewing 40+ projects, the working group identified four viable projects to begin in fiscal year 22-23.



BUSINESS PLATFORM



CONSTRUCTION DATA



DIGITAL BUILDING
PERMITS



CENTRALIZED CUSTOMER
SERVICE

Problem

The journey for a business in SF is complicated. Information and technology are disparate. A business must navigate between agencies and map its own journey. Programs such as Prop H and SBRA seek to streamline experiences, but the administration is highly manual for all departments involved.

To drive economic development we need to advance our business technology and create a better customer experience to enable a business to navigate our processes with more ease.

Solution

Phase 1 involves rebuilding Prop H/SBRA on **a complete customer engagement platform, such as Salesforce**. The solution should allow the program to scale up by centralizing information, making data transparent, and automating more work.

Existing Alternatives

The Planning Dept administers streamlined permitting manually. Customers experience seamlessness between agencies, but **staff are the real workflow engine for this solution**.

Success Measures

- Streamline data collection for multiple departments, thereby reducing the number of forms and increasing the quality of data collected
- Be able to establish a realistic timeline for application processing and permit/license issuance
- Reduce customer complaints due to misrouted information, misunderstanding of processes, and inability to self-monitor status and progress of work

Short-Term

FY22

- Scope work with Deloitte consulting

FY23

- Put Prop H/SBRA on a scalable platform with automations and aggregated data

Long-Term

FY23 and beyond

- Centralize information and create a true experience platform
- Determine if agencies want to extend their cases management systems into this solution

Stakeholders

All agencies involved in regulating a business

- Building Inspection
- Planning
- Fire
- Public Works
- Public Health
- Public Utilities
- Office of Small Business

Create a business platform /
Scale Prop H and SBRA for all businesses

Year 1 Costs

\$3m
Scoped using Salesforce
and Deloitte Services

Future Costs

\$5m over 2 years
Based on scope

Problem

Customers tell us constantly that their applications are sitting in a black hole. We aspire to make the construction permitting process move at the speed of the applicant. But right now, the process is slow and opaque.

There are no citywide goals for permitting performance, and no citywide view of permitting performance data. Permitting data is fragmented, sitting in multiple departments and in multiple formats. Without shared policies, definitions, and tools, department-level permitting data is difficult to share and analyze internally.

Meaningful performance improvements will be near impossible without better tools making construction data more accessible.

Solution

Develop a strategy and create a central technology solution to support it. The solution includes **normalizing data** across departments, making **aggregated project data** available to everyone, and creating a data science program to **work with the information once it exists**.

Existing Alternatives

The Planning department led an effort to develop some shared data reporting. However, their works has led us to understand the scale of the issues associated with the construction data, and the need to invest in a solution to improve data quality and transparency.

Success Measures

- Decrease volume of customer inquiries and complaints, which gives time back to staff.
- Create equity in permitting by allowing customers to manage their projects, see status information and rely less upon expeditors.
- In Phase 1, success means we've received 70% of the backlog data from each department.
- In Phase 2, success means this backlog data is publicly viewable and searchable.

Short-Term

- FY22 - FY23
- Deep dive into each departments construction project data
 - Coordinate with Data SF on hiring and platform setup

Long-Term

Discovery work should inform future enhancements which include the creation of BIM management programs, the introduction of machine learning, and the use of digital twins

Stakeholders



Year 1 Costs

\$750,000 - \$850,000
Technology &
Data Resource

Future Costs

\$1m - \$1.2m
over 2 year

Construction Performance Data

Problem

Small steps have been made to move building permits beyond paper. However, most permits remain on paper. The few permits that have moved into the Electronic Plan Review (EPR) process require a significant amount of manual administration.

The EPR solution is incomplete, lacking a robust workflow engine and database to enable automation. As a result, the process is error-prone, inconsistent, and vulnerable to ethical issues internally. For customers, the current process can be opaque and unpredictable.

Solution

Enhance the current EPR process by adding missing solution components, like a robust database and workflow engine. Ultimately, build a **complete end-to-end EPR solution** that includes automated routing for all departments.

Existing Alternatives

A partial digital solution is in place but does not have the ability to automate customer communications, automatically move work or support Mac users in an acceptable way.

Success Measures

- Reduce routing errors, which hamper predictability in work for both staff and customers
- Reduce customer complaints about missed routing steps/stations (e.g., BUF, MOD).
- Reduce department backlogs.
- Increase engagement with non-expert customers.
- Be able to collect revenue more quickly.
- Standardize processes with and between departments which will improve productivity and delivery.
- Reduce the storage of paper plans and use the space for staff.

Short-Term Work

FY22 - FY23 (early)

- Redesign DBI intake process
- Standardize work across EPR solutions
- Build interim platform solution for EPR

Long-Term Work

FY23 and beyond

- Build requirements for automated routing
- Procure complete end-to-end EPR solution
- Design process to integrate all departments involved in construction permitting

Stakeholders

All agencies involved in the building permit process

- Building Inspection
- Planning
- Fire
- Public Works
- Public Health
- Public Utilities

Year 1 Costs

\$500,000 FY23

Future Costs

\$500,000 FY24

Digital Building Permits

Problem

Currently, customer service for permitting is decentralized. The permit ecosystem is complex and confusing, even for those familiar with the process. A single project could have a dozen different customer service pathways depending on the size and scope of their project.

If a customer wants information about a service they must contact multiple departments (or multiple units within a department). If they need a status for a project they must make multiple contacts. This forces a customer to be an expert on our processes in order to know where to send a question.

Solution

The Permit Center proposes centralizing some of this complicated process by **consolidating customer questions to a single entry point in Zendesk**. Permit Center customer service staff will triage tickets and handle simple inquiries. More complex inquiries will be routed to the permitting department for resolution.

Existing Alternatives

The Office of Small Business and Office of Economic and Workforce development handle some issues but are not equipped to handle large volumes of centralized inquiries.

Success Measures

- Faster and easier inquiry process for customers.
- Reduce permitting staff time spent on customer inquiries. Shift specialized permitting department staff (such as Plan Checkers) away from routine customer inquiries toward more complex permitting work.
- Capture structured data on customer inquiries.
- Use structured customer inquiry data in Zendesk to inform staffing and policy decisions.

Short-Term Work

- Identify simple questions that can be moved away from expert permit specialists
- Create a plan to move departments core questions

Long-Term Work

- Aggregate information from regulatory departments into single self-service resources
- Move departments into Permit Center Zendesk
- Review data with 311 to determine if they can manage and support

Stakeholders

- Planning is the first department to move their general customer service work to the Permit Center
- All agencies involved in the regulatory / permit lifecycle

Year 1 Costs

\$60,000 - \$120,000
License and Services

Future Costs

\$0 - \$15,000
Licenses and Services

Centralized Customer Service