

# **Strategic Business Plan for Development Services**

SANTA ROSA, CALIFORNIA

**REVISED STRATEGIC PLAN**

July 26, 2024

**matrix**   
consulting group

## Table of Contents

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1. Strategic Plan Introduction and Executive Summary .....	1
2. Setting the Strategic Plan Framework .....	4
3. Management and Administration Analysis .....	11
4. Technology Assessment.....	25
5. Customer Interaction and Information Sharing.....	33
Appendix A: Recommendation Summary .....	38
Appendix B: Current State Assessment .....	43
Appendix C: Employee Survey .....	56
Appendix D: Stakeholder Survey .....	69
Appendix E: SWOC Analysis .....	101

# 1. Strategic Plan Introduction and Executive Summary

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Matrix Consulting Group was retained by the City of Santa Rosa, California (City) to conduct to develop a strategic plan for the development review services provided by the City. This strategic plan was focused on identifying recommendations to improve internal collaboration, leveraging technology for improved efficiencies, enhancing customer service internally and externally, and providing predictable service. As part of the strategic planning effort, mission and vision statements for the development process were created. This effort was an outcome of the City’s 2022 Strategic Planning Goals which was to improve the City’s development review services and provide a more predictable development process.

The following document outlines the results of various analyses and information-gathering processes that were conducted as part of the strategic plan development.

## 1. Methodologies

The Matrix Consulting Group’s project team utilized a wide variety of data collection and analytical techniques, including the following:

- **Current State Assessment:** The project team developed a current state assessment that captured current staffing levels, roles and responsibilities, and performance metrics for each operational area. This document was utilized as a base point of comparison for future analysis to demonstrate how the changes recommended differed from existing practice.
- **Employee Survey:** The project team surveyed all development review employees on their experiences and thoughts related to the provision of development review, permitting, and inspection services. The survey allowed employees to provide feedback for use in this report in a manner that was safe, secure, and anonymous.
- **Stakeholder Survey and Focus Groups:** The project team surveyed City patrons of the development review, permitting, and inspection services for the previous three years. Focus groups were also held with community leaders and interested stakeholders to garner information on the services provided by the City.
- **Strength, Weakness, Opportunities, and Challenges (SWOC) Assessment:** A SWOC workshop was conducted with all development review staff to discuss their perceptions of the development process strengths, weakness, opportunities, and challenges. Following this workshop, a survey was sent to staff to rank their priorities for each of the themes discussed and developed during the workshop.
- **Mission and Vision Statement Development:** At the conclusion of the SWOC workshop, the project team facilitated mission and vision statement conversations. These conversations focused on identify key terms, initiatives, and priorities for the provision of development services. The terms and focus area identified as part of this exercise were compiled into a survey that staff were asked to prioritize. The survey results were used to help create mission and vision statements.
- **Analysis and Recommendations.** Based on the defined strategic plan objectives, feedback received from the surveys, SWOC analysis, and to align with the mission/vision statements, the team identified strategic recommendations. Recommendations focused on management and administration, technology needs, and customer engagement/information.

Each of these methodologies and interim steps were used to develop the strategic plan recommendations.

## 2. Overview of the City Council Strategic Goals

In February of 2024, the Santa Rosa City Council convened for a goal setting session. The session produced seven goals to guide the city government and community for the future. City Council goals were reviewed with the intent to align as many of the development services recommendations with the adopted goals.

The seven City Council goals are described below.

### **Goal 1: Promote Citywide Economic Development**

Sustain a diverse and thriving economy that benefits Santa Rosa residents and businesses and contributes to the community's economic health while preserving historical and cultural integrity.

### **Goal 2: Achieve and Maintain Fiscal Sustainability**

Sustain fiscal health by maintaining reserves, forecasting impacts of budget choices, monitoring revenue trends, maintaining competitive salaries for employees, and creatively leveraging other funding sources.

### **Goal 3: Create an Environment that Supports Staff and Operational Excellence**

Create a high-performing organization that pursues excellence, efficiency, and engagement is fiscally sound, promotes diversity, equity, and inclusion, and reliably delivers outstanding services to the community.

### **Goal 4: Invest in the Development and Maintenance of the City's Infrastructure**

Invest in and maintain infrastructure that supports environmental sustainability, multi-modal transportation options, and a vibrant City.

### **Goal 5: Plan for and Encourage Housing for All and Reduce Homelessness**

Pursue housing options for residents of all income levels, partner with key stakeholders to offer housing and support services to the unsheltered and address the issues and causes of homelessness.

### **Goal 6: Address Climate Change**

Pursue carbon neutrality and environmental education for all.

### **Goal 7: Foster a Safe, Healthy, and Inclusive Community**

Promote public safety, engage residents with policy issues, and use a broad range of proactive approaches to reduce racism and inequality in our community.

## 3. Strategic Plan Framework

The foundation of the development services strategic plan is based on the following four pillars.

- Unite the development services teams in providing service to the community.
- Provide a predictable development review and permitting process.

- Have a culture focused on providing a high level of customer service.
- Leverage technology to provide efficient service.

These pillars were used to create the following vision and mission statements.

**Development Services Vision Statement**

■ In our vision for Santa Rosa, we aim to facilitate sustainable development through high-quality and efficient service for the benefit of all.

**Development Services Mission Statement**

■ It is the mission of the Development Services team to enhance the quality of life for every resident through a transparent, efficient, and collaborative approach. We aspire to provide innovative service that not only meets the community’s present needs, but also plans the way for a resilient and thriving future. Together, we will build a foundation that establishes a safe and sustainable environment for all in Santa Rosa.

These pillars and statements serve as the basis for the strategic plan recommendations.

The following chapters provide the details of the analysis, findings, and recommendations presented in the Development Services Strategic Plan. Appendix A provides an overview of the recommendations, how the recommendations align with the 2024 Council goals, prioritization, and timeline for implementation.

## 2. Setting the Strategic Plan Framework

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The overarching focus of this strategic plan assessment was to develop better alignment across the development services functions within the City organization. Furthermore, it was desired to create a set of common priorities that help to develop a strong team focus.

There are four goals that frame the strategic plan, mission, and vision statements:

- Develop vision, mission, and values statements that will unite the development services team in providing service to the community.
- Provide a predictable development review and permitting process.
- Have a culture focused on providing a high level of customer service.
- Leverage technology to provide efficient service.

The following section describes the initial framework of this strategic plan effort.

### 1. Strengths, Weaknesses, Opportunities, and Challenges (SWOC)

A specific task of this planning effort included the project team hosting a dynamic workshop and discussion with development staff to conduct a Strengths, Weaknesses, Opportunities, and Challenges (SWOC) exercise. The SWOC meeting was held on the afternoon of September 27, 2023. All development review employees from Planning and Economic Development, Fire, Water, and Transportation and Public Works were invited to participate. A total of 78 staff were invited and 72 participated - a 92% participation rate.

During the SWOC, participants were specifically asked to identify items for each of the four areas (strengths, weaknesses, opportunities, and challenges). Staff members were extremely willing to participate in the assessment and provided several items for each category. It was quickly identified by the project team the need to further prioritize the items mentioned in the SWOC. An employee survey was created to provide additional feedback and prioritize the discussion items. In addition to the SWOC, the project team facilitated discussions focused on mission, vision, and values statement with staff.

### 2. Employee SWOC and Vision/Mission Survey

During the SWOC workshop, City development review staff identified many items for each of the four areas (strengths, weaknesses, opportunities, and challenges). The project team created an online employee survey to better understand staff’s priorities of the mentioned items. The online survey was activated on October 9, 2023, and closed on October 25, 2023. A total of 56 respondents completed the survey and provided feedback. In addition to the SWOC prioritization, two open ended questions focused on mission and value statements and key words were provided.

Based on strengths that were highlighted during the SWOC session, respondents were first asked to rank those previously identified. The top four strengths ranked were all surrounding the topic of staff. This included staff’s knowledge, ability to work well together, and support from leadership. The following table summarizes the top identified strengths:

Strengths	Score
The people I work with are supportive, collaborative, and have positive attitudes.	8.8
Internal staff have a strong knowledge of their area and are open to cross-sharing of information.	7.8
Leadership supports the staff and are open to process improvements.	7.2
Staff go above and beyond to get tasks done on time.	6.0

The second question asked respondents to rank order of eleven weaknesses statements that were identified during the SWOC session. The top four weaknesses ranked were related to the lack of support to the staff, specifically as it has to do with building capacity, through training and technology, and managing political influences. The following table shows the top four identified weaknesses:

Weaknesses	Score
High workload and limited staff capacity.	10.5
General staff training, including an understanding of the Development Review process.	8.0
Technology concerns, including using proper systems and the training of those systems.	6.7
Managing political influences.	6.6

The third question asked respondents to rank order ten opportunities that were identified during the SWOC session. Training and professional development was noted as the top opportunity, closely following by enhanced communication between staff, career growth within the City organization, implementation of collaborative processes and better workload management.

The top opportunities for improvement identified were:

Opportunities	Score
Emphasizing various types of training and professional development.	7.0
Utilizing calendars, centralized emails, and phones for enhanced communication between staff.	6.7
Offering career growth within the organization.	6.5
Implementing collaborative processes that break down silos between offices.	6.3
Evaluating staff assignments to better ensure workload management.	6.3

The fourth question asked respondents to rank eleven identified challenges from the SWOC session. Challenge statements were focused on the overall success of the City’s development review operations and functions. See the image below to see the scores for the top challenges:

Challenges	Score
Aligning workload and staffing levels.	9.9
City Council and City Executive team understanding of the development review process.	7.5
Funding and clear policies regarding training and professional development.	7.4
The prioritization of tasks.	6.7

Again, the themes of staff capacity, workload, training, and professional development emerged and were clearly identified as challenges. These challenges focus on staff feeling they are not being properly resourced to handle the current workload and service demands. The understanding of the development review process by City Council and City Leadership was also prioritized as a challenge, which indicates there is a disconnect between staff and the elected officials and/or upper management on understanding the steps required and the priorities of development review.

The goal of the post-SWOC employee survey was to formulate base mission and vision statements. Following the SWOC prioritization questions, the survey included two open ended questions to help guide respondents in building the fundamental themes of those statements:

- **The mission of the City staff in the development process is (fill in blank).**
- **What key word(s) should be included in a mission/vision statement: (fill in blank).**

The respondents were given ten sample choices (as identified in the staff discussion) for the first question and were asked to rank the choices, with an additional option to provide a choice not listed. The following table shows the rank order results received for the first fill in the blank question:

The mission of the City staff in the development process is _____	Score
to provide quality service.	7.8
to provide efficient service.	7.3
to provide good customer service	7.1
to assist the customer	5.8
the provision of a safe environment.	5.6
to regulate the built environment	5.2
to provide equitable development	4.9
to engage with the community.	4.3
to provide predictable service / performance.	3.6
to be an advocate for the community.	3.5

The respondents were then given 14 choices for the second question and were once again asked to rank the choices, with an additional option to provide a choice not listed. The following table shows the rank order results received for the second fill in the blank question:



Mission/Vision Statement Key Words	Responses
Quality of life	20
Transparent	17
Efficient	16
Collaborative	14
Sustainable	13
Adaptable	13
Inclusive	12
Timely	10
Predictable	9
Accessible	8
Engaging	7
Environmental	6
Enhancing	6
Resilient	5
Other (please specify)	4

Of the four that selected other, the key words were: Safe (x2), Beautiful, Staff Availability, and Enduring.

The theme that emerged for the mission statement focused on **providing the customer high, quality service**. This was followed by a theme of **ensuring a safe and sustainable environment** (both natural and built).

The top five key words that were identified were **quality of life, transparent, efficient, collaborative, and sustainable**. The phrase “quality of life” indicates the importance of the community in the work that is being produced by development services. “Efficient” and “collaborative” indicate a desire to improve productive teamwork, while ensuring it is “transparent” for the customer. “Sustainable” likely touches on the importance of the surrounding environment and its protection in development review.

The entire Strategic Planning SWOC Survey Analysis is included as Appendix D to this report.

### 3. Compatibility with the City Council’s Mission, Vision, and Values

In addition to reviewing the input received through the employee surveys, the project team reviewed Santa Rosa’s current City Council mission, vision, and values and the organizational values of the City Manager. This was done to identify shared values and themes between the development services team, City Council, and City Manager. It was also to ensure the specific statements developed for City development services were in alignment with the greater City organization.

#### City Council Vision Statement<sup>1</sup>

- Santa Rosa - Leading the North Bay.

<sup>1</sup> Santa Rosa City website, <https://www.srcity.org/2476/Mission-Vision-Values-Goals-Priorities>

**City Council Mission Statement<sup>2</sup>**

To provide high-quality public services and cultivate a vibrant, resilient, and livable city.

**City Council Values<sup>3</sup>**

- Excellence
- Innovation
- Teamwork
- Integrity
- Inclusiveness
- Transparency

**City Manager Organizational Values <sup>4</sup>**

- We are committed to a creative process which develops mutual respect and pride in ourselves and the community. To this end, we value:
- Providing Quality Service
  - Encouraging Accessibility, Open Communication and Participation in Decision Making
  - Seeking and Celebrating Diversity
  - Developing an Environment of Mutual Trust, Fairness, Sensitivity and Dignity
  - Promoting Confidence in the Individual Capabilities and Cooperation Throughout the Organization
  - Adapting to the Changing Circumstances of the Community

**4. Development Services Vision and Mission Statements**

A key element to effective and efficient public service is a common vision and sense of mission. This is challenging within the development review world because the regulatory processes involved cross over several complex technical areas (appropriate development design, protection of environment, sustainable infrastructure, ensuring public safety, etc.), as well as separative divisions or departments. The process also can be seen to have multiple external “customers” – current and future residents of the city, developers, builders, etc. – and several internal “customers” – elected officials, city management and leadership, etc.

Vision and mission statements are typically used by City organizations to provide a comprehensive framework for guiding a team toward its goals. They should also represent shared values of a group of people (and sometimes organizations list those values in combination with vision and mission statements).

Vision and mission statements serve distinct purposes in guiding a group of staff members. A vision statement is future-oriented, often broader, and more abstract in

<sup>2</sup> Ibid.  
<sup>3</sup> Ibid.  
<sup>4</sup> City of Santa Rosa Website <https://www.srcity.org/246/City-Manager>

wording, and captures the overarching purpose and direction of a team. The very word “vision” implies the statement should be visionary. It also is intended to inspire and motivate employees by painting a clear picture of the long-term goals. Rather, a mission statement is action-oriented, often more specific and tangible in wording, to identify the current activities and decisions of a team. Creating a powerful mission statement is an important part of helping staff have a better understanding of how their role is part of the greater City organization and the day-to-day work.

Establishing vision and mission statements can be the beginning of improved collaboration across all development services functions in the City. Additionally, it will be vital for department and division leadership to work with their staff and align their specific technical responsibilities to the overarching vision and mission (e.g. confirming approved plans are consistent with the building code to help ensure the built environment is safe and sustainable).

A sample mission statement that was adopted in another community is provided as an example that serves to effectively communicate a united sense of purpose and focus for staff:

Model Development Services Mission

To deliver a process that is predictable, efficient, and understandable to the people who use it;

To be viewed as a single organization in the delivery of development services, not separate departments working independently;

Not to sacrifice the quality of the end product;

Ensure that we continue to protect the quality of the public and private infrastructure, the safety and integrity of the built environment, and the livability of the city.

*Our shortcut is fast, predictable, and one-city.*

*Source: Bellevue, Washington*

The project team conducted further analysis to draft development services vision and mission statements for consideration. One visual way this analysis occurred was creating a word cloud that factored in the key words and statements prioritized by employees and the words included within the established City Council vision, mission, and values statements.

Word clouds are graphical representations of word frequency that give greater prominence to words that appear more frequently in a data collection. With this graphic, the larger and darker words highlight words that were repeated and can indicate more significance. Smaller and darker words indicate words that weren’t necessary repeated as often but are similar in theme.



Additionally, several examples of other cities’ development services and community development vision and mission statements were reviewed by the project team. The statements were considered to identify the styles of statements being utilized across the country.

Following the analysis, vision and mission statements were drafted for the development services functions of the City:

**Development Services Vision Statement**

■ In our vision for Santa Rosa, we aim to facilitate sustainable development through high-quality and efficient service for the benefit of all.

**Development Services Mission Statement**

■ It is the mission of the Development Services team to enhance the quality of life for every resident through a transparent, efficient, and collaborative approach. We aspire to provide innovative service that not only meets the community’s present needs, but also plans the way for a resilient and thriving future. Together, we will build a foundation that establishes a safe and sustainable environment for all in Santa Rosa.

**Recommendation #1:** The vision, mission, and values statements should be updated every three years with development services employee involvement and feedback.

**Recommendation #2:** Have each Department/Division involved in development services identify specific strategies that demonstrate how their services will meet the greater vision and mission.

### 3. Management and Administration Analysis

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The following section reviews management and administrative practices of the City’s development services functions. This includes the topics of customer service, procedures and practices, staff training and professional development. Each of the topics discussed below are part of the strategic planning goal of providing a predictable, efficient, and effective service both internally and externally.

#### 1. Improvement of Work Culture

Improving work culture within an organization can have numerous benefits, including increased productivity, employee satisfaction, and overall organizational effectiveness. From the employee interviews and employee surveys, a general theme about a poor work culture emerged. A couple of consistent themes referenced by staff are surmised in the following quotes.

**Staff Feedback:**

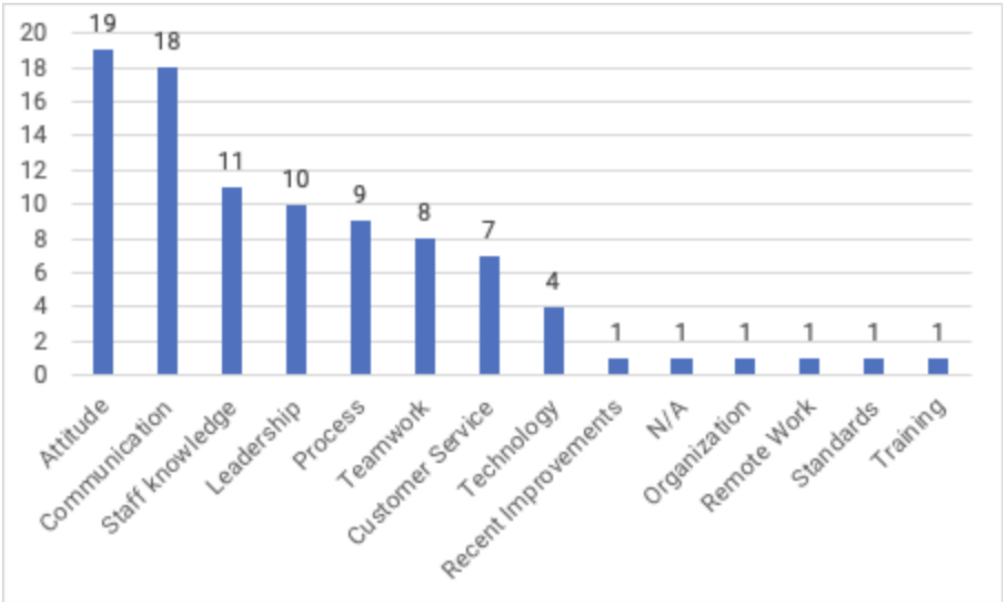
“Culture of the City is to stay in your lane.”

“Need a lot of culture improvement in the organization.”

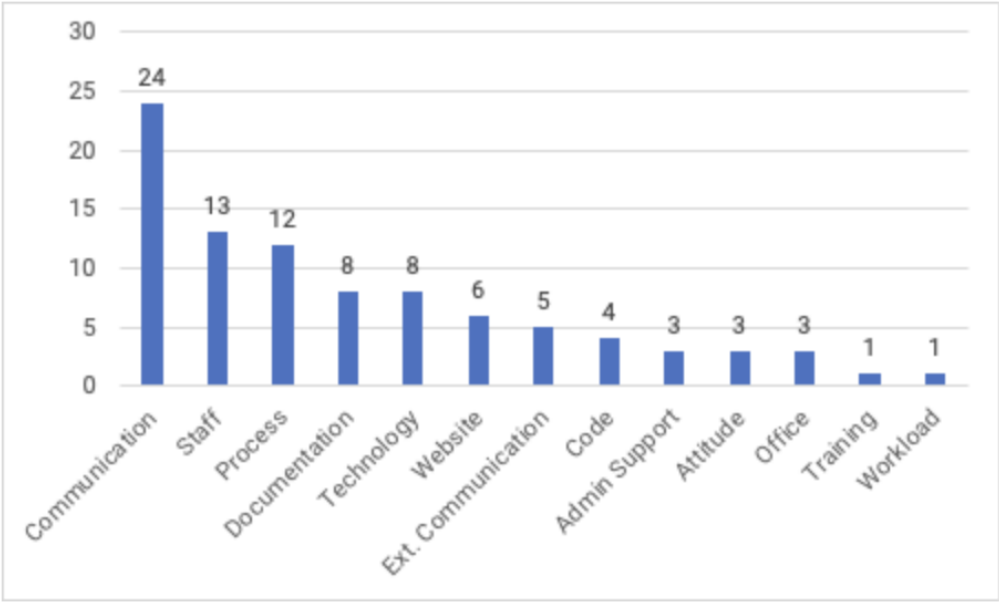
The theme surfaced from more than direct mentions of poor work culture. It became evident due to the following reasons:

- **Lack of transparency** – Several assumptions are being made by employees about other division/department’s functions and roles. This indicates the team has not been provided with clear information about organizational goals, policies, and decision-making processes. By increasing transparency across development services, trust will be built amongst employees and will lead to more collaboration. This typically occurs by management staff meeting with each other frequently to be better informed of each development service function within the City, then to ensure that information is passed down to each of their staff teams. This can also be overcome by the utilization of cross-discipline review teams and meetings to discuss specific applications. True understand of individual’s role in the process can be developed through individual relationships with colleagues on other teams.
- **Ineffective and infrequent communication** – While communication was identified as one of the top strengths in the employee survey, it was also identified as the top opportunity for improvement.

Strengths by Category



Opportunities for Improvement by Category



This indicates that some groups of staff are communicating well together, but that comprehensive communication across all division/department lines may not be occurring. It can also indicate that when communication does occur it is done well, but that it is happening infrequently. It is important to create channels for effective communication, both vertically (between management and staff) and horizontally (among colleagues). Encourage open dialogue, active listening, and feedback mechanisms to ensure that everyone's voice is heard and valued. One way this can occur is by managers and directors establishing “office hours” where any employee is invited to communicate their concerns. It can also be improved by providing opportunities outside of work hours to allow employees to socialize and communicate with one another. Lastly, having all employees complete a personality assessment or “strengths finder” test<sup>5</sup> can help each employee better understand each of their coworkers’ style of communication and how to better communicate respecting their own and others communication styles.

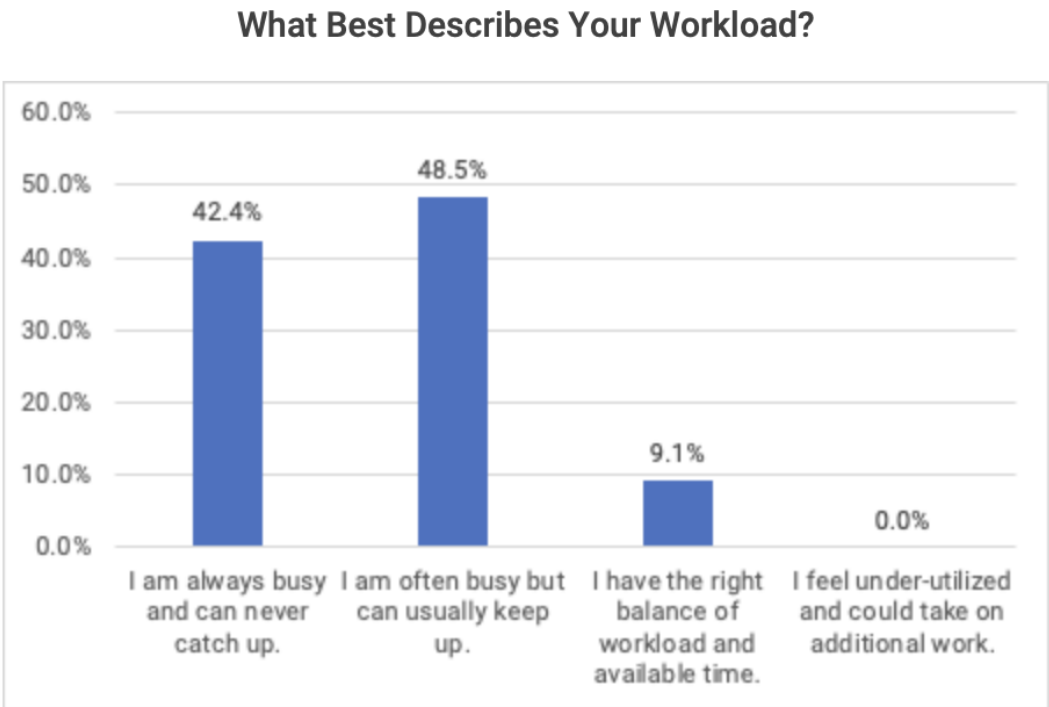
- **Minimal investment in staff training and professional development** – While training did not emerge as either a well agreed upon strength, or an opportunity for

<sup>5</sup> Gallup ClintonStrengths <https://www.gallup.com/cliftonstrengths/en/252137/home.aspx>

improvement, it was identified by some divisions in the employee survey. It also emerged from the staff interviews and the stakeholder focus groups as a need for newer employees. Training will be highlighted further in this section, but a lack of investment or dedication to staff training and professional development can certainly produce poor work culture. It is important to provide opportunities for professional development and skill enhancement to empower employees to grow within their roles. Training programs, workshops, and mentorship initiatives can help employees feel valued and motivated to contribute their best.

- **Little recognition of employee work and achievements** – The project team was not made aware of any activities sponsored by the City that can recognize employee accomplishments. It is beneficial to acknowledge and celebrate the accomplishments of employees through formal recognition programs, awards, or simple gestures of appreciation. Recognizing hard work and dedication helps boost morale and reinforces positive behaviors. Celebrating successes is an important part of developing a positive work culture.
- **Large percentage of non-present (contract) coworkers** – To supplement staffing needs over the past few years, contract (third party) staff have been utilized in the plan review process. This has created a disconnect between staff who are working on behalf of the City but who are not engaged with City staff.
- **Disconnect between larger City goals and City daily functions** – In the staff interviews, it was mentioned about the City's recent focus on housing supply and affordability. This sometimes caused employees to feel that their daily functions do not matter for the overall City goal. This demonstrated disconnect may be linked with the lack of transparency between upper management and non-supervisory staff. Disconnects can be improved by ensuring feedback is continually received from employees, either through surveys, focus groups, or suggestion boxes, so that management can better understand the employees' perspectives and identify areas for improvement.
- **Siloed focus on performance** – While there was overall general agreement of strengths, weaknesses, opportunities and challenges across the development services team, there were examples of departments and divisions being an outlier from the majority opinion. This demonstrates that there is a siloed focus on performance and that the development services team is not operating under a single mission or single voice. The creation of specific development services vision, mission and values statements will help encourage employees to speak and act with more unison.
- **Prioritization of Task** – A key point that was raised in the SWOC workshop was related to competing priorities for staff that arise after an annual workplan is adopted. The feedback focused on staff having to shift focus to address non-urgent items pushed down from City Management and/or City Council that were not previously included in the workplan. While the City Manager's Office and City Council reserve the right to shift priorities for City staff, doing so without recognizing or adjusting staff's current workload causes an undue burden that ultimately contributes to bandwidth issues, systemic inefficiencies, and low morale. These shifting needs impact the overall operational efficiencies and can impact service goals.

- **Work/Life balance** – The employee survey specifically asked employees to state whether they agreed or disagreed with the following statement: “I have a good work/life balance.” While collectively the staff showed 82% in agreement with the statement, the survey later highlights the workload of staff as being unmanageable and this can have a negative impact on the culture of the organization.



When looking at the differences by position type when answering this question, 57% of management/supervisory staff members were at the workload level of “I am always busy and can never catch up,” compared to 37% of non-supervisory staff. This showcases the staff vacancy rate in the organization and that management/supervisory staff are likely performing duties and responsibilities that are outside of their typical roles and backfilling vacancies. It can also indicate a reluctance to delegate some responsibility to less senior staff. An Oppressive workload can quickly exasperate employee work/life balance and can be a primary reason why staff leave work. The workload indicated is a sign that there needs to be further refinement of every staff members’ roles and responsibilities across the development services team.

By implementing some of the strategies mentioned above, the City can create a positive and supportive work culture that empowers employees, promotes engagement, and ultimately contributes to the delivery of high-quality services to the community.

**Recommendation #3:** Schedule and hold regular staff meetings and socials with all development services staff to encourage team building and establish stronger working relationships between all review staff.

**Recommendation #4:** Managers/Supervisors/Directors shall set published times every week to serve as office hours for employees to come ask questions or state concerns. This establishes a framework that respects everyone’s time, while also maintaining an “open door” policy.

**Recommendation #5:** Identify employees that should form a development services leadership committee that will meet monthly to improve communication, to enhance collaboration, discuss and resolve issues, and formalize roles and responsibilities of each department.

**Recommendation #6:** Develop training material that provides staff an overview of the various development review processes, individual and team roles within the processes.



**Materials should be created for onboard training for new hires. Training materials should be readily accessible to staff for consultation.**

**Recommendation #7:** Create a City internal website or newsletter that can better inform employees that work across the City (including all individuals that are providing services under contract).

**Recommendation #8:** City Council and City Manager’s Office should set Citywide strategic objectives and framework and work with appropriate departmental leadership to discuss the impacts of their potential requests on respective operations.

## 2. Employee Career Growth and Succession Planning

Succession planning is an essential aspect of all organizations, especially those that are highly regulatory, include technical positions, and that are highly decentralized across multiple divisions. Development services has many opportunities for succession planning to properly progress their employees and grow their careers organically.

Succession planning is defined as a deliberate effort by an organization to ensure the continuation of functions and operations when key staff members are absent. This can include absences that occur when staff take normal sick or vacation leave but can also include unplanned absences like resignations, injury, or disability leave. Recent turnover and vacancies in the City are likely one of the reasons why stakeholder feedback highlighted concerns with the consistency and timeliness of development project reviews across the City’s departments and divisions.

Succession planning can take many forms and can occur within an organization or team of any size. It should occur for all positions throughout an organization and not solely for managerial or director positions. The ultimate goal of succession planning is to progress employee skillsets to allow them to step in and perform specific duties of other positions when needed. This requires consistent cross-training of staff, from initial hiring and throughout their employment. Succession planning should fall to all team members throughout the organization and is typically embedded in an organization’s onboarding program.

The employee survey indicated that managerial/supervisory staff were less confident about having sufficient knowledge to correctly answer questions received from the public about the development review process.

**Employee Survey Excerpt**

***Statement #12: I have sufficient knowledge to correctly answer questions I receive from the public about the development process.***

82.2% of non-supervisory staff agreed with this statement, compared to 66.7% of managerial/supervisory staff.

With the City’s turnover and vacancy, this could indicate that staff were placed in manager or supervisor roles without having a lot of practice with those added responsibilities beforehand. This is where succession planning can help ensure new managers are successful in their heightened roles.

Steps that may be taken during the succession plan development and implementation include:

- Identifying the positions that are included and those that are not.

- Engaging all stakeholders who will be impacted throughout the process.
- Developing immediate, short- and long-term succession plans.
- Identifying internal staff members who have demonstrated high performance in evaluations, have a positive impact on the organization, and might be a good candidate for a leadership role.
- Tailoring succession plans at the division level but for each individual member identified as part of the plan (either through their role or skill set).
- Encouraging all employees to create an individual professional development plan, regardless of their position. This inspires employees to be more accountable in their current role and future roles in the organization. Managers should ensure that professional development also aligns with cross-training needs and leadership development.
- Identifying resources needed for the creation and implementation of the plan.
- Evaluating employee talent on a regular basis, ideally annually. This can be done by an appointed “talent manager” within the organization.
- Outlining succession plan goals broadly and individually.
- Directing leadership to engage with staff on a regular basis to receive and provide feedback.
- Creating an open environment where employees can engage in conversations with each other and with departmental leadership.

The above points outline steps to facilitate the development and implementation of succession plans for all development services employees. These points should be used as guiding principles as each department and division develops succession plans for staff.

**Recommendation #9: Create a succession plan to develop and retain development services staff.**

**Recommendation #10: Across all teams and divisions, engage in a succession plan development exercise designed to cross-train staff to serve as backups in the event of temporary/permanent vacancies and to develop professional development plans for each staff member.**

### **3. Establishment of Permitting Timelines and Reports and Implementing Performance Measures**

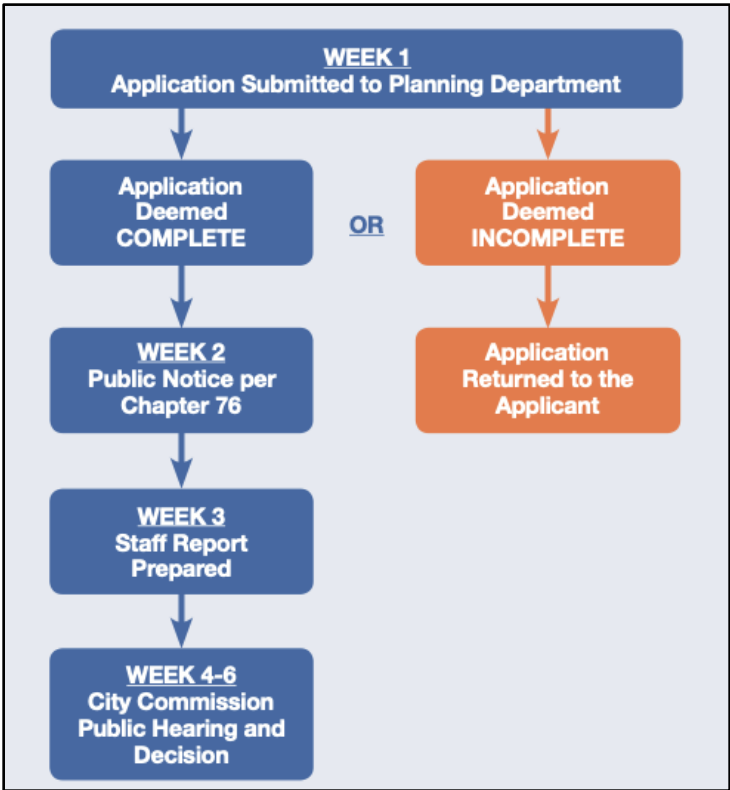
Defined permitting and application timelines provide predictability for applicants that require development review approval. It allows customers to know the steps that must occur prior to receiving entitlement or permits for the proposed development. From the stakeholder feedback and survey analysis, the predictability and communication of review timelines, the review timelines themselves, and the perceived lack of coordination between reviewing City departments and divisions emerged as topics that needed the most improvement.

Application review timelines are typically described in the number of calendar or business days it takes for staff or a City appointed Board to complete a step in the process. It also includes time required for legally required public notice. Many government organizations

have timelines that are administratively approved and recognized. Some choose to have them legally recorded in regulatory documents such as the zoning ordinance.

The development services team priority should be that timelines are provided to the public and that they are met by development services staff once a development review application is deemed complete. Turnaround times may vary greatly by disciplines. For applications that cross review disciplines, each reviewer should aim toward meeting the lead division processing timeline. While the Streamlining Act of 1972 provides guidance on entitlement applications, other application types need adopted performance measure to help establish expectations.

The following image is an *example* how the review timeline can be advertised to the public:



Source: Bozeman, MT

Currently, the regulatory documents used by the City are dated and either provide generalized estimates of when review periods should occur or provide unrealistic timelines that do not reflect current workload. This creates greater importance for the supervisory staff to decide what review timelines are applicable and ensuring each development review team understands those timelines.

The City’s development services team should adopt performance targets and measure and report on performance for all functions, including planning, engineering, fire, and building. Reviewers should be held accountable for meeting assigned timelines.

Once permitting timelines are established, performance goals tied to said timelines should be created by the collective Department leadership team. These goals are typically more specific than the mandated performance timelines and should clarify timelines for corrections and resubmittals. They can also establish expedited goals for prioritized application types.

All performance timelines and metrics should be incorporated into the electronic workflow of the permitting software system to notify staff of their assigned application and related deadlines automatically. This will help keep staff accountable and to develop a better understanding of performance expectations.

Managers should regularly generate reports that indicate whether targets are being met and where they are not. The performance report should also indicate the average number of resubmittals required by permit type. An example of a planning performance report is shown below:

PERFORMANCE REPORT: (TIME FRAME)				
Planning Division Plan Review / Revisions				
Planning Review of Planning Applications				
	Total #	Initial Review	Re-Review	# of Revisions Required
Administrative Design Review	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Design Review	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Tree Permit	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Conditional Use Permit	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Zone Verification	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Planning Review of Building Permit Applications				
Building – Residential	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Building – Commercial	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:
Planning Review of Engineering Applications				
Improvement Plan	Target: Actual:	Target: Actual:	Target: Actual:	Target: Actual:

A similar report should be developed for all types of development applications processed across the development services teams.

Department performance should be reviewed monthly by managers of each division and function and can be reviewed quarterly by upper management and City leadership. Additionally, the reports can be shared with the City advisory boards involved in development review and entitlement when deemed appropriate by leadership. If shortfalls are identified between actual versus target timelines managers should examine the following options:

- Streamlining processes or simplifying reviews
- Adding resources (staff or contracted)
- Changing the performance expectations to be more realistic and achievable.

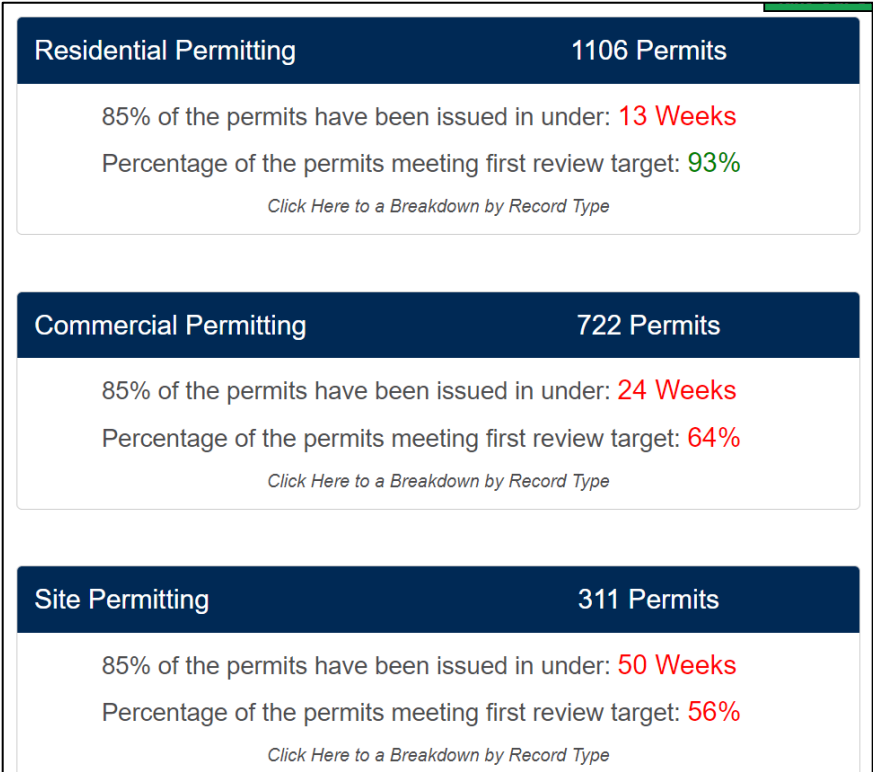
The above reports are to be utilized by managers to examine how timely review is within their divisions. As a result, the information should show performance by division, whether or not the permit originates in that division.

In addition to this, the City can develop public versions of performance reports that identify the average timelines for different commercial application types. This provides greater predictability for applicants by helping them understand the entire time it takes to process a commercial application from submission to issuance.

Below are two examples of online reports in use by other government organizations, showing the type of information disseminated to the public.

Permit or Application	Type	Approximate Business Days*	Currently Processing
Building Permit	Intake	13	2nd Week of August
Building Permit Rapid Review	Intake	9	3rd Week of August
Building Construction Change - (Hybrid Process PTS/Accela)	Intake	5	4th Week of August
Building Construction Change	Intake	4	4th Week of August
Demo, Stand Alone Mechanical, Plumbing and Electrical Permits	Intake	6	3rd Week of August
Discretionary Projects	Intake	1	Current
Grading, Public Improvement, Mapping	Intake	23	4th Week of July
Sign Permit	Intake	6	3rd Week of August

Source: San Diego, California



Source: Tacoma, Washington

The selected style of public reporting should encompass all application types and steps for development services.

The permitting software system should produce both the management reports and the reports for the public. While it may be time-consuming to set up the software on the back end to design such standardized reports, there is much less work involved in reproducing them on a monthly, quarterly, or annual basis once designed. Ideally, these reports should be configured to automatically generate and be sent to managers on a recurring schedule. Additionally, performance reports should be incorporated into online dashboards to enhance transparency with the public. These can be standalone dashboards for the development process or embedded in other online Citywide dashboards.

**Recommendation #11:** Develop clear performance expectations (processing timelines) for City development services by function. Include all departments and divisions involved in the review process. Ensure all processing timelines are based on complete application requirements for the applicant.

**Recommendation #12:** Create standard performance reports to be used by managers and supervisors to track whether standards are being met. Provide simpler standard reports for the public to be posted online.

## 4. Employee Training and Professional Development

Training opportunities are a way for employees to continue their professional development and have the necessary skills and knowledge to perform their job responsibilities and duties. Staff should be encouraged to obtain additional skills, certifications, and knowledge in their technical areas. When staff receive certifications from training, it should be acknowledged by the City through career progression, incentive pay, and other avenues to encourage staff to pursue professional development. This acknowledgement helps attract and retain staff who are knowledgeable in their field and may help reduce turnover in the organization. It shows employees that their professional development and growth is valued by the City.

From the employee survey responses, a greater percentage (70-80%) of the development services staff agreed on the following:

***Statement: I have sufficient training to correctly answer the questions I receive from the public about our development codes and ordinances.***

***Statement: I have sufficient knowledge to answer questions I receive from the public about the development process.***

Agreement was lower (40-60%) among those employees who said they worked in Administration and Economic Development, Public Works/Transportation/Water Utilities and those that selected "Other." This indicates there is a need for increased employee training.

Two levels of staff are prime candidates for professional development training: 1) newly promoted, appointed, or hired managers and supervisors and 2) entry-level/ non-managerial staff (primarily Technician positions for development services functions). Depending upon their profession/role in the City, there are different types of training that may be required, encouraged, or may be beneficial in the specific duties of staff as follows:

### (1) Manager / Supervisor

A critical aspect of management is building a workplace culture of continuous improvement. A solid onboarding program can provide support, but additional training is also important. In many government organizations, staff are promoted into management positions because they are good at entry-to-mid-level work and demonstrate some leadership skills, or because a staff vacancy occurs, and a replacement is needed quickly. In these cases, new managers require additional leadership training to manage their staff while still performing their day-to-day responsibilities effectively. The City is fortunate to be in an area rich with local leadership opportunities, such as the following:

- **Leadership Santa Rosa<sup>6</sup>** is a community education program designed to offer participants a broad perspective of the City as well as provide them with the tools to become leaders in the community. Its purpose is to identify, develop, and equip effective community leaders who will help create and support a spirit of cooperation for the resolution of future community challenges. The program is designed to meet these challenges by providing a series of ten full-day sessions and three half-day leadership training sessions. Participants will gain an in-depth view of business and community issues, development to assume leadership roles, and exposure to community involvement opportunities.
- **The Personnel Perspective<sup>7</sup>** is a private company located in Santa Rosa that offers a growing library of training courses based on the evolving needs of leadership and today's workforce. Their training courses are reflective of each client's real world of work that hone the specific skills and knowledge for development. Instructor-led trainings are offered in-person and virtually. From their website, it appears they offer a "Supervisor Toolkit Series" that appears to be ideal for new managers and supervisors. Sonoma County is listed as a government organization past client.

On a nationwide level, the American Institute of Certified Planners (AICP)<sup>8</sup> certification is considered the professional certification of competency for planners. The AICP Certification confirms academic qualifications, relevant work experience, mastery of essential technical skills, and knowledge of related law and ethics required to serve the City effectively. There are AICP tracks available for a variety of educational backgrounds. This is an option for managers and supervisors within the Planning and Zoning Department.

"The National Certified Public Manager Consortium (NCPMC)<sup>9</sup> establishes standards for the Certified Public Manager (CPM) designation. The CPM is a nationally accredited, comprehensive management development program specifically designed to prepare managers for careers in federal, state, and local government as well as other organizations with a public purpose." The CPM designation is awarded to public sector middle managers who have completed the required 300 hours of study through a CPM program accredited by the National Certified Public Manager Consortium. The curriculum focuses on the following competencies: Personal and Organizational Integrity, Managing Work, Leading People, Developing Self, Systemic Integration, Public Service Focus, and Change Leadership. This is an option for managers and supervisors within the Community Development Department.

These are external training programs and certifications that promote the growth and development of individual staff. Ideally, staff should receive such certifications and training before being promoted to managerial positions.

## (2) Non-Manager/ Technician

The non-manager positions are typically entry-level positions and comprise of new graduates or individuals who have recently changed career paths. Having clear expectations set up front with these staff during on-boarding can ensure employees understand the desired work culture of the City. This is also where the implementation of

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<sup>6</sup> Leadership Santa Rosa: <https://www.santarosametrochamber.com/programs/leadership-santa-rosa/>

<sup>7</sup> The Personnel Perspective: <https://www.personnelperspective.com/training/>

<sup>8</sup> AICP through the American Planning Association: <https://www.planning.org/aicp/>

<sup>9</sup> National Certified Public Manager Consortium: <https://cpmconsortium.org>



succession planning is vital. But additional professional development training can also provide staff support.

Training options that can help this level of staff includes the following:

- The City participates in a Learning Management System that is provided to all employees, from initial onboarding and further into their career. Sonoma County's example is known as *sonoma higher ed*<sup>10</sup> and could potentially be a program that is also offered to City employees upon discussion and agreement with the County organization.
- The International Code Council (ICC)<sup>11</sup> provides a Permit Technician Certification track that provides lessons on how to build an ability to exercise independent judgment in evaluating situations and in making determinations at the issuance counter, as well as understand the basic construction components and development practices associated with a project. The certification track also provides technical assistance in the issuance of construction and development permits to ensure compliance with the provisions of State and local jurisdictions' adopted development regulations and codes. This certification is an option for all technicians within the development services teams.
- Planning staff mentioned during interviews that an experimental mentorship program was being utilized for new planners. The City should expand the mentorship program across all development services teams. New and junior staff are teamed up with more senior staff and meet on a regular basis for a mentorship opportunity. Mentorship programs offer numerous benefits for staff members including skill development, improved performance, networking opportunities, career advancement, and knowledge transfer. Mentorship can be incorporated as part of succession planning efforts.

Beyond training that is customized for staff levels, survey analysis showed an apparent need both from employees themselves and City stakeholders for employees to have a better understanding of each function of the City's development review process. To help staff better understand the City's regulatory environment, processes, and technology, a comprehensive training program should be created for staff to understand the various roles in the City's development process upon hire. Documented procedures within each department and division a part of the development services team shall be created and available for staff to reference and update as necessary.

**Recommendation #13:** The City should budget and plan for all required development review staff certifications and explore new certification opportunities for manager and non-manager staff.

**Recommendation #14:** The City should participate in a Leadership Management System, or contract with service provider, to provide leadership and professional development training to employees with the goal of staff retention and succession planning.

**Recommendation #15:** The City shall create a mentorship program across the development services team and have its participation be linked to performance review.

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<sup>10</sup> sonoma higher ed <https://sonomacounty.ca.gov/administrative-support-and-fiscal-services/human-resources/divisions-and-units/workforce-development/sonoma-higher-ed>

<sup>11</sup> International Code Council: <https://www.iccsafe.org>



**Recommendation #16:** Develop training material that provides staff with an overview of the various development review processes, and individual and team roles within the processes. Materials should be created for onboard training for new hires. Training materials should be readily accessible to staff for consultation.

**Recommendation #17:** Create a formalized customer service training program that includes initial and ongoing trainings to staff. Refresher training should be provided quarterly.

## 5. Hybrid Work Environment

The City of Santa Rosa allows Department leadership to determine their remote work policies. Due to potential variability within each Department's respective policy, it is important to have standardization between development review teams as they interact with each other daily. The Technology Chapter discusses software and technology needs for a hybrid work environment. The following points summarize hybrid work related policies specific to the development process.

- Development related meetings such as pre-application meetings, development review committee meetings, etc. should be set on consistent days to maximize participation and in-person involvement. Monday and Friday should generally be avoided for standard meetings as these days tend to have more staff working remotely.
- For teams that have staff who have significant public facing staff (e.g., Building Permit Techs), a policy should be in place to allow for these staff members to be able to work remotely consistently. The ability to work remote for these positions should expand as the City transitions to digital submittals.
- Establish policies for staff's availability on remote workdays. Availability for meetings, phone calls, and other primary duties should be the same as if staff were in person. Staff should utilize their online calendars to indicate in office and remote days.

By implementing the above practices, it will help create operational efficiencies for all staff. An emphasis should be placed on encouraging in-person meetings where appropriate.

**Recommendation #18:** Establish more defined and consistent hybrid work policies to increase collaboration between development review staff and to improve operational efficiencies.

## 6. Zoning Code and Standards Update

Feedback that was noted by both staff and stakeholder were several examples of the current zoning code not aligning with prevailing development trends occurring in Santa Rosa. Examples focused on both challenges with new greenfield development and redevelopment/infill developments alike. A review of the zoning code was not a part of this project scope, so the project team can not elaborate on updates needed. Irrespective, it is important for Planning staff to comprehensively review the zoning code and identify areas where code changes are needed. A comprehensive review of the Zoning code should occur every three to five years, with text amendments occurring two to four times per year (as needed). Additional changes should occur as state legislative changes are mandated.

It is also important for other staff to review their design standards on the same schedule to ensure that standards align with industry design practices and modifications to equipment and techniques. Updated design standards will improve the efficiency of the review process. Design standard modifications and updates should be completed twice a year. A regularly scheduled update will define a process for staff to be proactive in their updating of the codes and standards and provide the greatest flexibility for staff and the development community.

**Recommendation #19: Conduct a comprehensive review of the zoning code and design standards every three to five years and update the code/design standards at least twice per year and as mandated by state regulatory changes.**

## 7. Engineering's Role

Engineers are vital in the development review, permitting, and inspection processes. Engineers review a variety of elements of development applications and includes numerous disciplines that can span multiple City departments (e.g., utilities, transportations, right-of-way, etc.). Additionally, Construction Inspectors are tasked with conducting inspections for items that engineers typical review prior to permit issuance. The organizational structure to engineering in Santa Rosa has evolved several times over the past two decades. Most recently, engineering reviews are split between Engineering – Development Services in PED, Transportation and Public Works, and Water Utility. This decentralization has occurred over the past few years, as the majority of development review previously occurred in Development Services.

The trifurcated approach to conducting engineering development review has posed some challenges related to the respective role in the review process. An issue that was mentioned during staff interviews, focus group meetings, and stakeholder feedback sessions was a clear understanding of the respective engineering review team's role. Individual reviewers indicated a better understanding of their specific role in the review process but referenced challenges of others review role. With internal confusion about the collective role in the review process, has translated to issues with the public understanding of the respective roles.

The three engineering teams needed to develop a formal policy related to their respective role in the process. This policy should outline the specific roles and responsibilities of all engineering teams involved in the development process. For example it would identify which department/division is responsible for transportation, infrastructure, site development, etc. components of the review process. After the policy is developed, information should be provided on the City's website and shared with all development staff regarding each engineering team's role in the process.

The organizational structure of engineering review should be unique to each City and based on the broader organizational design and responsibilities. However, the split between three departments is less common, except when there are separate utility and transportation/public work options such as with Santa Rosa.

**Recommendation #20: Create a formal policy that outlines the respective roles of each Engineering review discipline.**

**Recommendation #21: Provide information to staff and the public regarding the specific role for each engineering review team.**

## 4. Technology Assessment

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This chapter of the strategic plan will evaluate the use of the technology (hardware and software) in the development review process. As with other strategic objectives and recommendations, the analysis will focus on equipping staff and the public they serve with the necessary technology to provide efficient and predictable service to internal and external customers. While this chapter will primarily focus on the development review teams, some issues will touch on citywide opportunities for improvement.

### 1. Current Technology Systems

The current technology systems deployed across the various teams involved in the development review process varies greatly. This variability is even noted within the multiple technology systems that are deployed within in PED and to the degree in which the systems are used. The current state of technology systems related to development is inconsistent and chaotic.

The primary permitting software platform that is utilized by the City is Accela. Accela is used as the building permitting and inspection database. While other functional teams such as Planning may access and use Accela, Building is the power user of the platform. Building has incorporated the vast majority of their processes within Accela or the online portal that is embedded in the program called ePermitHub. Other functional disciplines use Accela, but primarily related to the building permitting and inspection processes. For example, Planning workflows are not integrated into Accela and therefore limited information on their applications are found in the platform.

In addition to the ePermitHub, development review applications can be submitted through email, SharePoint, or by paper (except building). This approach may create confusion and issues for the applicant and for staff who must monitor multiple systems.

Throughout this strategic planning process, the City has started their due diligence to evaluating the functionality and needs of the permitting software and supporting software system needs. As such, this strategic plan will outline permitting software functionality.

Another software systems that some reviewers have access to is BlueBeam. BlueBeam is a plan review software that allows the reviewer to comment directly on the plan set. BlueBeam can be integrated directly in newer version of permitting software. The functionality of BlueBeam provides enhanced efficiencies for the reviewer and collaboration for all review entities. Additionally, it does have the ability to integrate seamlessly with the Accela platform and comments can easily be attached the permit application record. Here again, those individuals who have access to BlueBeam is limited and not all reviewers have licenses for the software.

During staff interviews and working group sessions, staff mentioned several other one off systems that they were using. This was noted across the various disciplines and was confirmed during a meeting with the “Technology Working Group” for development review. This technology group confirmed that there are multiple systems and platforms for staff to use and that there was no clear direction on technology related issues. Historically, each City Department and even divisions within PED were autonomous when it came to the procurement and implementation of technology system. There is single

authority related to technology for the development process or more importantly within PED.

## 2. Create a Development Review Technology Master Plan

A key objective to help consolidate the technology platforms used in the development review process is to create a guiding document. The development review process and particularly PED (since they are the primary development related department) should work with the City's IT Department to develop and implement a technology master plan. A technology master plan will serve as the framework for technology systems and platforms to serve those involved in the development review process. The following points outline the approach to creating a technology master plan.

- Development review staff should work with IT staff in the creation of the technology master plan to ensure that it aligns with the City's overall technology strategy and integrates with existing and future systems in place. The IT Director (or designee) should have the final authority over the master plan in consultation with the PED Director.
- PED should take the lead on developing the technology master plan as they are responsible for the facilitation of the majority of development review, permitting, and inspection processes in the City.
- The IT working group participants for the development review process should be included in the development of the master plan, as this group includes broad representation of development related staff.
- The technology master plan should focus on consolidation of software and hardware platforms and reduce the number of individual or specialized software packages. The expectation is that all development review staff should be using a centralized platform for the development review process from entitlement application through certificate of occupancy.
- The master plan should be focused on leveraging the City's permitting software platform as the central software platform for the development review process. Current permitting software platforms have the functionality to cover the vast majority of the City's entitlement, permitting, and inspection processes.

The creation of a technology master plan dedicated to the development review process will help centralize decision making and authority level to the IT and PED Directors. The creation of the master plan will require collaboration between each functional area and hopefully eliminate the autonomy each group has today. Autonomy has resulted in a less efficient process, the acquisition and use of multiple software/hardware platforms, and additional costs. The current approach is not sustainable and should be abandoned immediately. The PED Director (or designee) needs to provide oversight and direction on all technology systems that are dedicated to the development review authority and consult with IT staff when considering purchasing new systems.

**Recommendation #22: Create and implement a technology master plan related to the development review, permitting, and inspection operations of the City.**

**Recommendation #23: The PED Director (or designee) should provide oversight on the development review technology systems in consultation with IT staff.**

### 3. Permitting Software Best Practices

High-performing permitting organizations deploy technology in a way that provides quick and easy access to information for reviewers, inspectors, and staff across all divisions and departments involved in the permitting process. They also allow permit applicants to interact with the process smoothly, and easily access needed information electronically.

The below table outlines how a permit process works with full software deployment.

**Best Practices in Permitting Technology Utilization**

Process Step	Best Practices
Intake	The applicant submits a full application electronically, including all attachments. Documents that require an engineer or architect stamp or seal are affixed with an electronic stamp or seal. The full record including site plan and supporting documents are either attached or linked to the permit record in the tracking system. Upon acceptance of the application, the applicant can pay initial fees electronically through the permitting hub.
Distribution and Review	<p>Plans are electronically routed to plans reviewers who mark-up documents digitally (e.g., BlueBeam or ProjectDox). Reviewers of different disciplines can see each-others’ comments and mark-ups. Any written comments / reports are electronically attached to the application record.</p> <p>Review comments are directly placed on the application plan set and the reviewer who made the comment is easily identified.</p> <p>Reviewers can electronically access any permit history on the project, including past permits issued, conditions associated with prior approvals, and special conditions associated with the property.</p>
Comments to Applicant	The applicant is notified via email when comments are available and can follow an electronic link to see comments and (where relevant) marked up plans. Alternatively, the software may email the applicant the comment letter and marked up plan set. As part of the comment feedback, the applicant can identify who made the comment, their role, and contact information.
Applicant Resubmittal	The applicant uploads a re-submittal once all comments have been addressed.
Re-Review	Reviewers can digitally compare the re-submittal with the original submittal. This may include the incorporation of “clouding” or another feature that easily identifies changes from the original submittal. All records related to the project and property history can be accessed electronically, avoiding the need to locate / retrieve paper files.
Public Hearings	A copy of the full application packet can be posted online as part of the agenda for the meeting where this item is being discussed. Because documents are provided electronically, there is no need to scan paper. The software platform can prepare the meeting agenda and compile all relevant application information.
Permit Issuance	<p>The applicant receives a permit or approval letter electronically along with an electronic version of the approved plans and/or any conditions of approval.</p> <p>Approved plans / approval letter is uploaded to the permit tracking system as record of the final issued permit. All conditions of approval are included in the online record to be checked prior to project completion / sign off.</p>
Inspections	The applicant can schedule requests electronically and be notified electronically of the scheduled inspection time. Inspectors can retrieve the approved plans electronically and enter inspection results into the record. Results are automatically emailed to the customer.

Process Step	Best Practices
Final approval / COO	For final project approval and for projects requiring a certificate of occupancy (COO), reviewers can sign off to confirm that all conditions of approval have been met.
Reporting	The system automatically generates management reports and reports for the public that provide meaningful, clear information regarding timelines, workloads, and can be used to compare performance over time.

As the City considers upgrading their permitting software system, the following elements should be included as part of the platform:

- Submittal of all development application types (e.g., building, planning, zoning, environmental, engineering, etc.) through an online portal.
- An online applicant portal including access to review comments, status updates, and ability to request inspections. The online portal should also allow the applicant to see the status of individual reviews and their application.
- A feature that allows the general public to search application and development activity status (e.g., status of an application, view approved site plans for new commercial development, etc.).
- Integration of the City’s development process and workflow so that progress can be tracked by staff from application submittal to certificate of occupancy.
- The ability to calculate application and permitting fees and accept payment through the software or online portal. This may be accomplished through integration with the City’s finance software or through the permitting system itself.
- The ability to calculate applicable development impact fees in the software system and accept payment from the applicant. An estimated fee feature should be included when an applicant is submitting an application, although fees may not be collected until later in the process.
- The ability for staff to receive notifications regarding new tasks, deadlines, and status updates by application. Ideally, these preferences should be customizable for each staff member.
- The ability to upload review comments (both on the plan sheet and in the permit record) and monitor the status of individual reviewers (e.g., pending Planning comments, Building Inspection has approved, Engineering submitted comments, etc.). All users should have the ability to see other reviewers’ comments and markups.
- A feature that allows the City development review staff to notify the applicant of delays in the review with an updated completion time.
- Templates that allow staff to prepopulate standardized information for review comment checklists, staff reports, permits, etc. Templates should have the ability to link to ordinances, codes, and design standards, automate public notices, etc.
- Has a searchable database by address or other approved identifier such as parcel number.
- Contains approved and constructed/as-built plan sets that are linked to the permit file.



- Incorporates the securities/bond workflow into the permit record and provides automatic notification of renewals/expiration of securities.
- Permit close materials are linked to the permit / parcel identifier. This should include as-builts, proffers, conditions, etc.
- The mobile version of the software program should allow field staff to remotely access the system to consult approved plan sets, inspection results, and determine open permits and violations. Access should be provided to those in zoning and code enforcement.
- The ability to upload photos via mobile version and link to the permit file.
- A web-based access portal for staff to access the system remotely.
- Allows for the integration of the City's GIS system and links to the permit file by identifier.
- The ability for inspectors to be able to route themselves for their daily inspections automatically.
- Allows for an automatic notification (text or email) to be sent from the system for the next inspection appointment. Note: this will only likely work if the routing feature is available and implemented in the software system.
- Allows for managers to run performance/workload reports from the system. Ideally, the system could link to a performance dashboard on the County's website.
- Has a zoning/code enforcement module that tracks open code violations and is integrated into the permitting portal.

Incorporating these elements into the permitting software system will provide the applicant with an easy-to-use online application portal. The online application portal should be comprehensive and serve as a one stop shop for applicants. Similarly, the permitting software system will serve as a centralized program for all development activity and functions for the City. Incorporating these elements into the software system will result in enhanced operational efficiency and increased collaboration and accountability for all development review staff.

**Recommendation #24: Ensure that all best practice elements are incorporated into the updated versions of the permitting and digital review software systems.**

## 4. Additional Technology Needs

A significant portion of the SWOC workshop focused on the software and hardware needs of staff. Many of the software needs focused on a robust permitting software system, there were several other internal resources that staff referenced that were lacking or could be improved. The following points outline some of the key issues.

- Limited ability to see colleagues' calendars for availability and when they are working hybrid. Desire to integrate the INET and staff calendar functions.
- Public computer terminal in lobby so that customers can submit their applications there and receive assistance from staff.
- Ability to forward phone calls from individual's office phone to their computer. This is important for a hybrid work environment.

- Digitization of historic files for easy access by staff.
- Expanded network permissions so that all development staff can access the same network and current/historic permitting application. This is critical until a new permitting software system is implemented and it serves as a comprehensive development and permitting database.
- A single portal for public records / subpoena fulfillment requests.
- Centralized development review email (e.g., development@srcity.org) in addition to the building, planning, engineering, and economic development generic emails for their respective function.

Each of these points impact staff's ability to do their job effectively and efficiently. Many of these items will require assistance from the City's IT Department to address and implement. PED should take the lead on facilitating the conversation with IT and these items should be a high priority for implementation.

**Recommendation #25: Work with IT staff to address technology issues related to calendar accessibility/integration, placing a public computer in the PED lobby, forwarding staff's phone lines through their computer, development review staff access to PED/development internal drives, and a centralized portal for public record requests.**

## 5. Hardware Needs

A concern that was noted by staff during various conversations were the lack of necessary hardware to transition to full digital plan review, the limitations of the permitting software system, and the hybrid work environment. To supplement the future improvements in software systems, staff should be provided with the accompanying hardware. To encourage efficient and effective work practices, the following hardware needs should be provided to all development review staff:

- For hybrid staff, laptop computers that have video capabilities. When in office, they should have a docking station for laptops.
- Staff should be provided with dual monitors in office. This would include larger monitors for those who are primarily conducting digital plan review. Monitor size should be determined based on individual need and workstation ability to accommodate the appropriate monitor size.
- Each staff member should have video conferencing capability at their workstation. The City should provide individual headphones/microphones for staff.
- Field staff should be provided with cellular equipped tablets that can access the permitting system and other resources.

In addition to the technology needs discussed in the points above, staff should be provided with adjustable workstations in the office. This will provide flexibility for each employee to stand or sit and adjust their work area based on their desired ergonomics.

By equipping staff with the appropriate technology hardware, they will be more productive and provide a higher level of service internally and externally.

**Recommendation #26: Staff should be equipped with the appropriate hardware systems. This should include laptop computers, docking stations, dual monitors (larger**



**monitors for plan reviewers), headphones, tablets (field staff) and adjustable workstations.**

## 6. Historic Record Digitization

As the City is in various stages of the digital application process and with the goal of transitioning 100% digital, it is important to develop a strategy for digitizing historic records. Digital historic records may reduce the number of open records request and allow staff to be more efficient when they are searching for past development materials. By digitizing historic development records, it will create operational efficiencies for all staff. However, it will require a significant lift to digitize and catalog historic records.

The City should hire a temporary position to scan, catalog, and digitally link historic development records. This information should be stored in a document management system on the City's internal servers or ideally through a cloud-based system if the City has transitioned to this service. Once historic development records have been digitized, they should be linked to the permitting system by parcel or address identifier. Providing easier access directly to appropriate records.

**Recommendation #27: Hire a temporary position to digitize and catalog historic development records.**

## 7. Software Training

As the City looks at implementing an updated (or new) permitting software system and other technology platforms, it is important that staff are properly trained on the systems. Technology training should be both part of new hire on-board and in-service training for new features, and certainly as part of new software implementation.

To ensure that all staff members can use the permitting software program efficiently and effectively, it is important that the Department create an internal training program. The following elements should be incorporated into the software training program:

- Include technology training in the Department's comprehensive onboarding program for all new staff that provides an overview of all utilized software systems. Tailored training programs should be provided based on each employee's specific role (e.g., intake and permit issuance for building techs, reviewing and posting comments for plan reviewers). This training program should be provided for all staff prior to the launch of new software systems.
- Ensure that staff receive ongoing, periodic training for the software as new updates and features are implemented.
- Provide training for managers on utilizing the software system's performance metric features (e.g., running reports and analytical summaries).
- Create an electronic user guide/desk manual (electronic) that staff can reference for common questions. This manual should be updated as new features are released.

As part of the training program there should be an internal staff member who serves as the subject matter expert for that team (e.g., building, planning, fire, etc.) This approach generally exists with the Technology Working Group and this internal group should serve as the primary individuals who create and provide the software training programs.

Additionally, this team should serve as the first line of questions from staff when they have development review software related questions.

**Recommendation #28:** Include technology training within all development review staff onboarding.

**Recommendation #29:** Develop a formal in-service training program to provide regularly scheduled and as-needed training program for all staff.

## 5. Customer Interaction and Information Sharing

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Prioritizing customer service in local government promotes transparency, accountability, and collaboration, ultimately contributing to the sustainable growth and well-being of the community it is serving. This section of the plan focuses on the customer interaction with the development review processes and the quality of information share to its development review customers.

### 1. City Website Evaluation

Prior to submitting an application or making an inquiry to the City, a customer is highly likely to access the City's website to conduct their own research. Therefore, it is important for the City to have a robust website presence that provides sufficient information to the public regarding the development review process and requirements.

Currently, the City's development services functions are spread across different department and division webpages which is found from a large dropdown menu from the City's homepage. Once a user gets to an individual webpage, there is a side menu that must be utilized to get to various information streams.

Upon review, the key findings identified were:

- The City's website does not appear mobile friendly and is hard to view when using a mobile device.
- The primary dropdown menu from the homepage blocks information on webpages when a cursor hovers over the top menu (due to the dropdown long length); it appeared a newer version of webpage design existed, and an independent menu appeared at the top (eliminating the problem of a long dropdown covering options). The Parks and Recreation Department webpage is an example of this newer style.
- A pop up window asking a user to sign up for a Santa Rosa newsletter sometimes blocked information that was being shown on the webpage.
- A centralized development webpage was not found on the city's website. Users must go to respective departmental webpages to find development information.
- There is limited connectivity between departmental development webpages. This requires the applicant to go to respective departmental webpages versus clicking on links to connect the user to the different development discipline webpages.
- There is no overview of the city's entire development process and the roles of the different review disciplines.
- Each of the respective webpages are text heavy and required significant scrolling on the screen to read all included information.
- Application procedures are described through text on the webpages, when they could better be presented as links to digital forms (e.g., PDFs).
- The side menu on the Planning and Economic Development homepage does not lead users to the correct information. For example, some reports are listed under "Data, Dashboards and Maps" while others are listed under "Plans, Studies, EIRs and Reports."

- Quick information boxes with images are used sporadically across the webpages. Organizing information by images rather than text is typically more user friendly (just ensure the images work on a mobile platform).
- The Planning Application Portal contains extensive information that is organized in lengthy text, not providing a user an easy way to find information.
- The webpages did not include information regarding current or past workload or performance measures.
- Information regarding master plans, long range planning documents, maps, etc. are easily accessible on the Planning and Economic Development homepage.
- While online permitting received a significant amount of praise, several respondents also indicated that web portal can be onerous and difficult to understand. Further refinement of the online permitting portal will continue to alleviate some of these concerns.
- The Fire Department webpage has very limited information regarding their role in the development process.

Overall, there are many challenges with the online presence for the development review, permitting, and inspection information. At a minimum, a centralized development services webpage should be created. This digital one stop shop should provide an overview of the entire development process, individual department/division role in the development process, and links to the individual departments/divisions involved in the process. Individual development webpages are appropriate but should include consistent information, especially for the primary divisions within the process (those in PED). The Fire Department and Transportation/Public Works webpage should have dedicated development related webpages that accessible from the centralized development webpages and links on their respective department webpages.

In addition to the recommendations above, a staff member from each development functional team should be responsible for updating their respective team's development webpage. Website updates should occur as needed.

**Recommendation #30: Create a centralized development webpage that is on the City's homepage that provides an overview of the entire development process.**

**Recommendation #31: Information on each development department/division webpage should be consistent in their format and level of information provided.**

**Recommendation #32: Assign a staff member who is responsible for the maintenance and updating department/division webpages.**

## 2. Development Project Information

On PED's webpages, there is a webpage titled "Developments, Events, and Initiatives" that includes a list of proposed and/or approved developments and other initiatives by the Department. This is a great list of current activities in the development process. One opportunity to modify the "Developments" list is to create an interactive map that shows all development applications under review, permitted, and recently closed out. Aurora, Colorado has an example of a current development map that is accessible here: [Aurora, CO Example](#). This map should link to the type of information that is currently provided on the development webpage.

**Recommendation #33: Develop an interactive development map that is accessible on the primary development webpage.**

### 3. Development Handbook

The Santa Rosa website has a broad range of information regarding codes, standards, requirements, and processes. This information is disjointed, and it is difficult for an applicant to get the “big picture” of how a project would move through the Santa Rosa system, from idea through entitlement (planning approval) to construction and issuance of the Certificate of Occupancy. While some applicants may only need to understand a portion of the process (for example, obtaining an Encroachment permit or a Building permit), for many a broader picture of how the different permit processes interact, and overlap is important to understanding how to interact with the City.

To provide a comprehensive overview of the process, Santa Rosa should create a Development Handbook that provides a more comprehensive view of the process. Preparation of such a handbook is often helpful in clarifying processes, not just for applicants but for staff as well.

Below are some strong examples of development handbooks that could be used as a starting point:

[Aurora, Colorado](#)

[Boise, Idaho \(Planning only\)](#)

[Longmont, Colorado](#)

Each of the above handbooks provides a strong model to be followed in Santa Rosa for creating a similar guide for developers, homeowners, and contractors.

**Recommendation #34: Prepare a comprehensive development handbook that provides clear, user-friendly information on each stage of the development process. Given staffing and workload considerations, it is recommended that this be resourced outside of the department, either through a contract or by hiring a communications expert on a contracted basis.**

### 4. Enhance Information Accessibility in Multiple Languages

There are a variety of languages spoken in the Santa Rosa area. Historically the information provided on the City’s website has been primarily in English. In person service at the City is provided in English and there are translation services available for Spanish. Incentive pay is provided for Spanish speaking staff.

With advances in webpage development and plug-ins, the City should ensure that their website is compatible with translation services. Online translation services are important to reach a broader range of the community and help provide important information to the public. Additionally, it is important to ensure that information the website, particularly PDFs are created in a way that the online translation service used will translate all online documentation. Example would be the development handbook recommended in the previous section and online checklist for a building application. While the actual submittal will be in English, the supporting document for public viewing should be translated for the applicant to better understand the requirements and process.

**Recommendation #35: Ensure the development webpages and supporting documentation is compatible with online translation software.**

## 5. Role of Developer's Roundtable

Recently, the City established the Developer's Roundtable as a way to proactively engage the development community. This group has also served as a way for the City to receive feedback on the overall development process and provide feedback on the recently completed development fee schedule update and this strategic plan development. The Developer's Roundtable can serve a pivotal role in improving the delivery of development services by the City.

Several modifications are needed to leverage the Developer's Roundtable experience and influence:

- The Developer's Roundtable should meet on a regular basis. Ideally, these meetings would occur quarterly.
- The meetings should primarily focus on the following topics:
  - Opportunity for the City to share upcoming changes to the development process or codes/standards and to receive initial feedback.
  - For the City to discuss recent trends they have experienced (e.g., consistent issues with plan review or inspections).
  - Allows development professionals to express concerns over issues/challenges they have faced with the City.
  - Identification of training opportunities needed for the development community.
- The development portion should consist of 12 to 15 individuals who cover a variety of development related professions. Membership should rotate every three years with four to five individuals rotating each year.
- A consistent group of individuals should attend from the City and representatives from building, engineering, and planning should attend. Leadership from each discipline should participate along with other individuals heavily involved in the development process. However, City participation should be limited to six to eight individuals, unless a special topic is being covered.

The Developer's Roundtable is a great initiative and should be continued with regularly scheduled meetings and agendas provided in advance.

**Recommendation #36: Modify the approach to the Developer's Roundtable and hold quarterly meetings with specific topics discussed at each meeting.**

## 6. Proactive Community Engagement

From staff interviews, it was felt by some that the development services team of the City needed to improve their external communications (outside of the City's website). This included leading a public education campaign, providing customer handouts and forms in languages other than English, and increasing the availability of staff to answer process-related questions.

The City has a department dedicated to community engagement efforts (the Community Engagement Department<sup>12</sup>). The focus of the City's community engagement efforts appears to be on equity, inclusion, diversity, and empowerment. It does not appear to

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<sup>12</sup> Santa Rosa Department of Community Engagement: <https://www.srcity.org/250/Community-Engagement>

provide any information for the general public on the City's development review process. Sharing information with the public can help build relationships that ensure future success with application and permit processing. It can also help to promote proactive community involvement for both current and long range planning efforts. The City's departments that are involved with development services can capitalize on the efforts of the Community Engagement Department and begin to spread practical information about its functions and activities.

The following examples represent successful forms of community engagement:

- Ensuring there are staff within the development services' departments who are tasked with ensuring general community engagement efforts are occurring in parallel to the City's efforts.
- Creating a "code corner" within a City-wide publication or newsletter that features a building, engineering, or zoning topic identified by staff as a frequent issue or problem that crosses their desks. These types of publications are often included in utility inserts.
- Publishing relevant development services FAQs into an attractively designed document that is available on the City website.
- Recording public comments received during public hearings and assigning a staff person to follow up with the commentor on their issue.
- Creating a series of informational videos that discuss technical topics of interest for the community, such as the bonding and security process and stormwater management practices.

There are plenty of opportunities for develop proactive engagement with the Santa Rosa community related to the development process. This is especially critical in a community like Santa Rosa who has experienced significant growth and (re)development over the past few years. Efforts should continue to be expanded and ensure a cross-representation of the community.

**Recommendation #37: Build a collaboration with the Community Engagement Department for community engagement efforts that can better inform the general public on the activities and functions of the Planning and Economic Development Department.**



## Appendix A: Recommendation Summary

The following tables summarizes the strategic recommendations. The project team has identified the City Council strategic goal(s) that best aligns with each recommendation. The Council strategic goals are outlined in the Executive Summary on page 2. Also, each recommendation has been prioritized and an assigned timeline recommendation implementation has been identified.

#	Strategic Recommendation	Council Goals	Priority Level	Timeline
Strategic Plan Framework				
1	The vision, mission, and values statements should be updated every three years with development services employee involvement and feedback.	#3, 7	Med	Every 3 years, update in 2027
2	Have each Department/Division involved in development services identify specific strategies that demonstrate how their services will meet the greater vision and mission.	#3, 7	High	Q3 2024
Management and Administration				
3	Schedule and hold regular staff meetings and socials with all development services staff to encourage team building and establish stronger working relationships between all review staff.	#3	High	Ongoing
4	Managers/Supervisors/Directors shall set published times every week to serve as office hours for employees to come ask questions or state concerns. This establishes a framework that respects everyone’s time, while also maintaining an “open door” policy.	#3	High	Q3 2024
5	Identify employees that should form a development services leadership committee that will meet monthly to improve communication, to enhance collaboration, discuss and resolve issues, and formalize roles and responsibilities of each department.	#3	High	Q3 2024
6	Develop training material that provides staff an overview of the various development review processes, individual and team roles within the processes. Materials should be created for onboard training for new hires. Training materials should be readily accessible to staff for consultation.	#1, 3	High	Q1 2025



#	Strategic Recommendation	Council Goals	Priority Level	Timeline
7	Create a City internal website or newsletter that can better inform employees that work across the City (including all individuals that are providing services under contract).	#1, 3	Medium	Q3 2025
8	City Council and City Manager's Office should set Citywide strategic objectives and framework and work with appropriate departmental leadership to discuss the impacts of their potential requests on respective operations.	#1, 2, 3, 7	High	Q2 2025
9	Create a robust succession plan to develop and retain development services staff.	#1, 3	Med	Q4 2025
10	Across all teams and divisions, engage in a succession plan development exercise designed to cross-train staff to serve as backups in the event of temporary/permanent vacancies and to develop professional development plans for each staff member.	#1, 3	Med	Q1 2026
11	Develop clear performance expectations (processing timelines) for City development services by function. Include all departments and divisions involved in the review process. Ensure all processing timelines are based on complete application requirements for the applicant.	#1, 2, 3, 5, 7	High	Q1 2025
12	Create standard performance reports to be used by managers and supervisors to track whether standards are being met. Provide simple standard reports for the public to be posted online.	#1, 3	High	Q1 2025
13	The City shall budget and plan for all required development review staff certifications and explore new certification opportunities for manager and non-manager staff.	#3	High	FY 25/26
14	The City should participate in a Leadership Management System, or contract with service provider, to provide leadership and professional development training to employees with the goal of staff retention and succession planning.	#1, 2, 3, 4, 5	Med	FY 25/26
15	The City shall create a mentorship program across the development services team and have its participation be linked to performance review.	#1, 3	Med	Q2 2026

#	Strategic Recommendation	Council Goals	Priority Level	Timeline
16	Develop training material that provides staff with an overview of the various development review processes, and individual and team roles within the processes. Materials should be created for onboard training for new hires. Training materials should be readily accessible to staff for consultation.	#1, 2, 3, 4, 5, 7	High	Q4 2025
17	Create a formalized customer service training program that includes initial and ongoing trainings to staff. Refresher training should be provided quarterly.	#1, 2, 3, 4, 5, 7	High	Q3 2025, Ongoing
18	Establish more robust hybrid work policies to increase collaboration between development review staff and to improve operational efficiencies.	#1, 2, 3	High	Q4 2024
19	Conduct a comprehensive review of the zoning code and design standards every three to five years and update the code/design standards at least twice per year and as mandated by state regulatory changes.	All	Med	Q2 2026, Ongoing
20	Create a formal policy that outlines the respective roles of each Engineering review discipline.	#1, 3, 4	High	Q1 2025
21	Provide information to staff and the public regarding the specific role for each engineering review team.	#1, 3, 4	High	Q4 2023
Technology				
22	Create and implement a technology master plan related to the development review, permitting, and inspection operations of the City.	#1 - 6	High	Q1 2026
23	The PED Director (or designee) should provide oversight on the development review technology systems in consultation with IT staff.	#2	Med	Q4 2024
24	Ensure that all best practice elements are incorporated into the updated versions of the permitting and digital review software systems.	All	High	Q3 2026

#	Strategic Recommendation	Council Goals	Priority Level	Timeline
25	Work with IT staff to address technology issues related to calendar accessibility/integration, placing a public computer in the PED lobby, forwarding staff's phone lines through their computer, development review staff access to PED/development internal drives, and a centralized portal for public record requests	#1, 2, 3, 6	High	Q4 2024
26	Staff should be equipped with the appropriate hardware systems. This should include laptop computers, docking stations, dual monitors (larger monitors for plan reviewers), headphones, tablets (field staff) and adjustable workstations.	#1, 2, 3, 6	High	Q2 2025
27	Hire a temporary position to digitize and catalog historic development records.	#1, 2, 3, 4, 6	Med	Q4 2026
28	Include technology training within all development review staff onboarding.	#1, 2, 3, 6	High	Ongoing
29	Develop a formal in-service training program to provide regularly scheduled and as-needed training program for all staff.	#1, 2, 3, 4, 6	High	Ongoing
Customer Interaction and Information Sharing				
30	Create a centralized development webpage that is on the City's homepage that provides an overview of the entire development process.	#1, 2, 3, 5, 6, 7	Med	Q1 2026
31	Information on each development department/division webpage should be consistent in their format and level of information provided.	#1, 2, 3, 5, 6, 7	Med	Q1 2026
32	Assign a staff member who is responsible for the maintenance and updating department/division webpages.	#1, 2, 3, 5, 6, 7	Med	Q3 2024
33	Develop an interactive development map that is accessible on the primary development webpage.	#1, 2, 3, 5, 6, 7	Low	Q4 2026
34	Prepare a comprehensive development handbook that provides clear, user-friendly information on each stage of the development process. Given staffing and workload considerations, it is recommended that this be resourced outside of the department, either through a contract or by hiring a communications expert on a contracted basis.	#1, 2, 3, 5, 7	Med	Q2 2026,

#	Strategic Recommendation	Council Goals	Priority Level	Timeline
35	Ensure the development webpages and supporting documentation is compatible with online translation software.	#1, 2, 3, 5, 7	Low	Q3 2026
36	Modify the approach to the Developer’s Roundtable and hold quarterly meetings with specific topics discussed at each meeting.	#1, 2, 3, 7	Med	Q1 2025
37	Build a collaboration with the Community Engagement Department for community engagement efforts that can better inform the general public on the activities and functions of the Planning and Economic Development Department.	1, 3, 4, 5, 7	Med	Q4 2025, Ongoing

## Appendix B: Current State Assessment

This current state assessment outlines the organization, structure, and staffing of the development review staff in the Planning & Economic Development Department, Water Development Review Division, Transportation and Public Works Department, and Fire Department’s Fire Prevention Division. Each of these departments and divisions are involved in the development review process for Santa Rosa and the following assessment will be used to inform the creation of the development strategic plan.

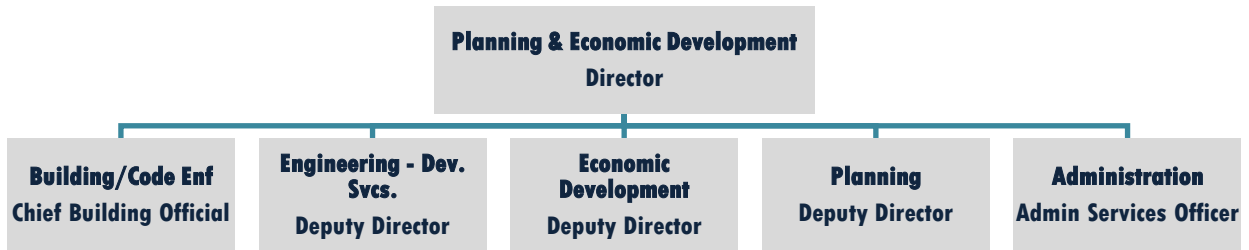
The information contained in the current state assessment has been developed through a series of interviews conducted at all levels of the organization, including managers, supervisors, and line-level staff from all departments and divisions. This document is accurate as of December 1, 2023.

### 1. PLANNING AND ECONOMIC DEVELOPMENT

The Planning and Economic Development Department is responsible for providing and administering the development review process and providing development-related services to developers, residents, and other parties interested in building within the City of Santa Rosa. The Department facilitates the planning entitlement, engineering, and building permitting functions for the City. Additionally, the Economic Development Division functions are housed in the Department.

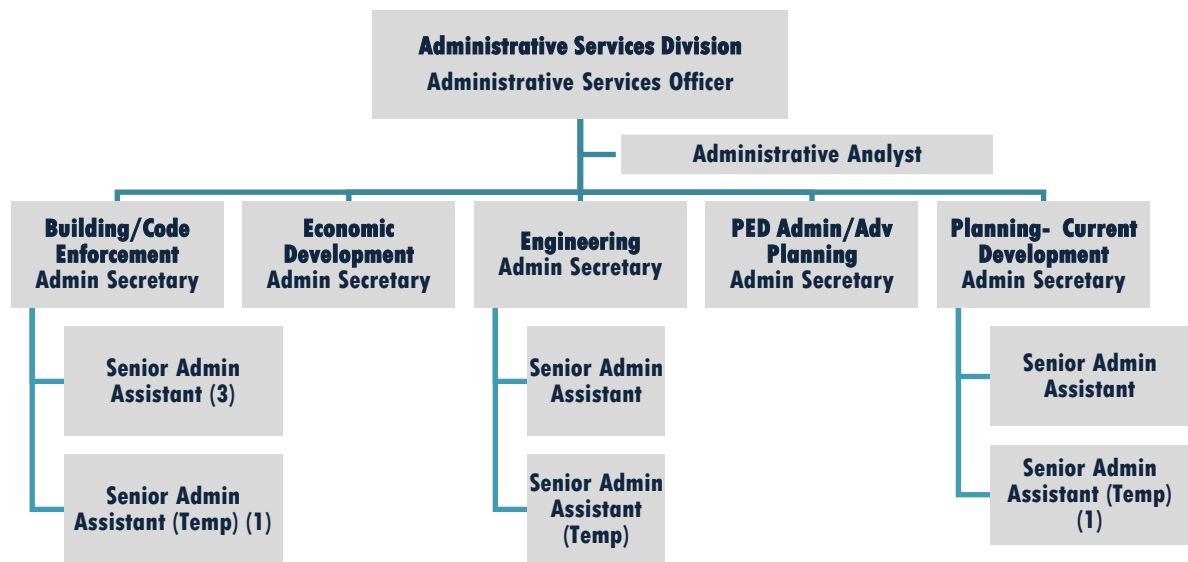
#### 1. Department Structure

The Planning and Economic Development Department is comprised of five divisions: Building/Code Enforcement, Engineering – Development Services, Economic Development, Planning, and Administration. The following chart depicts the department’s structure:



#### 2. Administrative Services Division

The Administrative Services Division staffs an Administrative Services Officer, Administrative Analyst, one Administrative Secretary per PED division, as well as several Senior Administrative Assistants who support the Administrative Secretaries. The Administrative Services Division oversees all financial and personnel resources, along with providing direct support for each PED division. The following chart depicts the division’s structure by position:

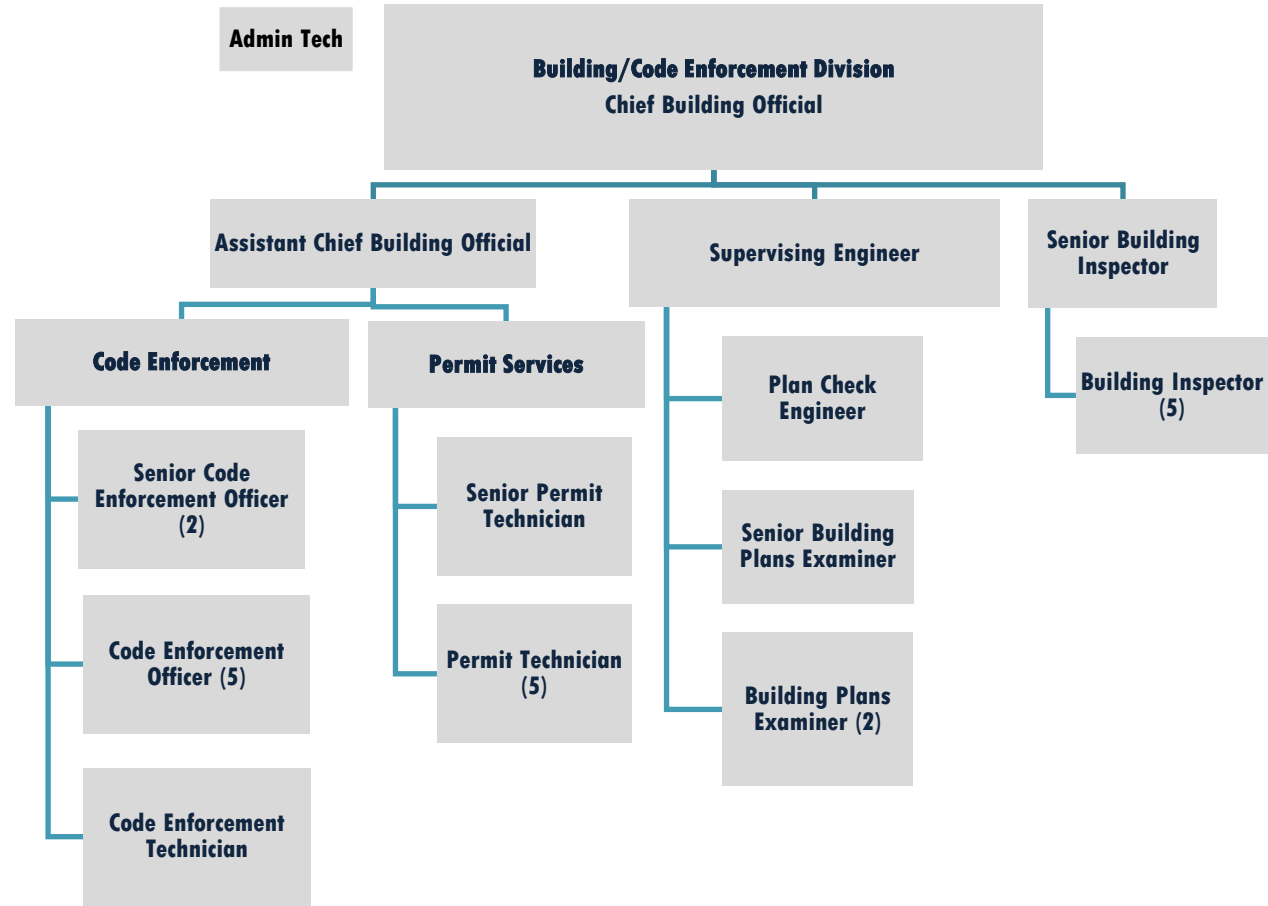


The following table summarizes the staffing allocation of the Administrative Services Division.

Administrative Services Division	
The Administrative Services Division supports the operations of the Planning & Economic Development department in its administrative tasks, clerical support, scheduling, and other supporting roles and responsibilities.	
Position Title:	Number of Positions:
Admin Services Officer	1
Admin Analyst	1
Admin Secretary	5
Senior Admin Secretary	5
Total	12

3. Building/Code Enforcement Division

The Building/Code Enforcement Division of the Planning & Economic Development Department is staffed by a Chief Building Official, Assistant Chief Building Official, and is comprised of four sections: Code Enforcement, Permitting Services, Inspections, and Plan Review. An Administrative Secretary and three Senior Administrative Assistants are assigned to the division. The following chart depicts the division’s structure by position:



The following table summarizes the staffing allocation of the Building and Code Enforcement Division.

Building/Code Enforcement	
The Building/Code Enforcement Division is comprised of four main groups: Code Enforcement, Permit Services, Plan Review, and Building Inspection.	
<ul style="list-style-type: none"><li>– Permit Services is responsible for the intake and routing of all applications for PED. Upon review and approval of building permit applications, the team will intake the appropriate permit fees and issue a building permit.</li><li>– The Plan Review team reviews building permit applications and plan sets for compliance with the adopted building codes and standards.</li><li>– Building Inspectors are responsible for conducting inspection of new construction for compliance with the adopted codes and standards.</li><li>– Code Enforcement is tasked with proactive and reactive property maintenance and zoning related investigations. Code Enforcement is excluded from this study.</li></ul>	

Position Title:	Number of Positions:
Chief Building Official	1
Assistant Building Chief Official	1
Supervising Engineer	1
Admin Technician	1
Senior Building Inspector	1
Building Inspector	5
Plan Check Engineer	1
Senior Building Plans Examiner	1
Building Plans Examiner	2
Senior Permit Technician	1
Permit Technician	5
Senior Code Enforcement Officer	2
Code Enforcement Officer	5
Total	27

The following table summarizes the number of building plan reviews conducted by type.



Building Permit Plan Reviews

Plan Review Type	2021	2022
Non-Residential		
Addition-Alteration	387	290
Demolition	10	11
Electrical	80	67
Mechanical	59	63
New	24	13
Plumbing	35	45
Pool-Spa	4	11
Sign	72	69
Site Grading	7	13
Non-Residential Total	678	582
Post Disaster		
Addition-Alteration	27	4
Demolition	5	1
Electrical	9	3
Mechanical	12	
New	143	99
Plumbing	4	
Pool-Spa	6	4
Site Grading	21	1
Post Disaster Total	227	112
Residential		
Addition-Alteration	3,612	3,824
Demolition	24	9
Electrical	998	824
Mechanical	1,349	1,148
New	254	379
Plumbing	634	724
Pool-Spa	64	74
Site Grading	13	18
Residential Total	6,948	7,000
Total	7,853	7,694

The following table summarizes the number of building inspections completed by type.

Building Inspections

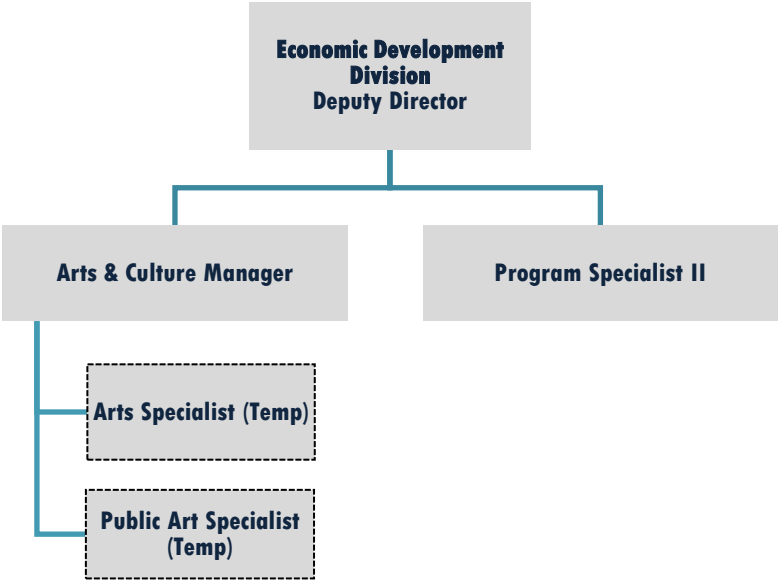
Inspection Type	2021	2022
100 Setbacks	299	243
101 Footings and Rebar	493	438
102 Grade Beam - Steel	60	37
103 Post Tension Foundation	267	158
104 Retaining Wall	58	46
105 Piers	109	118
106 Garage Slab	76	92
107 Structural Slab	74	75
108 Concrete Masonry Units	6	2
109 Under Floor - Slab Plumbing	453	319
110 Under Floor - Slab Electrical	37	31
1100 Initial Evaluation	1	
111 Under Floor - Slab Mechanical	21	7
112 Under Floor Frame	146	121
113 Sewer Line	454	310

Inspection Type	2021	2022
114 Water Line	481	291
115 Subgrade Plumbing	53	44
1150 Miscellaneous Inspection	10	1
116 Grading	1	3
117 Storm Water Compliance	110	162
1170 On Site Meeting		
118 Hold-Downs	210	236
119 Exterior Shear-Hardware	512	419
120 Roof Nail	543	470
121 Rough Plumbing (DWV-Water Test)	815	693
122 Rough Electrical	863	755
123 Rough Mechanical	678	550
124 Rough Frame	809	708
125 Other Frame	77	58
126 Reroof	999	799
127 Hydronic Plumbing	9	1
129 Pre-Construction	29	33
130 Lath	213	221
131 Insulation	223	174
132 Floor Diaphragm	7	9
1321 ROW Debris/Storage Container		
133 Firewall	44	21
134 Interior Shear	185	153
1347 General Site Inspection	1	
135 Drywall	749	647
136 Gas Test	597	357
137 Showerpan Test	322	238
138 Underground Gas Line	79	35
139 Water Heater	325	320
140 Solar Plumbing	1	
142 Other Plumbing	15	20
143 Mobile Home Setup	4	2
144 Interior Accessibility	4	3
146 Final Accessibility	17	14
147 Pre-Gunite	46	64
148 Pre-Deck	44	63
149 Pre-Plaster - Barrier - Alarms	51	64
151 Ufer Ground	367	284
153 Underground Conduit	90	91
154 Suspended Ceiling - T-Bar	46	34
155 Above T-Bar Electrical	2	4
156 Above T-Bar Mechanical	1	3
157 Above T-Bar Plumbing	1	3
158 Solar Panels Electrical	6	19
159 Solar Panels Plumbing	1	3
160 Solar Panels - PV Systems	937	1,064
161 Electrical Sign	25	17
162 Other Electrical	67	56
163 Flashing/Waterproofing	152	122
164 Wet Wall	66	42
166 AC Compressor	501	382
167 Furnace Installation	607	563
168 Commercial Hood	1	5
169 Other Mechanical	35	43

Inspection Type	2021	2022
171 Final Gas Meter	485	298
172 Demolition	52	51
175 Site Accessibility	13	10
177 Public Art Completed	1	2
178 Fire and Life Safety Site Inspection	6	2
179 Special Inspection	13	4
180 Other Miscellaneous	104	110
181 Final Electrical Meter	1,486	1,204
182 Backflow	194	113
183 Environmental Compliance	1	
184 Public Works		
1844 Stop Work Order		
187 Fire Department	205	155
189 Final Building	3,108	2,581
190 Final Electrical	2,882	2,375
191 Final Plumbing	1,388	1,020
192 Final Mechanical	1,847	1,376
193 Temporary Certificate of Occupancy	211	141
194 Certificate of Occupancy	40	23
195 Permit Final	6,626	6,491
196 Water Conservation	2	
197 Special Insp Final Affidavit		
198 Final Grading	6	20
199 Permit Extension	7	4
201 Final Pool	54	55
202 Smoke and CO Alarm Verification	1,674	1,176
203 SWLID Pre-Installation		
204 SWLID 50% Installation		
205 SWLID Final Installation		
401 Close-In Combination Inspection	48	57
402 Final Combo		49
702 Fire Building Final		
727 Energy Storage System Final		
754 Other Fire		
Total Inspections Completed	35,038	29,677

4. Economic Development Division

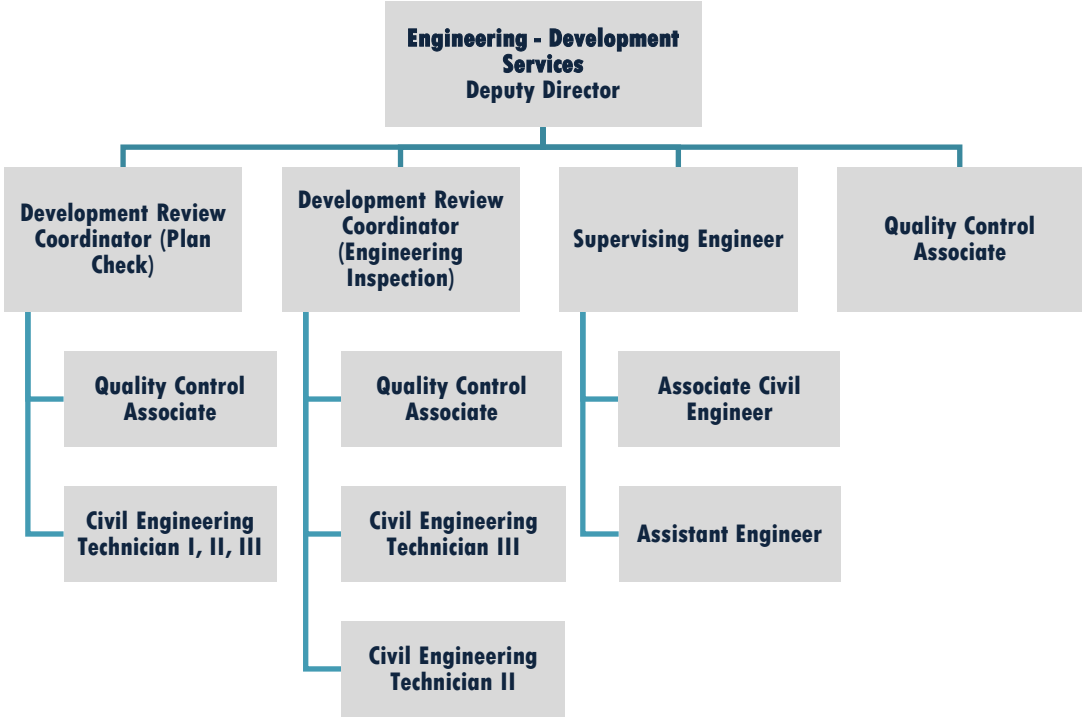
The Economic Development Division is staffed by a Program Specialist, Arts & Culture Manager, under the purview of a Deputy Director. An Administrative Secretary is assigned to the division. The following chart depicts the structure of the division:



Economic Development	
The Economic Development Division is responsible for supporting the growth and development of the City through supporting recruiting and retention efforts for local businesses. This division also houses the Arts & Culture Manager, who is responsible for the Public Art program.	
<u>Position Title:</u>	<u>Number of Positions:</u>
Deputy Director	1
Program Specialist II	1
Arts & Culture Manager	1
Total	3

5. Engineering – Development Services

The Engineering Development Services Division of the Planning & Economic Development Department is staffed by plan check and engineering inspection development review coordinators, civil engineers, and quality control associates. The following graph depicts the division’s structure:



The following table summarizes the staffing allocation of the Engineering Development Services Division.

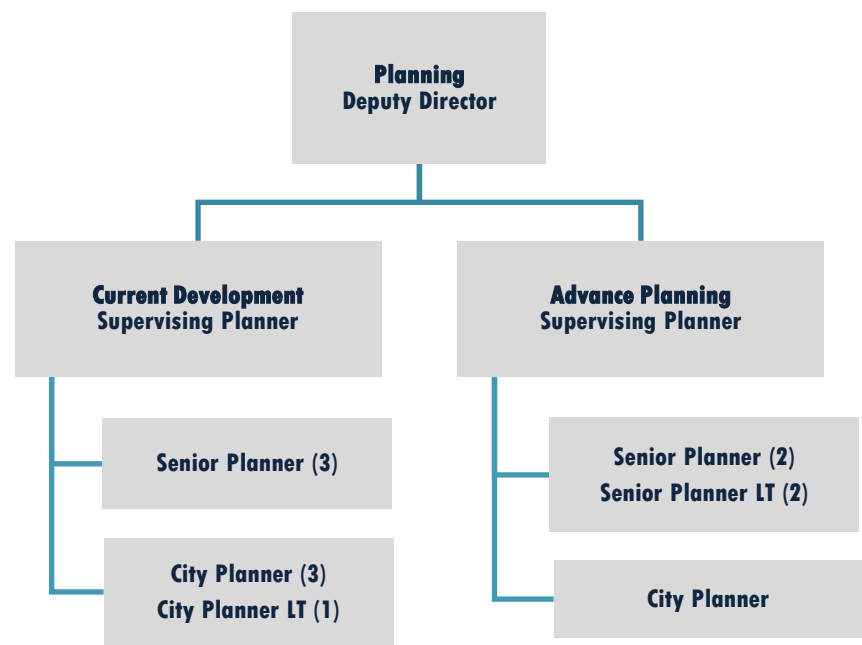
Engineering – Development Services
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The Engineering Development Division reviews development proposals to ensure that streets and utilities are designed to meet all applicable design standards, codes and regulations. The division also inspects the construction of approved public improvement plans and oversees subdivision grading and all construction within the existing and future public right-of-way.

<u>Position Title:</u>	<u>Number of Positions:</u>
Deputy Director	1
Supervising Engineer	1
Associate Civil Engineer	1
Assistant Civil Engineer	1
Development Review Coordinator	2
Quality Control Associate	3
Civil Engineering Technician II	1
Civil Engineering Technician III	5
Total	15

6. Planning Division

The Planning Division of the Planning & Economic Development Department is broken into Current Development and Advance Planning teams. Both groups are staffed by Supervising, Senior and City Planners, and the division is headed by a Deputy Director. Administrative Secretaries and a Senior Administrative Assistant are assigned to the division. The following graph depicts the division’s structure:



The following table summarizes the staffing allocation of the Planning Division.

Planning	
The Planning Division is responsible for administering land use, zoning, and site development regulations as a part of the development review process. The Planning Division also handles long-range planning efforts such as the development of specific plans, general plan updates, housing and land use legislation implementation and other policy related work.	
<u>Position Title:</u>	<u>Number of Positions:</u>
Deputy Director	1
Supervising Planner	2
Senior Planner	5
Senior Planner - Limited Term	2
City Planner	4
City Planner - Limited Term	1
Total	15

The Planning Division is responsible for current development and long-range planning activities. Current development functions include customer service, Zoning Code and

General Plan interpretation and administration, the processing of entitlement applications such as sign permits, tree removal permits, short-term rental permits, subdivision maps, rezonings and land use amendments, design review, temporary and conditional use permits, and hillside development and landmark alteration permits, along with plan review and miscellaneous projects. The following table provides an overview of the historic workload.

Current Planning Workload

Application Type	2021	2022
Entitlements	806	786
Plans and Projects	3	1
Project	29	24
Short Term Rental	212	85
Total	1,050	896

The following table provides a detailed overview of the entitlement applications reviewed.

Entitlement Workload

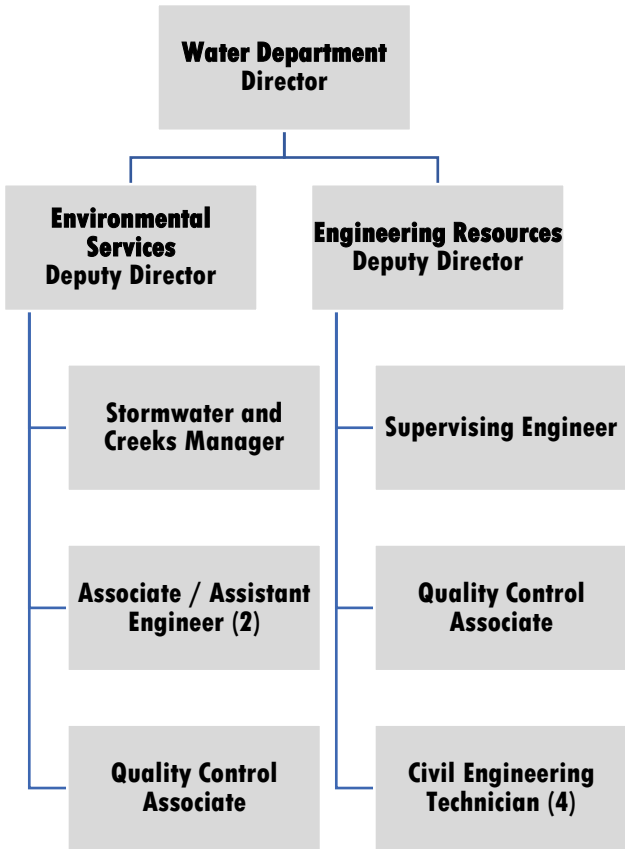
Entitlement Type	2021	2022
Annexation	2	0
Certificate of Compliance	0	5
Conditional Use	98	74
Density Bonus	6	4
Design Review	66	52
Extension Request	5	19
General Plan Amendment	1	1
Hillside Development	12	15
Landmark Alteration	22	18
Lot Line Adjustment	25	9
Lot Merger	8	2
NA	241	109
Pre-Application Meeting	54	41
Public Convenience - Necessity	1	4
Rezoning	3	4
Sign	83	80
Study File	3	1
Subdivision	11	8
Tree Removal	88	87
Utility Certificate	5	0
Vacation	4	3
Zoning Clearance	312	359
Zoning Code Variance	0	1
Total	1,050	896

## 2. WATER DEPARTMENT – WATER DEVELOPMENT REVIEW

The Water Development Review division is responsible for administering water-related land development codes and ordinances through the development review process. This includes ensuring compliance with water, sewer, and stormwater infrastructure and management standards set by the City of Santa Rosa.

### 3.1 Division Structure

The following graphic outlines the organizational structure for Water Department staff involved in development review.



### 3.2 Division Staffing

The following table summarizes the staffing allocation of Water Department staff involved in the development review process.

Engineering Resources/Services	
The Engineering Services division of the Water Department is responsible for water-related development reviews such as water, wastewater, stormwater and drainage plans. These tasks primarily fall to the Supervising Engineering and Civil Engineering Technician.	
Position Title:	Number of Positions:
Deputy Director	2
Supervising Engineer	1
Stormwater & Creeks Manager	1
Quality Control Associate	1
Associate/Assistant Engineers	2
Civil Engineering Technician	4
<b>Total</b>	<b>11</b>

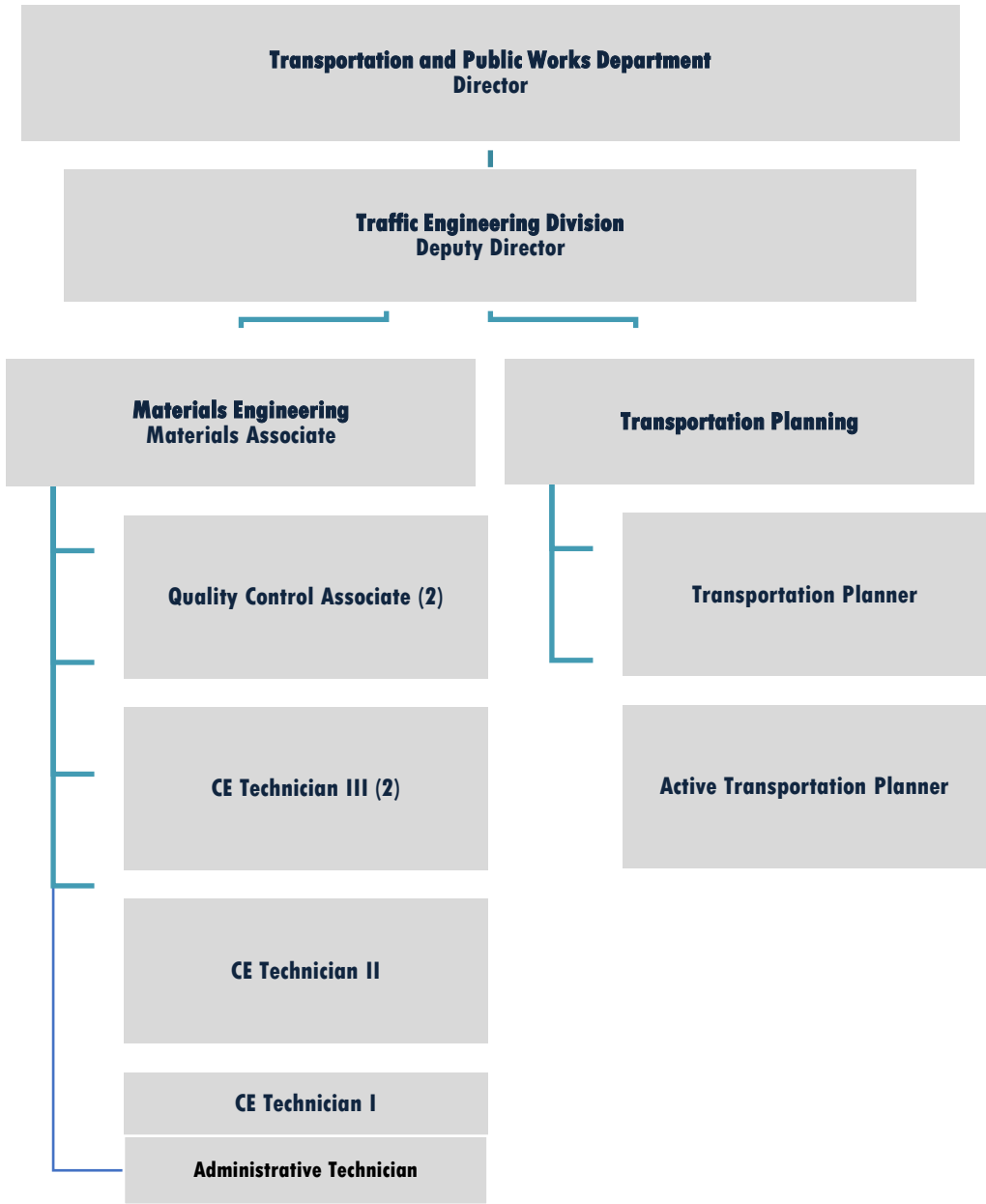


### 3. TRANSPORTATION AND PUBLIC WORKS

The Traffic Engineering division of the Public Works Department is responsible for development review, transportation planning, and regional transportation cooperation. The Traffic Engineering Division is comprised of five main groups: Materials Engineering, Transportation Planning, Electrical/Traffic Signals, Facilities Maintenance & Operations, and a fifth group headed by the Associate Traffic Engineer which is comprised of technicians. Only Materials Engineering and Transportation Planning staff are involved in development review process, and they are the only Transportation and Public Works Department work group included in the strategic plan.

#### 4.1 Division Structure

The following graphic outlines the organizational structure for the Transportation and Public Works staff involved in development review.



#### 4.2 Division Staffing

The following table summarizes the staffing allocation of Transportation and Public Works Department staff involved in the development review process.

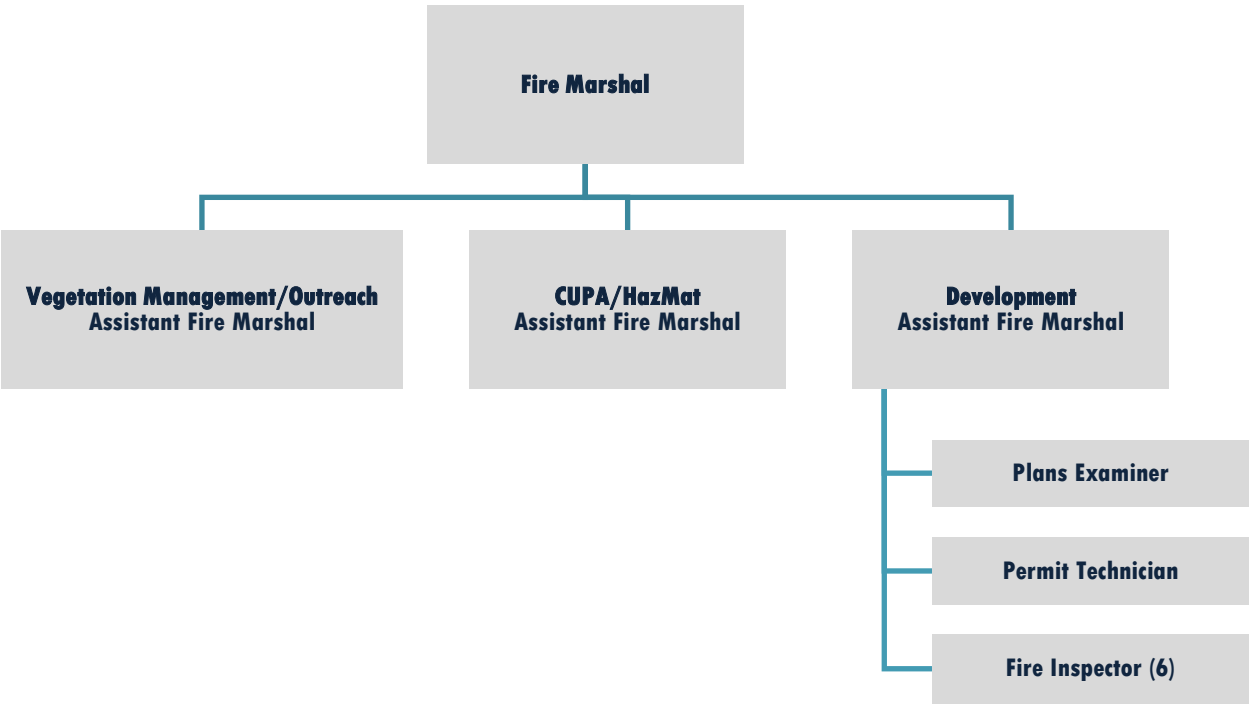
Traffic Engineering Division	
The Materials Lab is responsible for reviewing development applications for compliance with adopted City development standards. Additionally, the Lab will conduct inspections of new construction of roadways and sample test appropriate materials.	
Transportation Planning is tasked with reviewing traffic impact analysis reports and review development applications for compliance with adopted codes and standards and integration into the regional transportation planning efforts. They may also assist with review of signal layouts/systems in conjunction with traffic engineers.	
Position Title:	Number of Positions:
Deputy Director	1
Materials Associate	1
Quality Control Associate	2
Civil Engineering Technician III	2
Civil Engineering Technician II	1
Civil Engineering Technician I	1
Administrative Technician	1
Transportation Planner	1
Active Transportation Planner	1
Total	11

## 4. FIRE DEPARTMENT – FIRE PREVENTION DIVISION

In the context of the development review process, the Fire Prevention Division is responsible for ensuring that new development complies with existing fire and safety regulations set forth by the City of Santa Rosa. This includes ensuring new roads meet dimensional standards for emergency vehicles, new construction meets fire safety standards, and any other fire-related concerns that may present during the development review process.

### 5.1 Division Structure

The following graphic outlines the organizational structure for the Fire Prevention Division.



### 5.2 Division Staffing

The following table summarizes the staffing allocation of the Fire Prevention Division.

Fire Prevention Division - Development	
The Fire Prevention Division is tasked with plan review and inspection for all new development activities. The Development team is tasked with conducting plan review for all new commercial building applications, hazardous materials, and fire sprinkler/suppression/alarm applications. Inspectors conduct inspections for new construction and renovation of commercial buildings for compliance with adopted life safety and fire codes.	
Position Title:	Number of Positions:
Fire Marshal	1
Deputy Fire Marshal	1
Plans Examiner	1
Fire Inspector	6
Permit Technician	1
Total	10

## Appendix C: Employee Survey

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The City of Santa Rosa contracted the Matrix Consulting Group to develop a strategic plan for the City’s development services functions that are primarily facilitated by the Planning and Economic Development Department. As part of the strategic plan development, the project team hosted a survey that sought direct input from staff on a variety of topics relevant to current operations. This report serves as a summary analysis of the responses received from staff.

### 1. Survey Background and Key Findings

The survey was designed in SurveyMonkey by the Matrix Consulting Group. A survey URL was distributed to 88 members of staff between in June of 2023. The survey received a total of 77 responses for a response rate of 87.5%.

Analysis of survey responses resulted in the following key findings:

- **Positive Responses:** The multiple-choice section of the survey received mostly positive responses from staff. On average, respondents indicated agreement (strongly agree/agree) 81.3% of the time and disagreement (strongly disagree/disagree) 16.5% of the time. Only two statements received disagreement levels exceeding 40%. These related to how easy the City’s code/ordinances are to understand and the current staffing levels.
- **Differences by Division:** As shown in section 3.1.1 of this report, staff within Administration and Economic Development consistently provided much lower agreement levels towards several statements.
- **Workload:** 48.5% of respondents indicated feeling busy but able to manage their workload. 42.4% indicated that they were unable to keep up with their current workload. Analysis of how different divisions responded to this question shows that workload is perceived as high irrespective of work group. Furthermore, those in managerial/supervisory positions indicated a much less manageable workload compared to those in non-supervisory roles.
- **Resource Needs:** Software/Technology improvements, office equipment, and staffing were the most common resource categories requested by participants.
- **Opportunities for Improvement:** The most common suggested improvement opportunity related to communication. Specifically, improving the level of communication, collaboration, and cross-training between different divisions and departments involved in the development process. A need for more staffing, technology improvements, and documentation were also frequently mentioned.
- **Strengths:** By far the most common strength of the department (as per respondents) was the current staff. Comments pointed to the general attitude, knowledge, communication skills, and sense of teamwork found among their coworkers. Leadership, work processes, and recent technology improvements were also often mentioned.

2. Respondent Demographics

While the survey was anonymous, respondents were asked to identify their main work group, type of position (supervisory/non-supervisory), and how long they had worked for the City. These statements are used later in the report to understand how different respondent groups reacted to the survey.

Which Division/Department do you allocate the majority of your time to?	Number of Respondents	% of Total
Planning and Economic Development - Administration & Economic Development	9	11.8%
Planning and Economic Development - Building	23	30.3%
Planning and Economic Development - Engineering	14	18.4%
Planning and Economic Development - Planning	16	21.1%
Fire Department - Fire Prevention	7	9.2%
Public Works / Transportation / Water Utilities	5	6.6%
Other	2	2.6%
Total	76	

Respondents were most likely to allocate the majority of their time to the Building Division withing Planning and Economic Development. Planning and Engineering were the second and third most common responses. One respondent skipped this question.

What best describes your position?	Number of Respondents	% of Total
Management/supervisory	25	32.5%
Non-supervisory	52	67.5%
Total	77	

The majority of respondents (67.5%) identified themselves as working in non-supervisory positions.

How long have you worked for the Division?	Number of Respondents	% of Total
Less than one year	13	16.9%
One to five years	24	31.2%
Five to ten years	16	20.8%
11 or more years	24	31.2%
Total	77	

The two most common respondent groups were those that had worked for the City for either one to five years (31.2%) or 11 or more years (31.2%). There was a nearly even split between staff that had been with the City less than five years or longer than five years. Indicating strong turnover for the development functions since 2017.

3. Multiple Choice Questions

Participants were asked to respond to a series of statements related to their day-to-day experience working for the Department. These statements dealt with concepts such as training, communication, culture, and more. Respondents were able to “strongly agree”, “agree”, “disagree”, or “strongly disagree” with each statement. This section received input from up to 67 respondents, with ten skipping the section entirely.

3.1. Overall Responses

The table below summarizes responses to this section from all respondents. Later sections of the report will look at how responses varied based on team, position, and length of tenure.

#	Statement	SA	A	D	SD
1	Our department has a defined mission.	32.8%	59.7%	7.5%	0.0%
2	The mission of my department is important.	46.3%	52.2%	1.5%	0.0%
3	My work is important in fulfilling the mission.	53.9%	43.1%	3.1%	0.0%
4	I clearly understand my role in the development process.	44.6%	50.8%	3.1%	1.5%
5	I generally understand the role of other departments/divisions in the development process.	23.9%	65.7%	10.5%	0.0%
6	The requirements I am responsible for enforcing through the development process are clear and are in line with the mission of by division/department.	30.8%	60.0%	7.7%	1.5%
7	The City's adopted code/ordinance/standard is easy to understand.	7.5%	47.8%	40.3%	4.5%
8	Staff from different departments/divisions collaborate during the development process.	16.9%	64.6%	16.9%	1.5%
9	I have the tools (technology and other) to do my job.	21.2%	63.6%	10.6%	4.6%
10	I am provided effective training to do my job.	22.4%	49.3%	22.4%	6.0%
11	I have sufficient training to correctly answer the questions I receive from the public about our development codes and ordinances.	16.4%	56.7%	23.9%	3.0%
12	I have sufficient knowledge to correctly answer questions I receive from the public about the development process.	20.0%	60.0%	18.5%	1.5%
13	I provide a high level of customer service.	60.6%	34.9%	4.6%	0.0%
14	I am able to stay on top of my duties given current staffing and workload.	17.9%	38.8%	29.9%	13.4%
15	I receive praise or recognition for my work.	41.8%	43.3%	14.9%	0.0%
16	I feel supported by my supervisor when an issue arises.	55.2%	37.3%	4.5%	3.0%
17	When I have competing priorities in my job, my supervisor is able to guide me on what is most critical.	41.8%	44.8%	10.5%	3.0%
18	I enjoy my job.	38.8%	44.8%	14.9%	1.5%
19	City Management and Elected Officials are supportive of my department's mission.	13.4%	62.7%	14.9%	9.0%

#	Statement	SA	A	D	SD
20	I have a good work/life balance.	25.4%	56.7%	13.4%	4.5%

As shown by the table, very few statements received high levels of disagreement. On average, 83.5% of respondents either strongly agreed or agreed with each statement. This is further shown by looking at overall agreement (strongly agree and agree combined) for each statement. All but two statements received overall agreement levels exceeding 70%.

Statements that received the strongest agreement ratings related to the importance of the department and each individual’s position in the development process (#2, #3), the customer service provided by the department (#13), and support from supervisors (#15, #16, #17).

44.8% of respondents indicated that the City’s adopted code, ordinances, and/or standards are not easy to understand. 43.3% indicated that they are unable to keep up with their duties under the current staffing and work demands. These statements received the highest levels of disagreement overall.

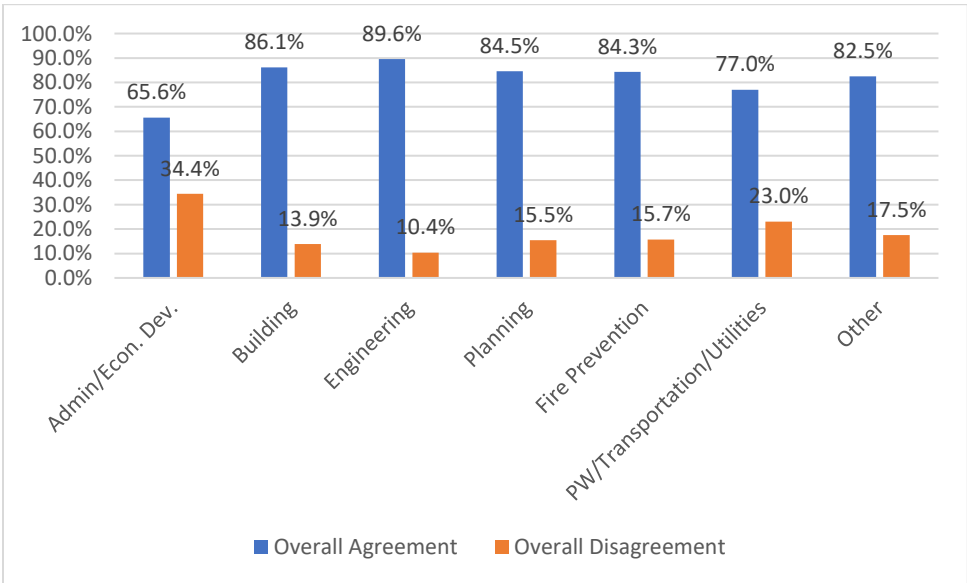
No other statement received overall disagreement higher than 30%, though four statements had disagreement levels exceeding 20%. Three of these dealt with training. 28.4% felt they did not receive effective training to do their job (#10), 26.9% indicated that they were not able to field questions related to the City’s code (#11), and 20% noted feeling unequipped to answer questions related to the process (#12). Finally, 23.9% of respondents felt unsupported by City Management and/or elected officials (#19).

It is worth noting that four of the six statements that received higher levels of disagreement relate to the complexity of the code and/or development process in the City and staff’s ability to understand and convey this information to the public.

3.1.1 Differences by Division

This subsection notes any potential differences in responses to the multiple-choice section based on which division the respondent indicated spending the majority of their time with. The first table below shows the average level of agreement and disagreement for each division.

Average Agreement/Disagreement Rate (All Statements) by Division



Regardless of division, most respondent groups had “strongly agree” or “agree” as their most common response to all statements. Those who mostly spent time with the



Administration and Economic Development division were more likely to disagree with statements (and subsequently have lower levels of agreement) compared to other respondent groups. Engineering staff had the highest average level of agreement.

The following passage highlights questions where one or more discrepancies were noted when analyzing the data at this level. Note that overall agreement (strongly agree/agree combined) and disagreement (strongly disagree/disagree combined) is used as a basis for analysis.

**Statement #1: Our department has a defined mission.**

All respondent groups provided an overall agreement rating of 90% or higher towards this statement, except for those in Administration and Economic Development. 57.2% of respondents in this group agreed while 42.9% disagreed.

**Statement #5: I clearly understand the role of other departments/divisions in the development process.**

60% of those that indicated spending the majority of their time in the Public Works/Transportation/Water Utilities divisions agreed with this statement, while 40% disagreed. This statement received 89.6% agreement overall.

**Statement #6: The requirements I am responsible for enforcing through the development process are clear and in line with the division/department's mission.**

This statement received 90.8% agreement overall but received slightly lower levels of agreement from respondents within Planning. 72.7% of these respondents agreed with this statement.

**Statement #7: The City's adopted code/ordinances/standards are easy to understand.**

Responses towards this statement were mixed. Engineering, Fire Prevention, and Public Works/Transportation/Water Utilities staff each provided agreement ratings of 70% or higher. Conversely, those within Administration and Economic Development, Building, Planning, and those that selected Other all provided agreement ratings of 50% or lower. Planning had the lowest level of agreement at 36.4%.

**Statement #9: I have the tools (technology and other) to do my job.**

This statement received 84.9% agreement overall. This rating was much lower among those in the Administration and Economic Development division, which provided 57.2% agreement.

**Statement #11: I have sufficient training to correctly answer the questions I receive from the public about our development codes and ordinances.**

This statement received 73.1% agreement overall. Agreement was lower among those in Administration and Economic Development (42.9%), Public Works/Transportation/Water Utilities (60%), and those that selected Other (50%).

**Statement #12: I have sufficient knowledge to answer questions I receive from the public about the development process.**

Statement #12 received 80% agreement overall. Similarly, agreement was lower among those in Administration and Economic Development (42.9%), Public Works/Transportation/Water Utilities (60%), and Other (50%).

**Statement #13: I provide a high level of customer service.**

This statement received 100% agreement from all respondent groups except for Administration and Economic Development. This group provided 57.2% agreement towards this statement.

**Statement #14: I am able to stay on top of my duties given current staffing and workload.**

This was one of the less positively received statements overall, garnering 56.7% agreement and 43.3% disagreement. 90.1% of Planning staff indicated feeling able to manage their workload, while all other respondent groups noted agreement ratings lower than 60%. Administration and Economic Development had the lowest agreement score at 28.6%.

**Statement #18: I enjoy my job.**

This statement received 83.6% agreement overall, which is reflected at the respondent group level. All but one respondent group provided overall agreement exceeding 70%. Administration and Economic Development was the only group to provide a disagreement rating exceeding 50% - 57.2% disagreed with this statement.

**Statement #19: City Management and Elected Officials are supportive of my department’s mission.**

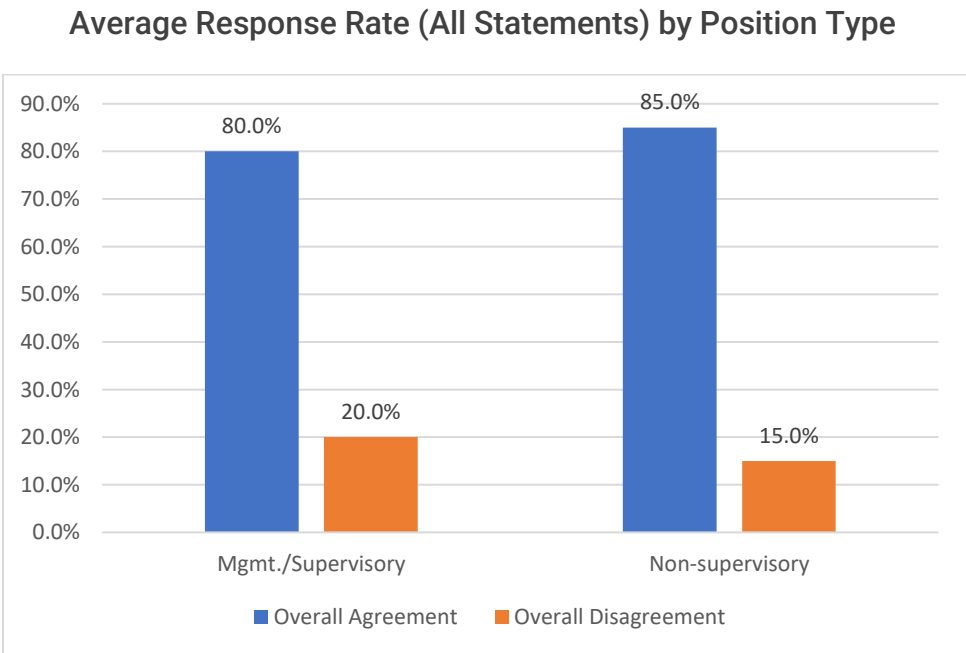
While 76.1% of respondents agreed with this statement, levels of agreement were lower among Administration and Economic Development staff (57.1%), Planning staff (45.5%), and Public Works/Transportation/Water Utilities staff (60%).

**Statement #20: I have a good work/life balance.**

57.1% of Administration and Economic Development staff agreed with this statement, while all other respondent groups provided agreement of 70% or higher. Overall agreement towards statement #20 was 82.1%.

**3.1.3 Differences by Position Type**

The following graph summarizes the average response rates based on whether the respondent identified their position as managerial/supervisory or non-supervisory:



As shown by the table, both respondent groups were similarly aligned in terms of average response rate. On average, non-supervisory positions were slightly more likely to indicate agreement with a statement (85%) compared to those in leadership roles (79.5%).

Analysis of each question based on these position groups also showed that each group provided very similar agreement/disagreement ratings per question. Generally, each group’s responses were within 5% - 10% of each other. However, the following statements received notably different responses depending on the position type:

**Statement #12: I have sufficient knowledge to correctly answer questions I receive from the public about the development process.**

82.2% of non-supervisory staff agreed with this statement, compared to 66.7% of managerial/supervisory staff.

**Statement #14: I am able to stay on top of my duties given current staffing and workload.**

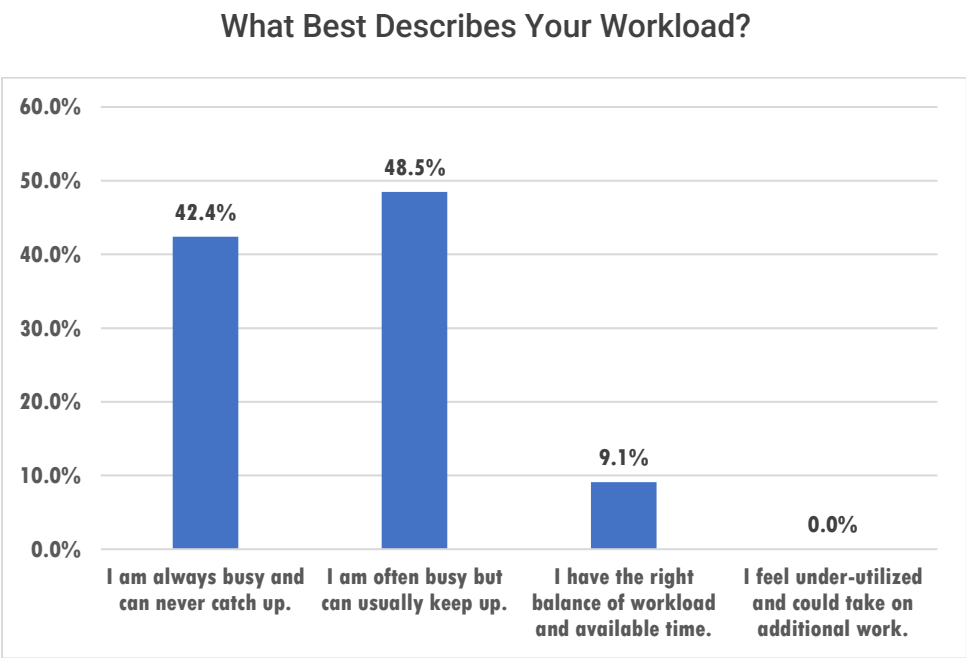
This statement had the greatest disparity between respondent groups. 28.6% of those with managerial/supervisory positions agreed compared to 69.6% of non-supervisory staff.

**Statement #20: I have a good work/life balance.**

Similarly, 66.7% of managers/supervisors agreed with this statement compared to 89.1% of non-supervisory roles.

3.2. Workload

Respondents were asked to indicate their perceived individual workload by selecting one of four statements. 66 respondents provided input for this question. Results are shown in the table below:



Respondents were slightly more likely to indicate feeling busy but able to manage their workload, with 48.5% selecting this response. A similar number of participants perceived their workload as unmanageable, with 42.4% indicating they could not keep up with their current duties. 9.1% felt they had a balanced workload, and no respondents felt underutilized.

A following question asked respondents to identify their key workload drivers and what is preventing them from keeping up with their assigned duties. A total of 30 participants provided written input for this statement.

The most common reason for high workload provided by respondents was the number of cases and/or projects being handled by the department. In total, 11 participants

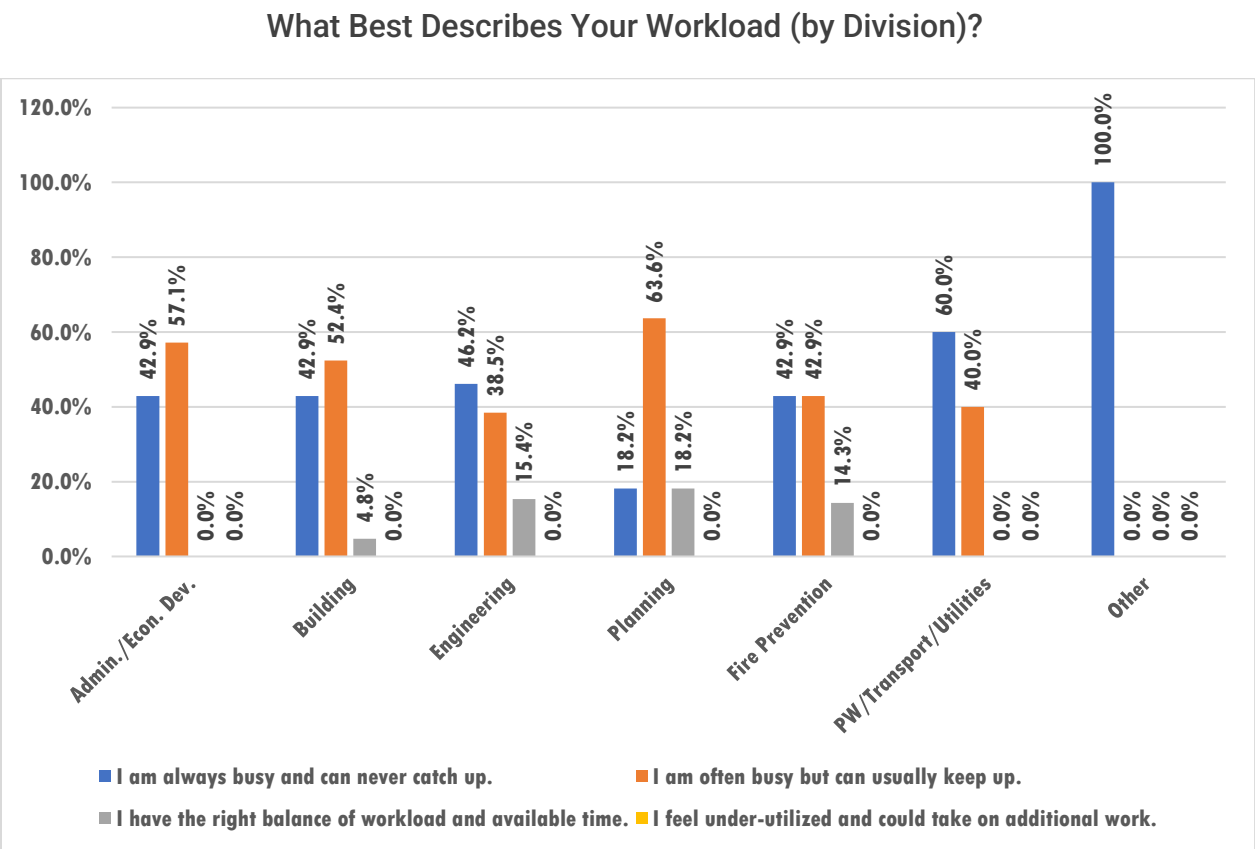
alluded to this issue. These comments noted a perception of a high number of new tasks being created for them as they try to maintain their current workload.

11 respondents noted that staffing levels were the primary culprit for their imbalanced workload. These comments generally referred to staffing levels being below projected annual workload and/or noted turnover in their division/department. Some commenters noted that they are taking on work for currently vacant positions. Two further comments remarked that staffing levels were an issue for them historically, but they have since been remedied.

Multiple staffing and workload comments also referred to the high number of public inquiries serving as a distraction from their core duties. Many of these comments noted that the City’s website is not properly equipped to provide information to external customers which results in a noticeable number of questions being fielded by department staff. Five comments also specifically noted this issue as a key impediment to managing their workload.

3.2.1 Differences by Division

As with the multiple-choice section, responses to this question were cross-tabbed based on which division each respondent spent the majority of their time allocated to. This data is represented in the chart below:

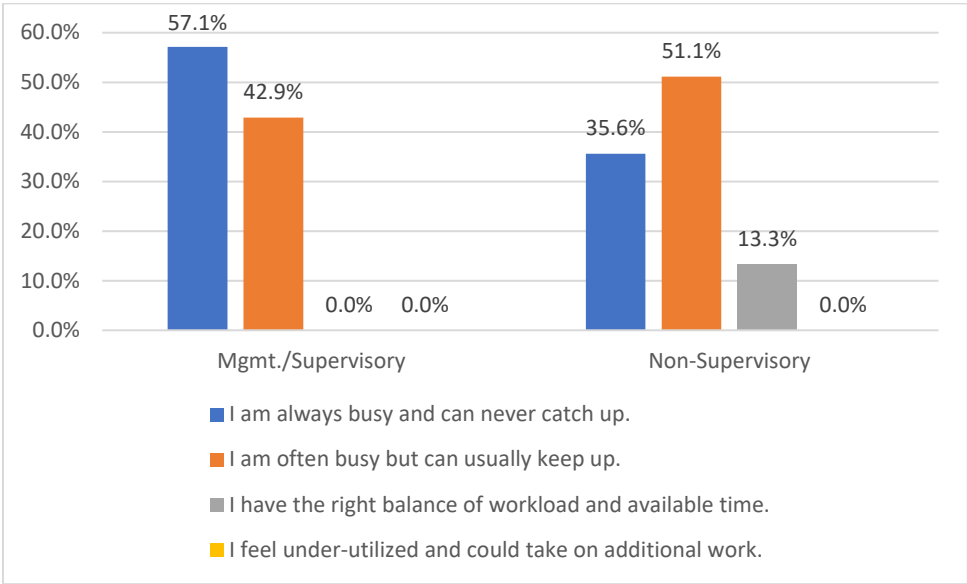


The graph shows that workload is perceived as high regardless of which division the respondent belongs to. The most common response was either “I am always busy and can never catch up” or “I am often busy but can usually keep up.” Administration and Economic Development, Building, and Public Works/Transportation/Utilities were all less likely to indicate that they had a balanced workload.

3.2.2 Differences by Position Type

Finally, differences in responses to the workload question were analyzed based on which position group the respondent belonged to. This data is shown in the graph below:

What Best Describes Your Workload (by Position Type)?



Managers/supervisors were more likely than non-supervisory staff to indicate feeling unable to manage their current workload (57.1% versus 35.6%). That being said, non-supervisory staff were still likely to indicate being busy versus having a balanced workload or feeling under-allocated.

4. Open Response Questions

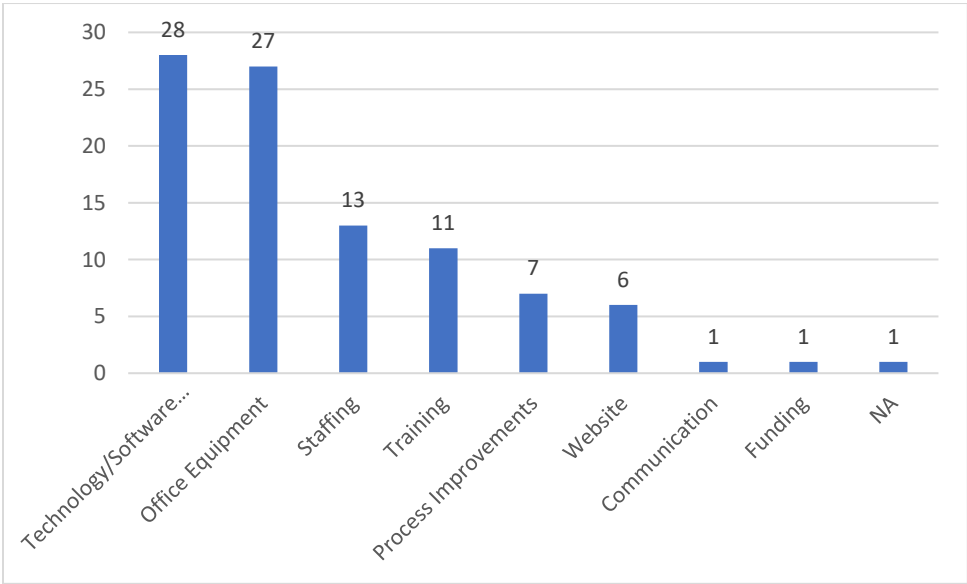
The survey concluded with three questions requiring a narrative response from participants. These each related to resource needs, opportunities for improvement, and current strengths of the department. A sentiment analysis tool was used to organize each statement into broader categories (technology, equipment, staffing, etc.). These categories were manually reviewed to ensure accuracy and to identify more specific requests, issues, and strengths mentioned by respondents.

4.1 Resources, Equipment, and Technology

Participants were asked up to three resource needs that would improve their ability to perform their key duties. This section received a total of 95 comments from 41 respondents.

As noted before, these comments were organized into broad categories based on main “theme” of the response. This data is presented in the chart below:

Resource Needs by Category



The two most commonly requested needs were technology/software improvements and office equipment. These categories accounted for 55 comments in total.

The technology/software improvements category captured a broad range of improvements of this nature. Some of these comments were broad, such as “technology improvements across the board,” while some were more specific. Some specific improvements suggested by respondents included:

- Implementation of Bluebeam
- Contract management software
- A consolidated digital file storage location/archive
- Civil Engineering computer assisted design (CAD) software
- Use of software to automate current processes, like moving finalized permits to records processing and providing notifications to applicants (also see website improvements)
- Consolidating the use of Accela as the sole intake method and broadening its use

Similarly, six comments specifically referenced making improvement’s the department’s website. This included providing more high-quality information to potential applicants online, implementing a customer assistance bot to field simple inquiries, allowing for ACH payments, and providing more detailed GIS information on the website.

The second most common request related to office equipment, with 27 comments falling into this category. The following lists some of the main requests found within this group:

- Scanning equipment
- Additional desktop monitors, large enough to accommodate plan checking
- New/more powerful computers
- Laptops and other mobile devices (cell phones, tablets) for those working in the field
- Standing desks

Additional staffing was another common resource request, ranging from additional plan checkers, administrative personnel, code enforcement officers, and inspectors.

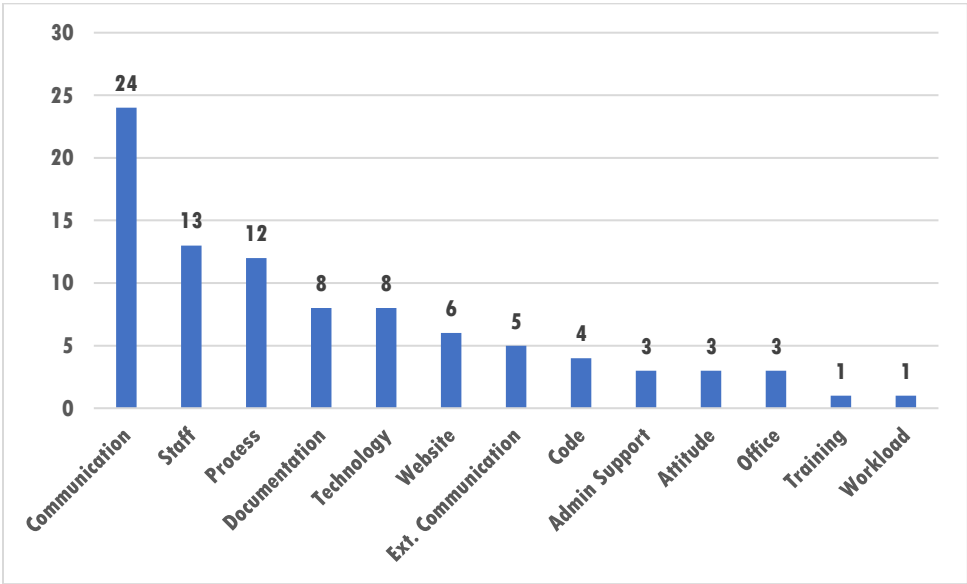
Additional training was also suggested. These were generally quite broad in their request, with the most common sentiment being “more training.” However, some respondents noted a need for training on current/future software solutions used by the department, training on the current code/ordinances in place, certification prep, and continuously updating internal policies and training manuals.

Process improvements are not necessarily a resource need, but seven comments highlighted the benefits of streamlining and consolidating the submittal, review, and tracking of applications handled by the department.

## 4.2 Opportunities for Improvement

Participants were asked to list up to three opportunities for improvement they would like to see implemented in the department. This section received 91 comments from 41 respondents. The main categories are presented in the graph below:

Opportunities for Improvement by Category



Internal communication was by and large the most commonly cited improvement category found within this section. 24 respondents noted a need for better collaboration/communications between divisions and departments in the City of Santa Rosa, with three also noting a need for better cross-training.

Similarly, five comments noted a need for better external communications (not included on the City’s website). This included leading a public education campaign, providing customer handouts in languages other than English, and increasing the availability of staff to answer process-related questions.

As was the case in the resource section, staffing was another common request identified by respondents. Some specific positions noted in this category included Planning Technicians, designated electricians/mechanical engineers and structural/civil engineers for plan review, Technology Application Specialists, and a dedicated public records coordinator. One comment also noted a need to hire more staff from the private sector.

12 comments dealt with some kind of improvement to the development process, including:

- Over the counter Fire Review
- Streamlining and/or digitizing the plan review process. Also consolidating this process into one distinct method
- Identifying staff assigned to a project at the onset and ensuring they remain on the project to its completion

Eight comments noted a need for more rigorous documentation practices. The most common sentiment in this category related to capturing and distributing the institutional knowledge currently retained by the organization. Other suggestions included developing user guides for customers, documenting interactions with applicants, and better defining department policies.

Eight comments noted a need for better use of technology. Suggestions included using Accela to better track the status of applications, providing mobile inspection capabilities, and formalizing a training program provided by IT. Similarly, six more comments suggested that the City’s/department’s website should be improved with a focus on providing up to date and accurate information to the public.

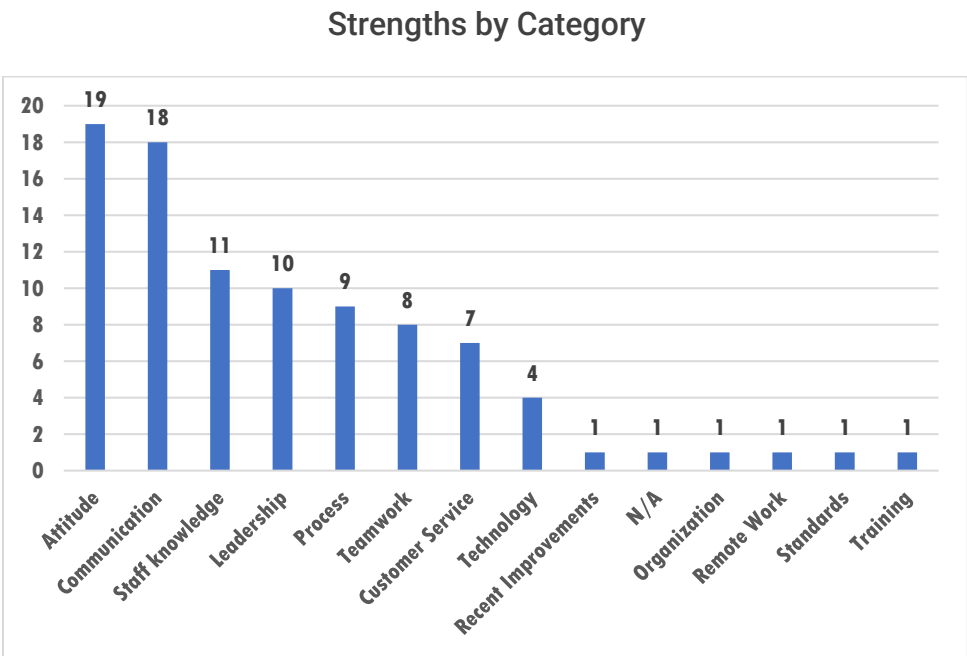
Other suggested improvements included:



- Updating the City’s code/ordinances/standards (4)
- Providing staff with additional administrative support (3)
- Improving the attitude/culture of the division to be more collaborative (3)
- Improvements to the current office facility (3)
- Additional training (1) and reduced workload (1)

4.3 Strengths

The final survey question asked respondents to identify up to three strengths of the department. This section received 92 responses from 41 participants. The main categories are presented in the graph below:



In general, many of the strengths suggested by respondents overlapped with one another and generally referred to the individuals that work at the department.

The 19 comments that referred to ‘attitude’ noted that departmental staff are positive, willing to work hard, and take pride in their work. A further seven comments noted that staff are customer-service focused.

The 18 comments under ‘communication’ noted instances of positive communication and collaboration either within or between different work teams in the department. Similarly, eight comments specifically highlighted teamwork as one of the department’s greatest strengths. This contrasts the 24 comments highlighting communication as an opportunity for improvement, though many of those comments focused on communication/collaboration with entities outside of the department.

Staff knowledge was another frequently cited strength, with 11 comments remarking on the technical ability of their coworkers and the amount of institutional knowledge retained by the department.

10 comments pointed to feeling supported by those in leadership roles, including managers and supervisors.

Those that highlighted processes as one of the department’s greatest strengths cited over the counter permit processing (and its overall efficiency), identifying backups for counter duty, pre application meetings, and the commitment to improving and streamlining current processes. A similar sentiment was found among those that dealt with technology. These comments all underscored that the department has recently

focused on improving technology solutions. One comment simply pointed out that the department has been making improvements as of late.

Other strengths included:

- The department’s organizational structure (1)
- Remote work (1)
- The City’s established standards (1)
- Training opportunities (1)

## Appendix D: Stakeholder Survey

The City of Santa Rosa contracted the Matrix Consulting Group to create a strategic business plan for its development services operations, which are primarily facilitated by the Planning and Economic Development Department. As part of this study, the project team hosted a survey that sought direct input from stakeholders on a variety of topics relevant to the engagement. This report serves as a summary analysis of the responses received from staff.

### 1. Survey Background and Key Findings

The stakeholder survey was designed in SurveyMonkey by the Matrix Consulting Group and approved by members of the project steering committee. The survey closed on June 21, 2023, and received a total of 522 responses from 7,213 active email addresses – a response rate of 7.2%.

### 2. Respondent Demographics

While the survey was anonymous, respondents were asked to respond to a variety of statements to allow the project team insight into the demographic makeup of respondents.

What is your role in interacting with the City regarding development, permitting, and inspection activities? (check all that apply)	Number of Respondents	% of Total
Architect	56	7.4%
Builder	98	13.0%
Business Owner	125	16.5%
Contractor for a Specific Trade	84	11.1%
Engineer	18	2.4%
Environmental Consultant	6	0.8%
Homeowner	227	30.0%
Property Developer	75	9.9%
Other	67	8.9%

Some of the most common “Other” responses for this question set included responses such as: real estate investor, land use and planning consultants, surveyors, project managers, and HOA board members.

In what development functions do you primarily interact with the City? (check all that apply)	Number of Respondents	% of Total
Building Plan Check and Permits	437	37.7%
Building Inspections	252	21.8%
Fire Permitting	124	10.7%
Planning & Zoning	204	17.6%
Engineering	109	9.4%
Other	32	2.8%

“Other” responses for this question set revealed respondents that interacted with tree removal permitting process, public works, and environmental reviews. Some “Other” respondents indicated that they interact with the listed departments, but specific review processes within them such as encroachment permits and fire safety reviews.

How frequently do you interact with the City's development, permitting, and inspection functions?	Number of Respondents	% of Total
Several Times Per Month	115	22.0%
Several Times Per Year	150	28.7%
Once or Twice Per Years	92	17.6%
Less Than Once or Twice Per Year	166	31.7%

When was your most recent interaction with the City?	Number of Respondents	% of Total
Within the Last 12 Months	391	74.9%
Over 12 Months Ago	131	25.1%

Responses to this section show that the survey received input from stakeholders with a wide range of backgrounds and frequency of interaction.

More than 50% of respondents indicated that they interact primarily with the Building Plan Check and Permits and Building Inspections functions of the development review process. For the second demographic question, more than 50% of respondents interact with the development review process several times per month or year. Lastly, slightly more than 25% of respondents had not interacted with the department in the preceding 12 months.

These results indicate that the responses reflect a population of residents and professionals that interact frequently with the department in a professional capacity.

3. Multiple Choice Questions

Participants were asked to respond to a series of statements related to the service provided to them during their most recent interaction with the Department. This section was split into five question banks: planning & zoning, building plan check & permitting, building inspection, engineering review & inspection, and the overall development process. Prior to each individual functional areas, respondents were asked if they had interacted with the respective area. If they selected “no” then they did not answer questions related to those functions. Respondents were able to provide their level of agreement for each statement, ranging from “Strongly Disagree” to “Strongly Agree”.

3.1. Planning & Zoning

The first question bank dealt with participant’s most recent interaction with the planning and zoning processes. Because of participants skipping questions, response counts for individual questions vary. On average, 246 responses were received for this question set. The following table shows responses to this section overall:

#	Statement - Planning & Zoning	SA	A	D	SD
1	I clearly understood what planning approvals / permits would be required for my project.	19.4%	55.7%	17.4%	7.5%
2	I clearly understood what information and documentation I needed to include in my application.	19.0%	50.0%	25.4%	5.6%
3	I clearly understood the timeline associated with the review process for my project.	12.8%	27.2%	37.2%	22.8%

4	I clearly understood who had the decision making authority (Zoning Administrator, Planning Commission, City Council) for my application.	16.5%	45.0%	29.3%	9.2%
5	I clearly understood what fees would be required for my project.	15.9%	44.3%	28.5%	11.4%
6	Staff was helpful in explaining what I needed to do and how to accomplish it.	22.0%	48.4%	20.0%	9.6%
7	The City's web site had the information I needed to prepare a complete application.	7.8%	37.9%	42.0%	12.3%
8	The initial review of my application was complete and comprehensive.	11.9%	50.6%	27.6%	9.9%
9	After receiving comments on my application, I clearly understood what I needed to revise on my application to achieve compliance with adopted codes and ordinances.	13.9%	53.9%	21.6%	10.6%
10	The comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	12.2%	49.4%	28.7%	9.7%
11	Staff provided good customer service throughout the process.	22.4%	49.0%	22.0%	6.5%
12	The time it took to process my application was appropriate.	11.0%	23.6%	27.6%	37.8%

Responses to this section were generally positive. Taking the average of responses indicates an agreement rate of 60% and disagreement rate of 40%. Questions #3, #7, and #12 deviated from the average and had disagreement rates of 60%, 54.3%, and 65.4%, respectively.

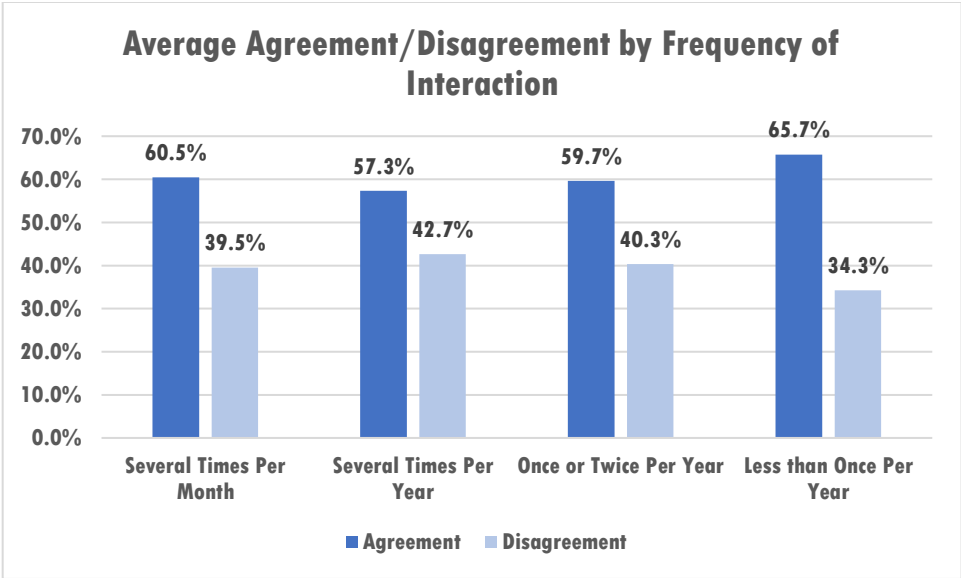
These exceptions indicate that some areas of improvement for Planning & Zoning processes lie in the communication of application timelines, information made available through the City’s web site, and the length of time required to process an application. The trend related to timeline communication and application processing times will continue to appear through several sections of the survey.

3.1.1. Demographic Insights – Frequency of Interaction

Using demographic data gathered at the beginning of the survey allowed the project team to develop insight into key differences between various respondent groups. The following narrative summarizes some key differences between each respondent group (homeowners, contractors, business owners, etc.).

With respect to the “Frequency of Interaction” demographic cross-section, responses from all categories were closely aligned. Average responses ranged between 57.3% to 65.7% agreement, with those interacting with the department less than once per year having the highest average agreement rate.

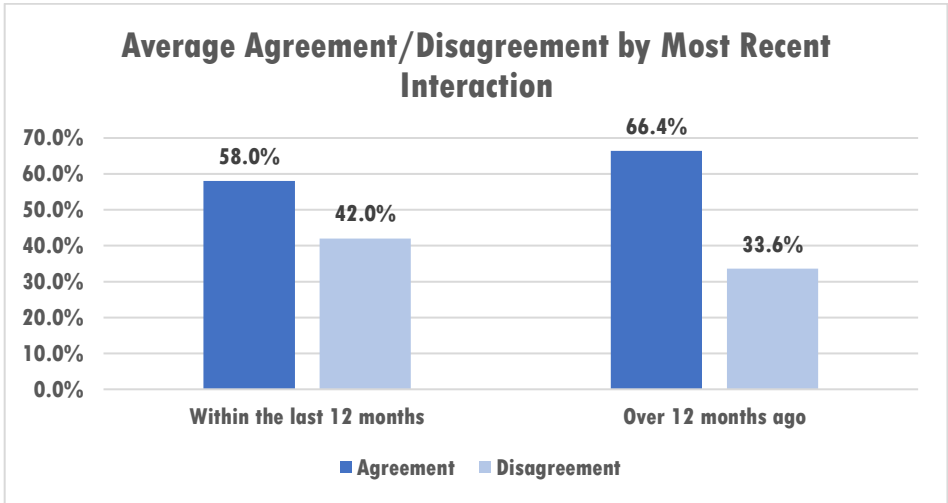
The chart below shows average agreement/disagreement across all statements based on how often each respondent interacted with the process:



This chart shows that agreement was more common than disagreement across all respondents. It should be noted that those who interacted once or twice per year or less than once per year were an average of 18.3% more likely to skip the question.

3.1.2. Demographic Insights – Most Recent Interaction

This demographic set relates to whether or not the respondent has interacted with the development review process in the previous 12 months. The following chart depicts agreement and disagreement rates by most recent interaction:

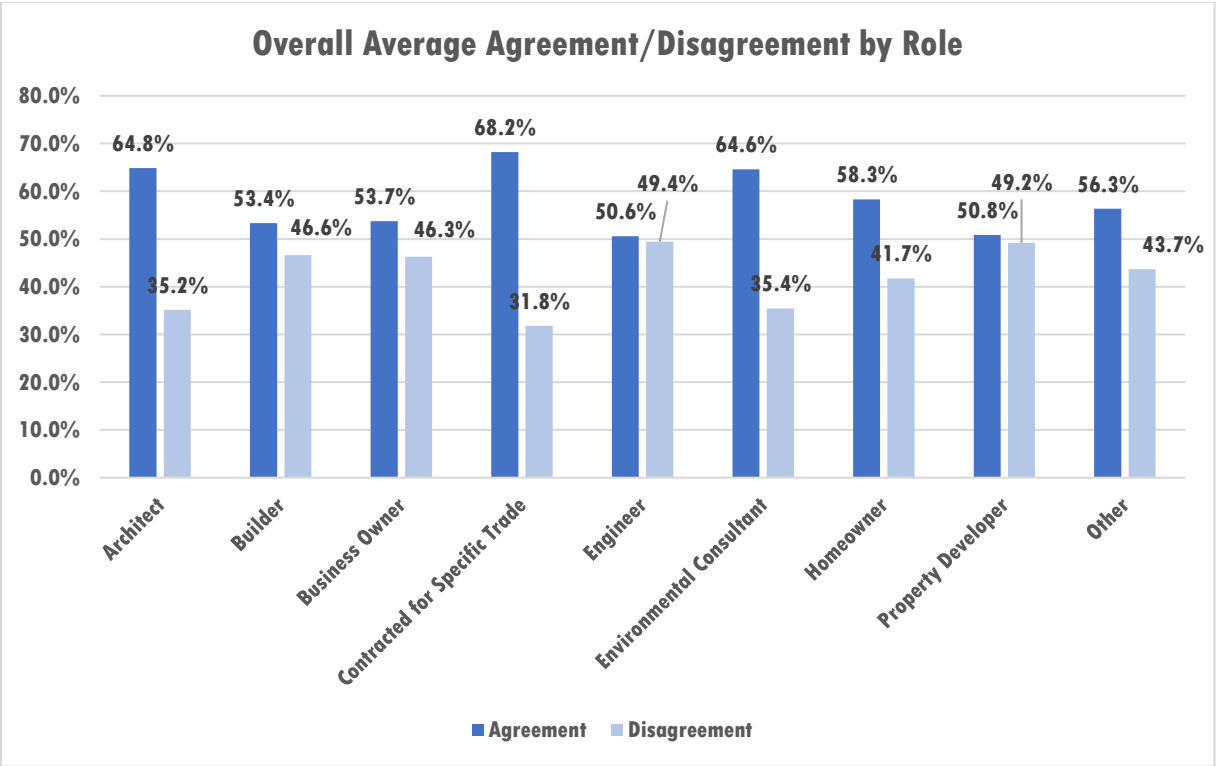


While responses were generally positive among both categories, respondents that last interacted with the process more than 12 months prior agreed at an average rate higher than those who interacted in the last 12 months.

3.1.3. Demographic Insights – Role

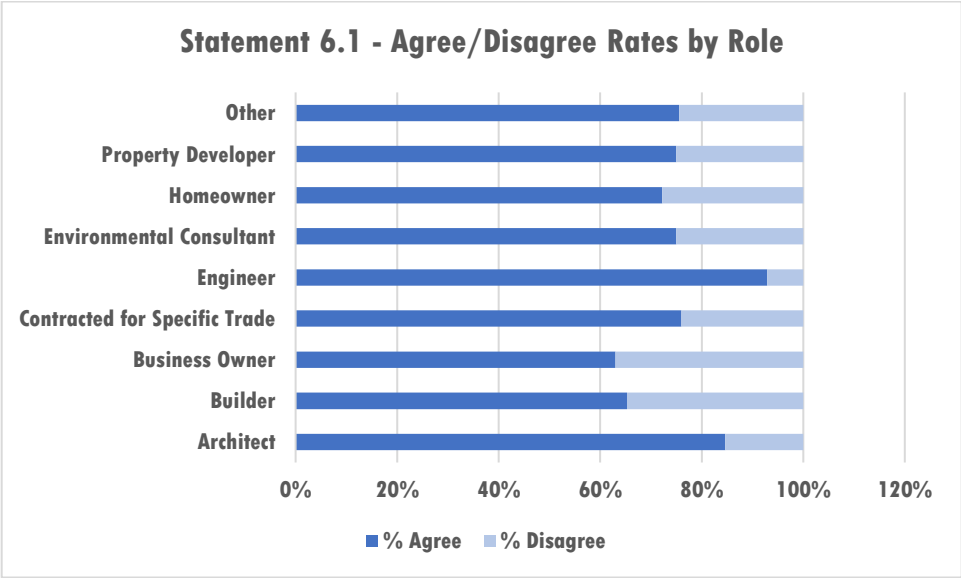
This demographic relates to the professional role or interacting capacity that the respondent identifies with. Respondents were given the option of, architect, builder, business owner, contractor for a specific trade, engineer, environmental consultant, homeowner, property developer, or other.

The following graph depicts agreement and disagreement rates by demographic:

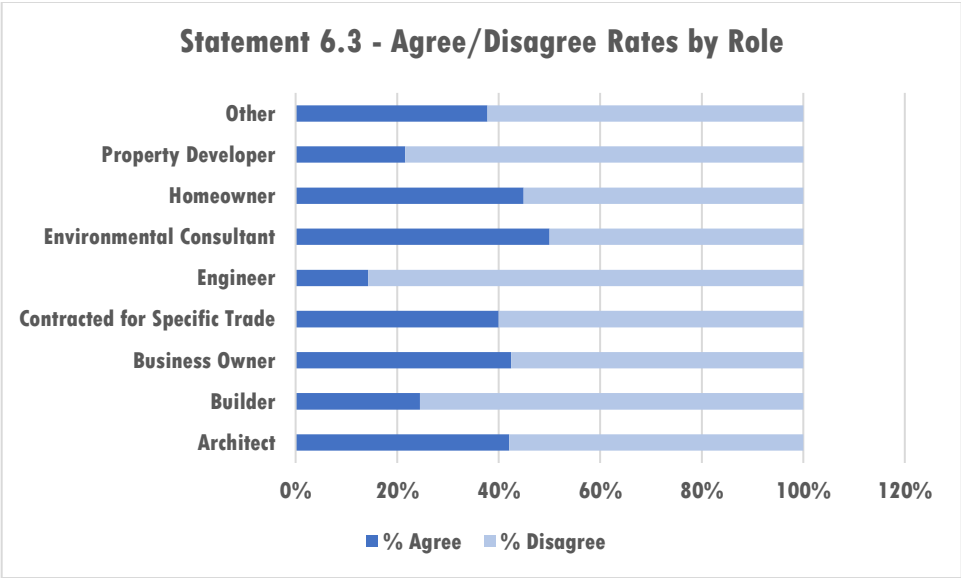


The graph indicates that architects, contractors, and environmental consultants all agreed with the statement prompts more than the other demographics. Several demographics are much more divided, with only 50.6% of engineers agreeing.

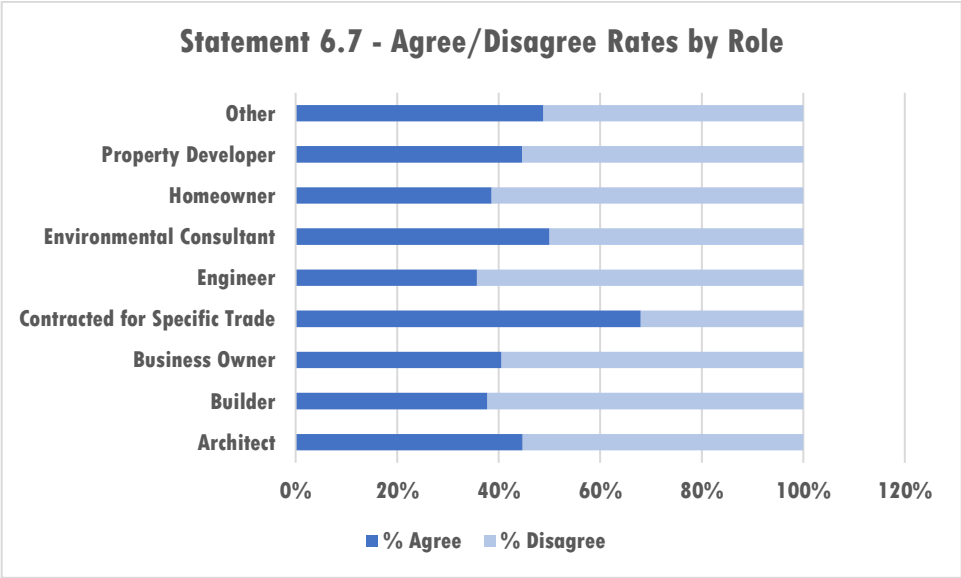
Responses between role demographics varied significantly from question to question. The following graphs depict specific questions where this variation was noted as particularly significant:



Statement 6.1 - “I clearly understood what planning approvals / permits would be required for my project.” - had significantly higher rates of agreement among engineers and architects than any of the other roles. Business owners and builders had some of the lowest rates of agreement for this question. This could indicate that communication of required approvals and permitting can be improved for applicants that do not have backgrounds that have given them exposure to permitting processes.

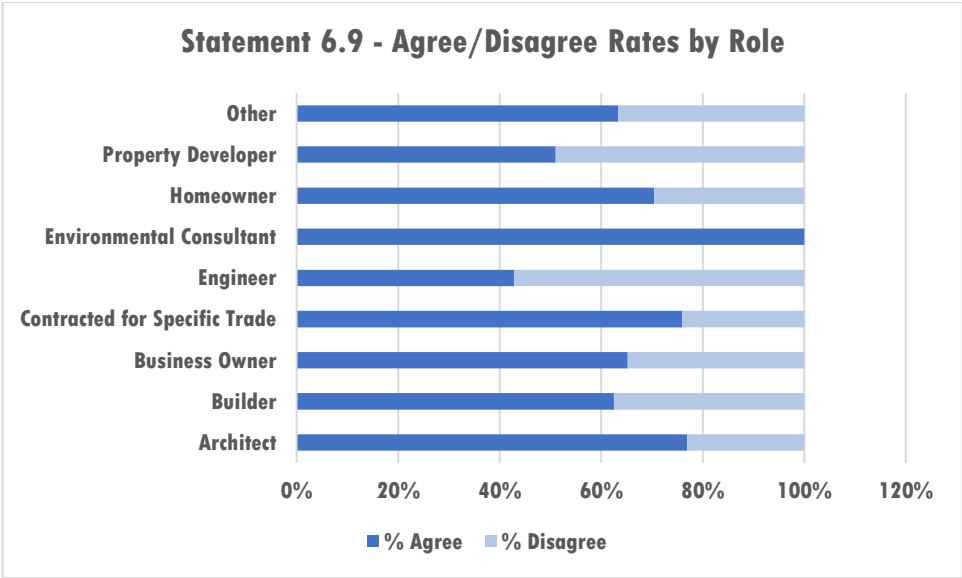


Statement 6.3 – “I clearly understood the timeline associated with the review process for my project” – had some of the lowest agreement rates among engineers, property developers, and builders. This could indicate that there is a significant disconnect between expectations and the reality of permitting timelines, especially among applicants coming from these backgrounds.

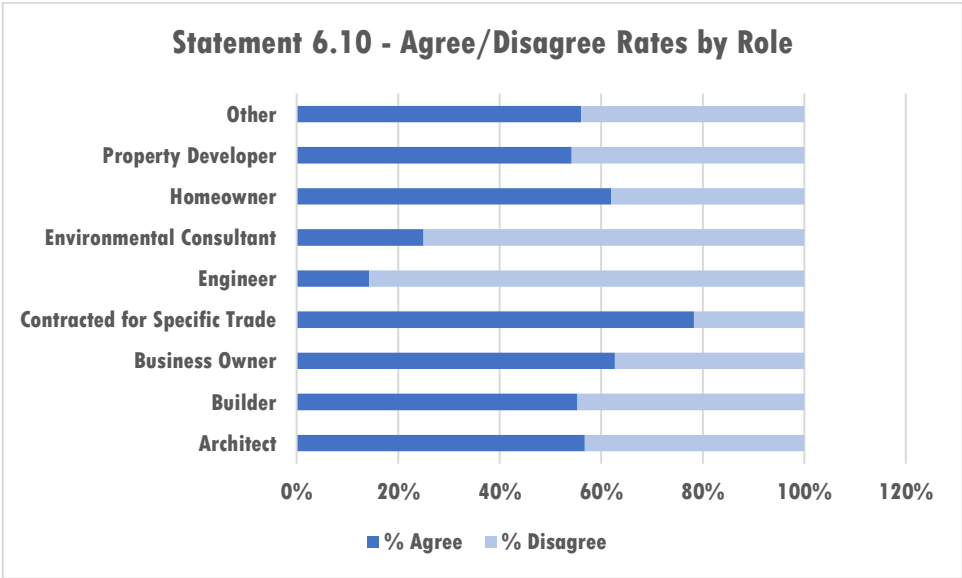


Statement 6.7 – “The City’s web site had the information I needed to prepare a complete application” – had the highest rate of agreement among contractors and environmental consultants. This could indicate that applicants from these backgrounds have an easier time navigating the City’s website and locating important information. Further investigation into what expectations and needs applicants have of the city’s website could reveal more ways in which the site can be improved for applicants of all backgrounds.





Statement 6.9 – “After receiving comments on my application, I clearly understood what I needed to revise on my application to achieve compliance with adopted codes and ordinances” – had the lowest rate of agreement among engineers and property developers. This could indicate that feedback being provided to applicants of these backgrounds lacks clarity or actionability. Interestingly, residents who identified as homeowners had some of the highest rates of agreement for this statement. This disparity could indicate that current feedback is acceptable for less technical permits that homeowners encounter, but not more complicated permits that engineers or property developers may be involved in.



Statement 6.10 – “The comments received outlining deficiencies were appropriately aligned with ensuring code compliance” – had the lowest rate of agreement among engineers and environmental consultants. These disagreement rates indicate that applicants from these backgrounds do not find the comments to accurately align with code compliance goals – an issue that could be addressed through improved feedback communication or code citation. It should be noted that only 4 environmental consultants responded to this question.

3.2. Building Plan Check & Permitting

The next set of questions focused on the building plan check and permitting operations. On average, 285 responses were received for this question set. The following table shows responses to this section overall:

#	Statement - Building Plan Check & Permitting	SA	A	D	SD
1	I clearly understood what building approvals / permits would be required for my project.	27.3%	48.8%	17.4%	6.5%
2	I clearly understood what information and documentation I needed to include in my application.	21.4%	52.2%	20.3%	6.1%
3	I clearly understood the timeline associated with the review and approval process for my project.	12.4%	36.4%	33.0%	18.2%
4	I clearly understood the steps of the review process for my project.	15.9%	49.3%	25.9%	9.0%
5	I clearly understood what fees would be required for my project.	16.7%	48.6%	27.1%	7.6%
6	The City's web site had the information I needed to prepare a complete building application.	7.6%	49.3%	30.2%	12.9%
7	The initial review of my building application was complete and comprehensive.	16.1%	54.7%	20.4%	8.8%
8	After receiving comments on my application, I clearly understood what I needed to revise on my application to achieve compliance with adopted codes and ordinances.	15.1%	57.6%	19.4%	7.9%
9	The comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	15.1%	54.2%	22.9%	7.7%
10	Staff was helpful in explaining what I needed to do and how to accomplish it.	25.2%	49.6%	19.5%	5.7%
11	Staff provided good customer service throughout the process.	29.5%	46.7%	17.2%	6.7%
12	The time it took to process my building permit application was appropriate.	15.1%	32.4%	25.0%	27.5%

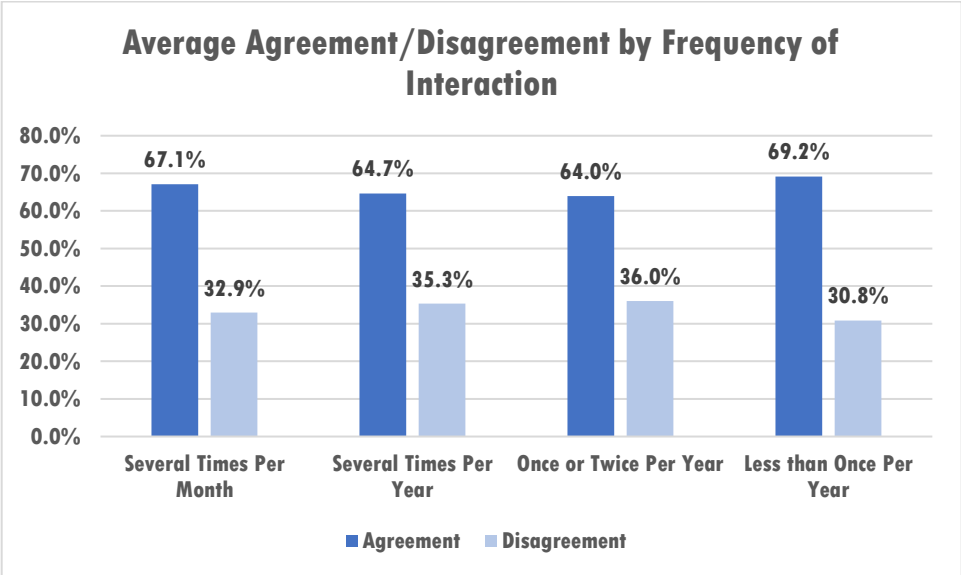
Responses to this section were the some of the most positive of the multiple choice question sets. Taking an average of all responses shows an overall agreement at 66.4% and disagreement at 33.6%.

Two exceptions to this trend are questions #3 and #12 which had a disagreement rate of 51.2% and 52.5%, respectively. This indicates that respondents were more likely to take issue with the communication of review timelines and permit processing times as a whole.

3.2.1 Demographic Insights - Interaction Frequency

Similar to the Planning & Zoning demographic cross-section, responses from all ranges of interaction frequency were closely aligned. Average responses ranged between 64.0% to 69.2% agreement, with those interacting with the department less than once per year having the highest average agreement rate.

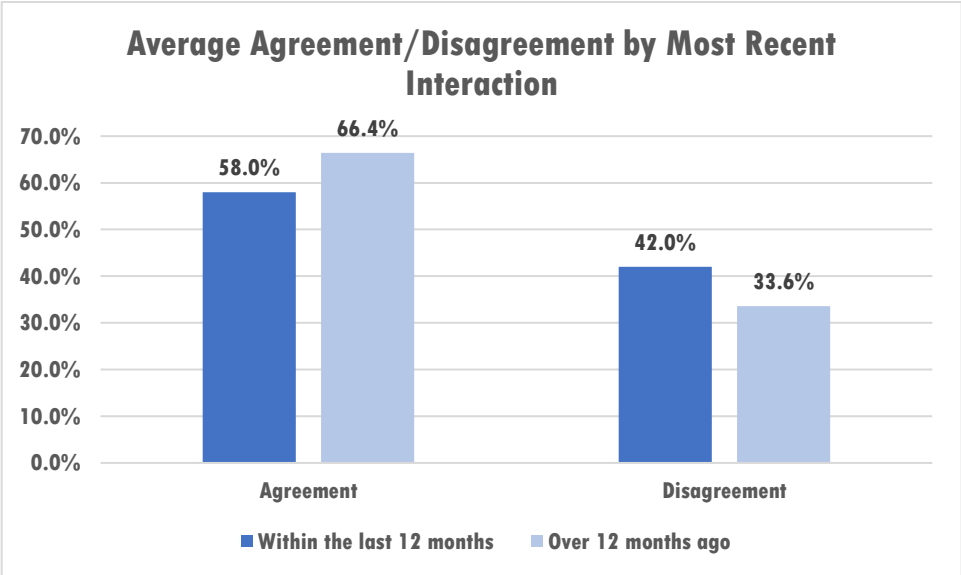
The chart below shows average agreement/disagreement across all statements based on how often each respondent interacted with the process:



This chart shows that agreement was more common than disagreement across all respondents. It should be noted that those who interacted once or twice per year or less than once per year were an average of 13.9% more likely to skip the question.

3.2.2 Demographic Insights – Most Recent Interaction

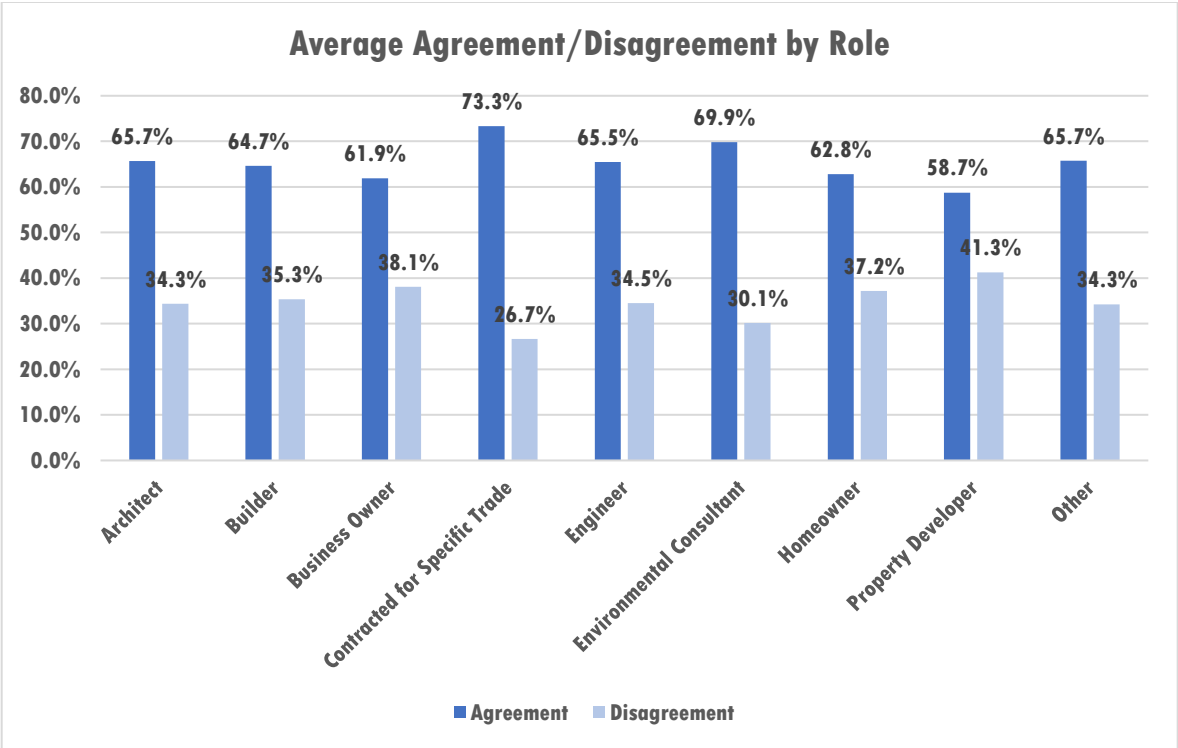
Respondents, when viewed from this cross section, were similar in how they agreed and disagreed with the prompts. The follow graph depicts average agreement and disagreement rates by most recent interaction:



As the graph indicates, those who interacted in the last 12 months were somewhat more likely to disagree at 42.0% compared to 33.6% for those who interacted over 12 months ago. Skip rates were similar between both demographic categories at 45.1% those who interacted more recently and 41.6% for those who interacted more than a year prior.

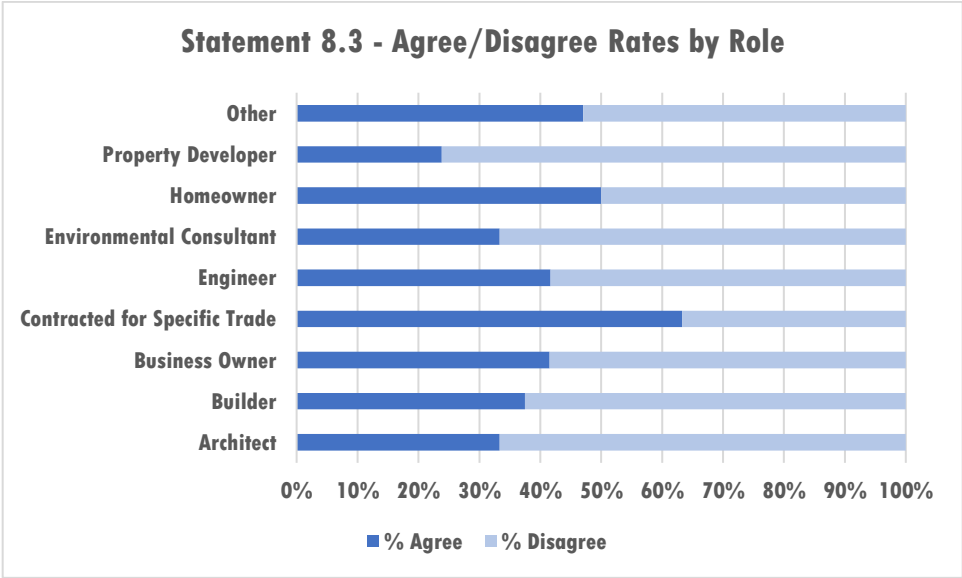
3.2.2 Demographic Insights – Role

With respect to the “Role” cross section, respondents were generally positive across all backgrounds. The following graph depicts average agreement and disagreement rates by respondent’s role:

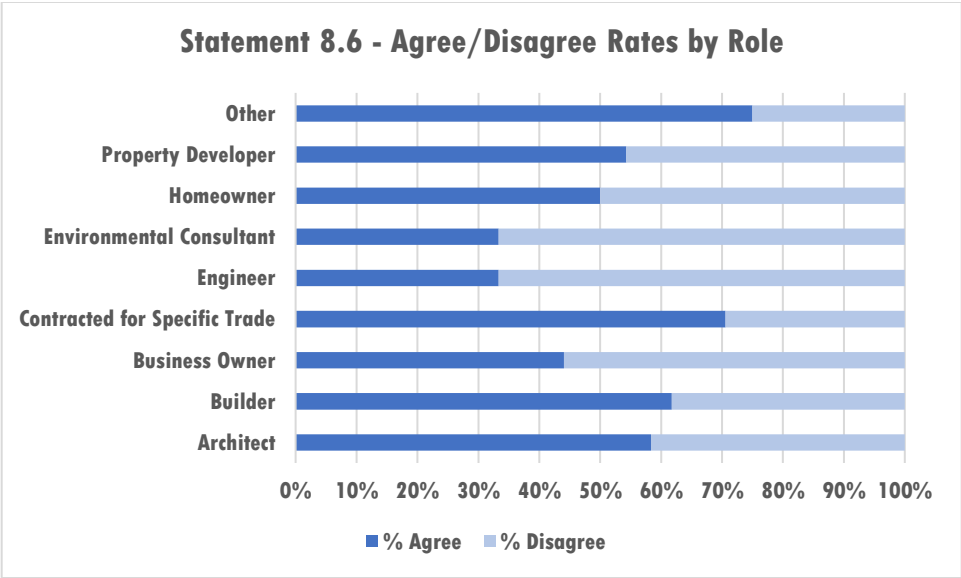


Demographic groups ranged in agreement from 58.7% for property developers and 73.3% for contractors. This indicates that building plan check processes could be improved with respect to property developer’s concerns. Skip rates among the demographic categories was an average of 41.6% of total respondents.

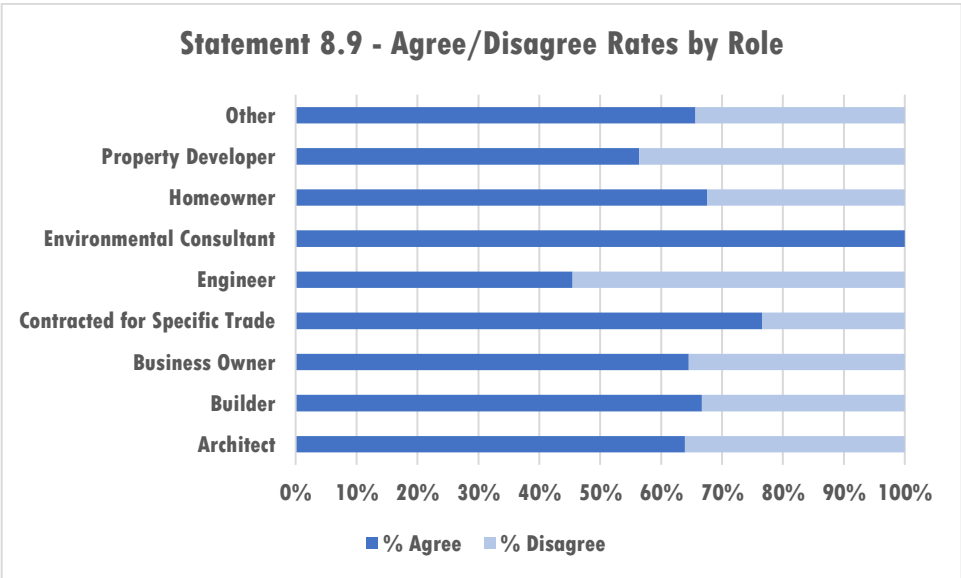
The following tables identify statements that had significant variation in rates of agreement or disagreement between roles:



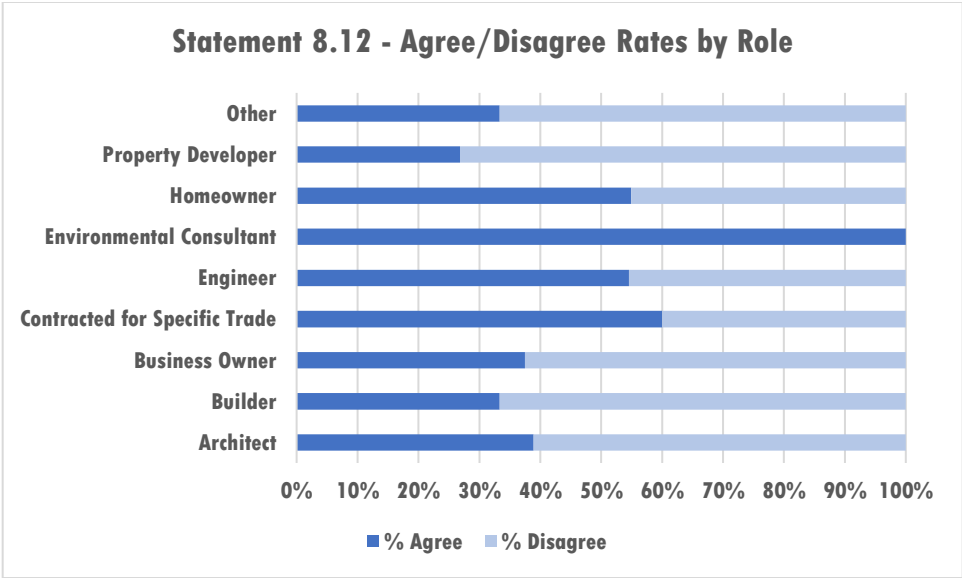
Statement 8.3 – “I clearly understood the timeline associated with the review and approval process for my project” – had the highest rate of agreement among contractors and homeowners and the lowest among property developers. This could indicate that realistic timelines are provided for permits most commonly applied to by homeowners and contractors, but not property developers or other backgrounds with low rates of agreement.



Statement 8.6 – “The City’s web site had the information I needed to prepare a complete building application” – had the lowest rate of agreement among environmental consultants, engineers, and business owners. This statement also had high rates of agreement among contractors and “other”. The large gap in sentiment between roles could be the result of engineers and environmental consultants applying for permits or reviews which require information that is not readily accessible on the City’s website. This could be improved by considering which permits are most applied for by these demographics, and determining if the information present on the City’s website is sufficient for someone wanting to apply for a related permit.



Statement 8.9 – “The comments received outlining deficiencies were appropriately aligned with ensuring code compliance” – had high rates of agreement among most backgrounds with the exception of engineers and, to a lesser extent, property developers. This is similar to statement 6.9 from the Planning & Zoning subsection, which also had a high rate of disagreement among engineers. This consistently low agreement rate among engineers with respect to feedback from reviewers could indicate that project requirements and code citations are either unclear or are not being communicated in a manner that is completely understood by applicants from those backgrounds.



Statement 8.12 – “The time it took to process my building permit application was appropriate” – varied significantly in rates of agreement between respondent’s backgrounds. Property developers, builders, business owners, and architects all had low rates of agreement on this statement. This could either indicate that permits being applied for by those that agreed are simpler, thereby taking less time and being viewed more positively, or it could indicate that there is a disconnect between expectations of review times and the reality of them. This could be improved through better communication of expected wait times for applicants, or by reducing permit processing times.

3.3. Building Inspection Process

The next set of questions focused on the building inspection process. On average, 232 responses were received for this question set. The following table shows responses to this section overall:

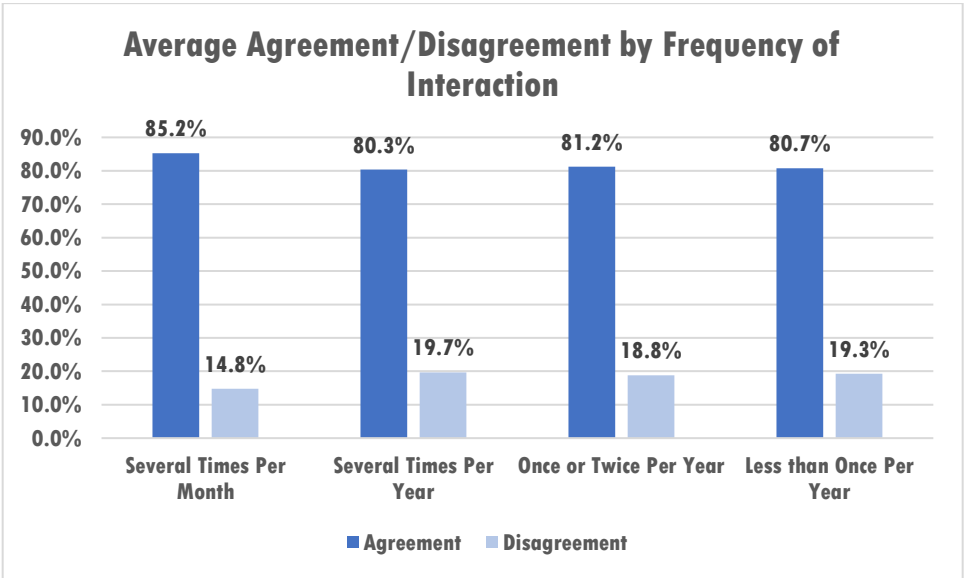
#	Statement - Building Inspection Process	SA	A	D	SD
1	The City did a good job at communicating what building inspections were required.	16.6%	63.1%	14.9%	5.4%
2	It was easy to request and schedule a building inspection.	19.1%	61.0%	14.1%	5.8%
3	Inspectors dealt with me using a positive approach of "here's how to get your work approved".	25.5%	58.3%	12.3%	3.8%
4	If deficiencies were identified during an inspection, inspectors indicated the applicable code section.	15.7%	62.2%	17.1%	5.1%
5	The inspector showed up when expected.	26.1%	59.3%	11.6%	2.9%
6	Inspectors were fair and consistent in applying the codes and regulations to my project.	26.3%	57.6%	13.1%	3.0%
7	The process to obtain the certificate of occupancy for my permit was efficient.	18.0%	61.2%	14.1%	6.8%
8	Staff was helpful in explaining what I needed to do and how to accomplish it.	23.4%	57.6%	13.9%	5.2%
9	Staff provided good customer service throughout the process.	27.1%	57.2%	11.0%	4.7%

Responses to this question set were more positive than any other asked in the survey. On average, 81.7% of responses were that of agreement compared to only 18.3% disagreement. The only question that somewhat deviates from this trend is #4 with 22.2% disagreement. This outlier indicates that citation of applicable code sections could be an area for improvement within the building inspection process.

3.3.1. Demographic Insights – Interaction Frequency

Similar to previous demographic cross-sections, responses from all ranges of interaction frequency were closely aligned. Average responses ranged between 80.3% to 85.2% agreement, with those interacting with the department several times per month having the highest average agreement rate.

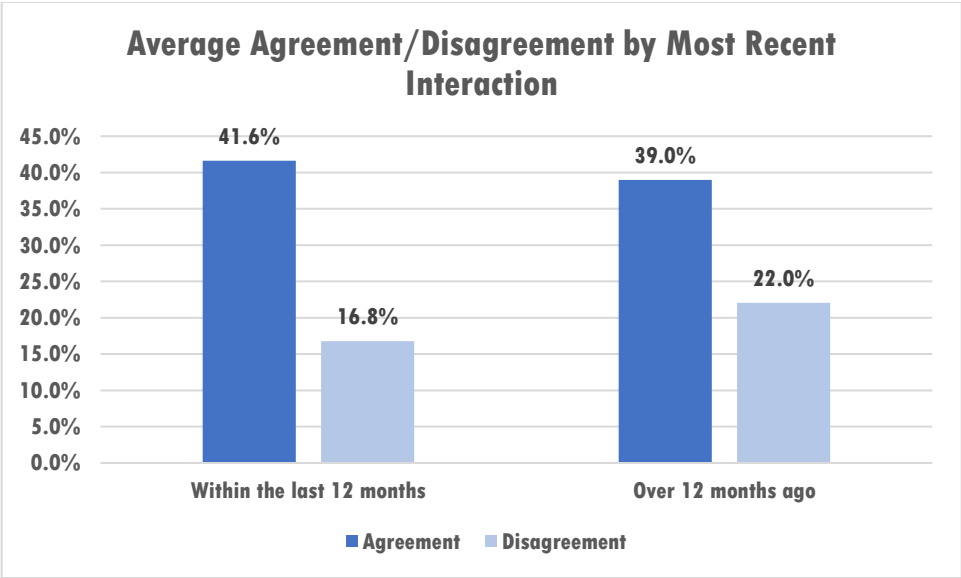
The chart below shows average agreement/disagreement across all statements based on how often each respondent interacted with the process:



3.3.2. Demographic Insights – Most Recent Interaction

With respect to viewing the building inspection process from the lens of most recent interaction, both demographics viewed the process mostly favorably. Those who responded in the last 12 months and more than a year ago agreed significantly more than disagreed, on average.

The following graph depicts agreement and disagreement rates by most recent interaction:

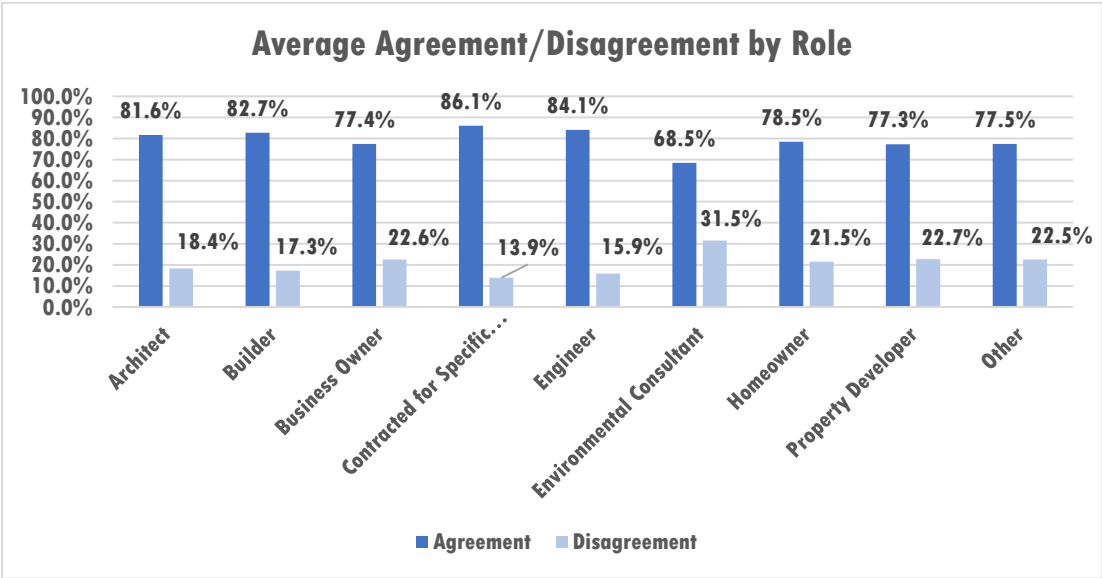


This graph indicates that those who last interacted more than a year were somewhat more likely to disagree with the prompt statements. With respect to skip rates, the subject demographics had an average skip rate of 51.7%

3.3.3. Demographic Insights – Role

From the professional identity standpoint, all demographic groups viewed the process favorably. On average, respondents agreed at 79.3%.

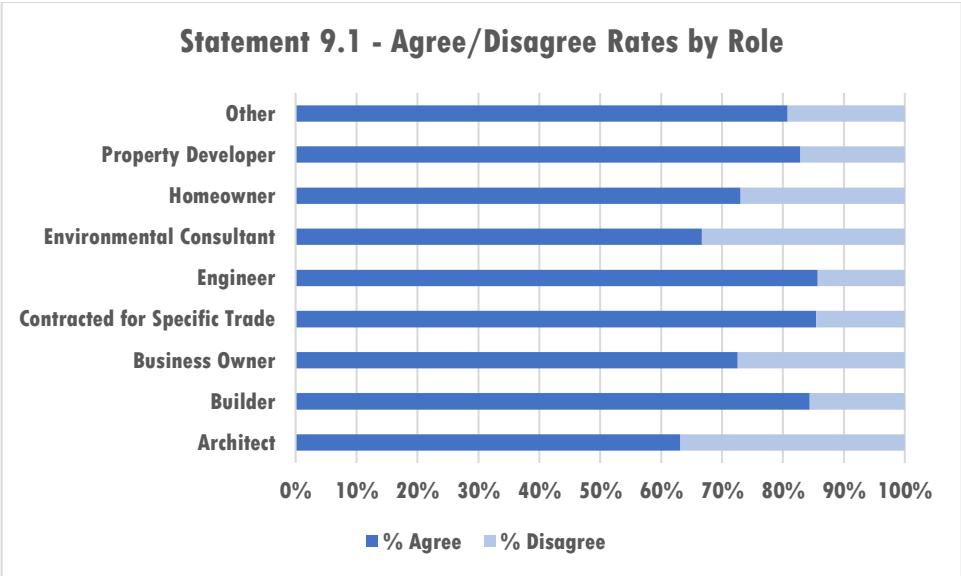
The following graph depicts agreement and disagreement rates by respondent’s role:



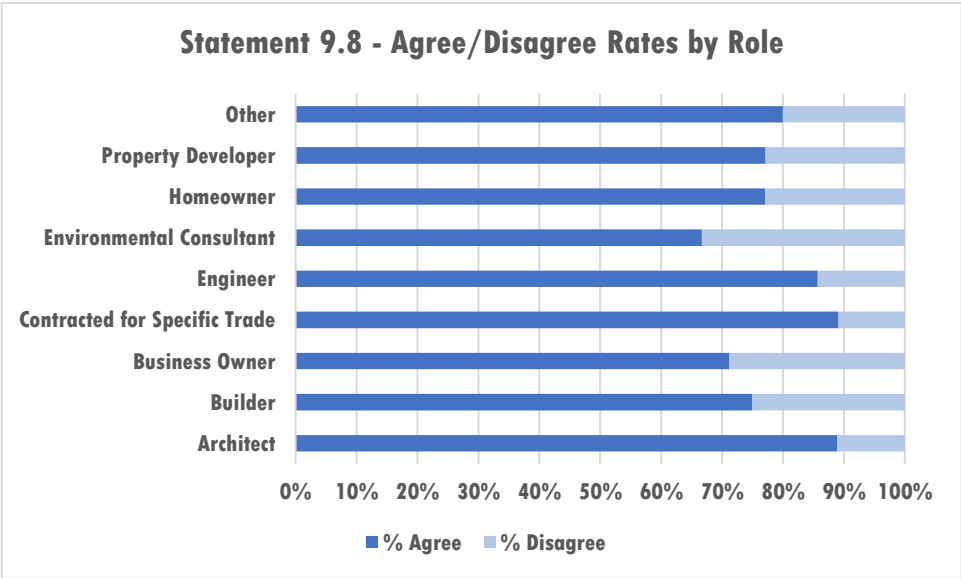
It can be seen from the graph that all responding demographics agreed more than disagreed, with a range of 68.5% for Environmental Consultants (note: smaller sample size) to 86.1% for contractors. Skip rates ranged from 33.2% for builders to 68.7% for architects with an average skip rate of 52.7%.

The following graphs represent average percent agreement and disagreement rates by roles for statements which showed significant variation between respondent’s roles:



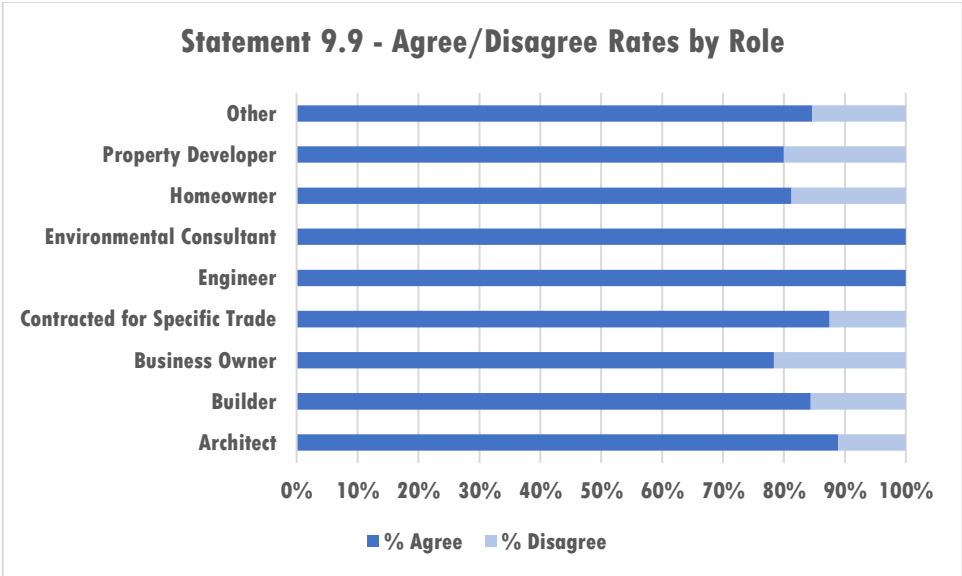


Statement 9.1 – “The City did a good job at communicating what building inspections were required” – had lowest rates of agreement among architects, and environmental consultants. This could indicate that communication of what building inspections are required could be improved for these demographics.



Statement 9.8 – “Staff was helpful in explaining what I needed to do and how to accomplish it” had lower rates of agreement among environmental consultants, business owners, and builders. While rates of agreement remained high across all demographics in aggregate, this lower agreement rate among specific demographics could mean that current communication of what to do can be improved for non-specialists.

It should be noted that homeowners, a demographic which would generally not be considered a specialist with respect to the inspection processes, had a higher rate of agreement than the aforementioned roles. This could indicate that process explanations could be better tailored for individuals of backgrounds that are more familiar with the development process than homeowners but are not as familiar as professionals such as architects or property developers.



Statement 9.9 – “Staff provided good customer service throughout the process”. This statement is unique in that the two demographics that had the lowest rate of agreement overall – environmental consultants and property developers – had high rates of agreement on this specific prompt. This indicates that customer service is one of the greatest strengths of the building inspection process.

3.4. Engineering Review & Inspection Process

The next question set relates to the engineering review and inspection process. On average, 105 responses were received for this question set. The following table shows responses to this section overall:

#	Statement - Engineering Review & Inspection Process	SA	A	D	SD
1	I clearly understood what Engineering approvals / permits would be required for my project.	10.9%	50.9%	28.2%	10.0%
2	I clearly understood what information and documentation I needed to include in my application.	9.2%	53.2%	32.1%	5.5%
3	I clearly understood the timeline associated with the review and approval process for my project.	8.2%	30.9%	37.3%	23.6%
4	I clearly understood the steps of the review process for my project.	8.2%	47.3%	34.5%	10.0%
5	I clearly understood what fees would be required for my project.	10.2%	46.3%	34.3%	9.3%
6	The City's web site had the information I needed to prepare a complete application.	5.6%	45.4%	37.0%	12.0%
7	The initial review of my Engineering application was complete and comprehensive.	11.3%	45.3%	34.0%	9.4%
8	After receiving comments on my application, I clearly understood what I needed to revise on my application to achieve compliance with adopted codes and ordinances.	10.7%	54.4%	24.3%	10.7%

#	Statement - Engineering Review & Inspection Process	SA	A	D	SD
9	Comments received outlining deficiencies were appropriately aligned with ensuring code compliance.	11.0%	48.0%	24.0%	17.0%
10	Staff was helpful in explaining what I needed to do and how to accomplish it.	16.7%	50.0%	24.5%	8.8%
11	Staff provided good customer service throughout the process.	20.4%	44.4%	24.1%	11.1%
12	I clearly understood what Engineering/Transportation inspections were required for my project.	11.3%	52.6%	29.9%	6.2%
13	I clearly understood how to schedule an Engineering/Transportation inspection.	9.5%	64.2%	20.0%	6.3%
14	The time it took to process my Engineering application was appropriate.	7.6%	28.6%	33.3%	30.5%

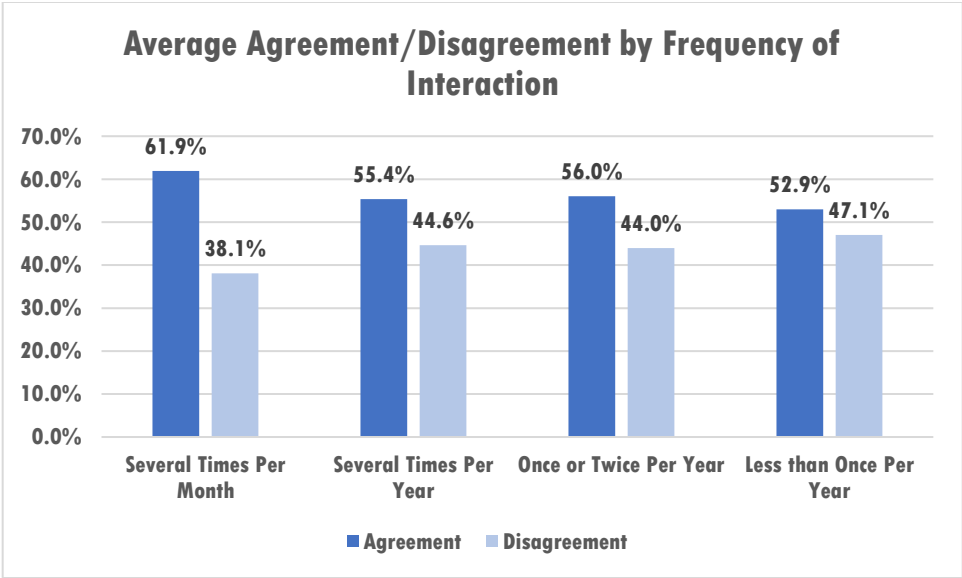
Responses to this section were slightly positive on the whole, but several questions had high rates of disagreement. Taking an average of all responses shows overall agreement at 56.6% and disagreement at 43.4%.

Six questions (#3, #6, #8, #9, #11, and #14) had higher rates of disagreement than the rest. This indicates that areas for potential improvement for the engineering inspection and review processes could include communication of timelines, improvements to information accessible from the internet, clarity of review comments, and application review times.

3.4.1 Demographic Insights – Frequency of Interaction

As with previous frequency of interaction cross sections, responses between interaction frequency groups was relatively closely aligned. As frequency of interaction decreased, so too did agreement rates. Average agreement rates between groups ranged from 52.9% to 61.9%.

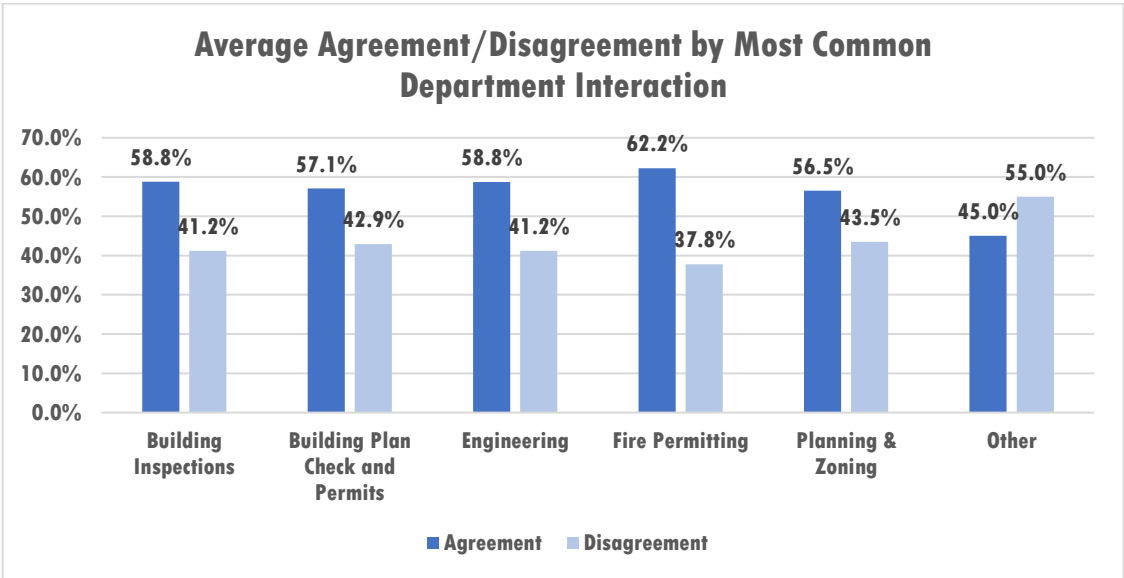
The chart below shows average agreement/disagreement across all statements based on how often each respondent interacted with the process:



This chart shows that responses were much more closely split between agreement and disagreement than preceding question sets. The disagreement rate tended to be higher for those individuals who interacted less frequently.

3.4.2 Demographic Insights – Department Interaction

Respondents across all primary department contacts indicated similar rates of agreement and disagreement. The only demographic that disagreed more than agreed was the “Other” category at 55% disagree and 45% agree. The following graph depicts agreement and disagreement rates for engineering review and inspection prompts:



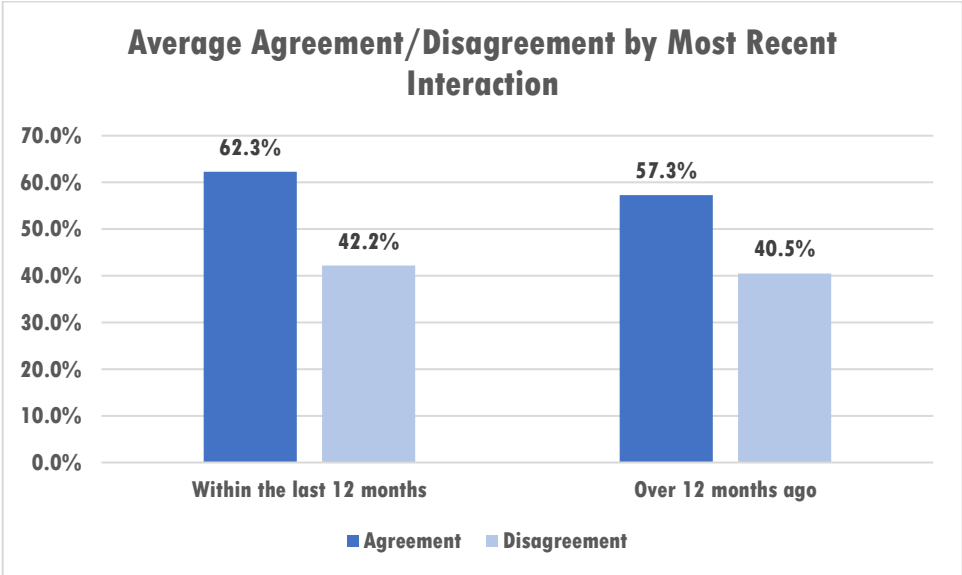
Given the Engineering review is incorporated into other planning and building processes, this demographic cross-section is useful in providing insight into how respondents that interact with other departments perceive the engineering processes. Excluding the “Other” category, agreement rates ranged from 45.0% for those who interact with “Other” functions most to 62.2% for those who interact with fire permitting functions the most.

Those who interact most with fire permitting and engineering have some of the lowest disagreement rates while those who interact with planning and zoning, building plan checks and permits, and “other” have the highest rates of disagreement.

3.4.3 Demographic Insights – Most Recent Interaction

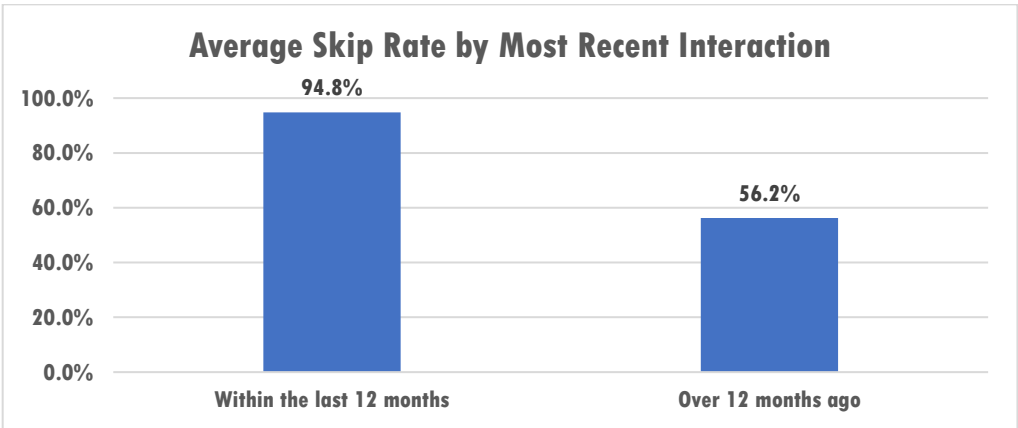
The “Most Recent Interaction” demographic cross section indicates similar rates of agreement and disagreement between categories. On average, 59.8% of respondents agreed with the statements.

The following graph shows agreement and disagreement rates by most recent interaction:



On the whole, respondents appear to agree with more statements than disagree, with those interacted in the last 12 months being slightly more likely to agree than those who did not. It should be noted that the “Within the last 12 months” category had a very high skip rate for this prompt set at 94.8%.

The following graph depicts skip rates by most recent interaction:

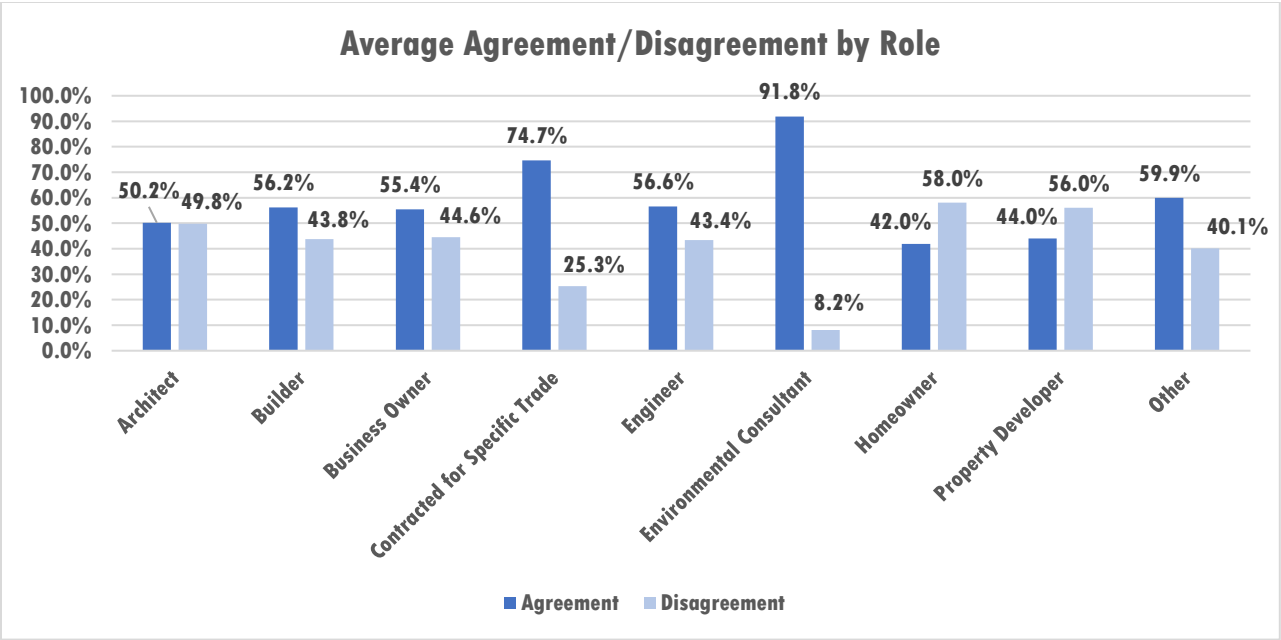


This very high skip rate among those who interacted in the last 12 months significantly hinders its ability to be generalized to the broader population of DSD clients interacting in the previous 12 months.

3.4.4 Demographic Insights – Role

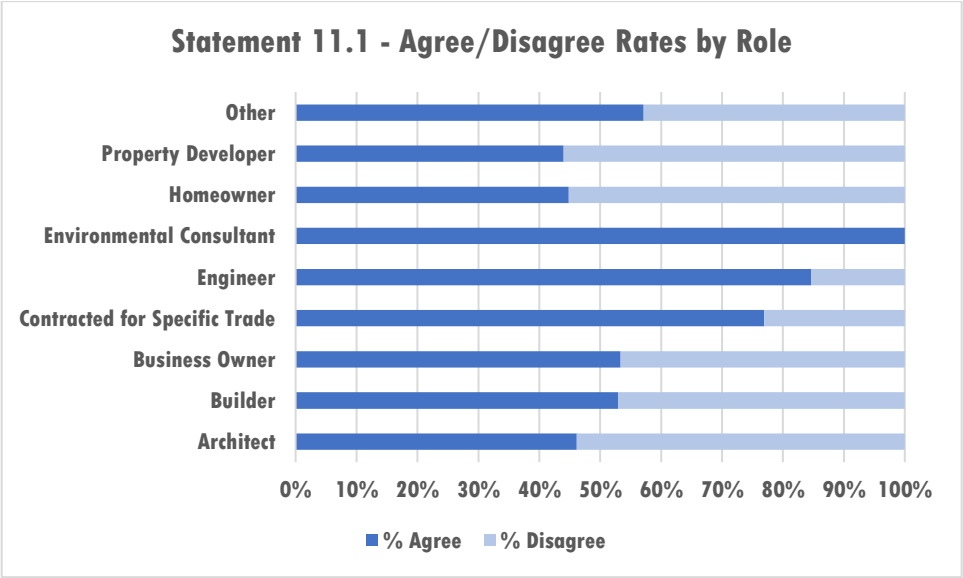
When viewing the engineering review and inspection process results from the lens of respondent’s roles, agreement rates range widely between demographics. Results range from an agreement rate of 91.8% for environmental consultants to 42% for homeowners. This wide range of responses could indicate that current policies and processes are more accessible to applicants of specific backgrounds, potentially being an area for improvement.

The following graph depicts average agreement and disagreement rates by role:



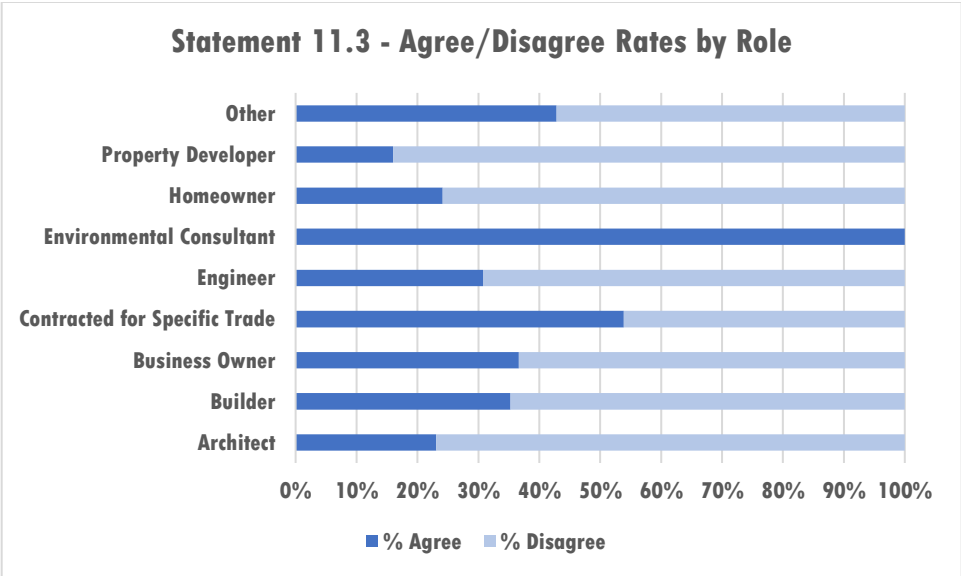
Much like agreement and disagreement rates, average skip rates also varied widely between demographics. Skip rates ranged from 28.2% for engineers to 88.2% for homeowners with an average skip rate of 67.7%.

The following graphs depict average agreement and disagreement rates by role for specific questions which contained significant differences between roles:

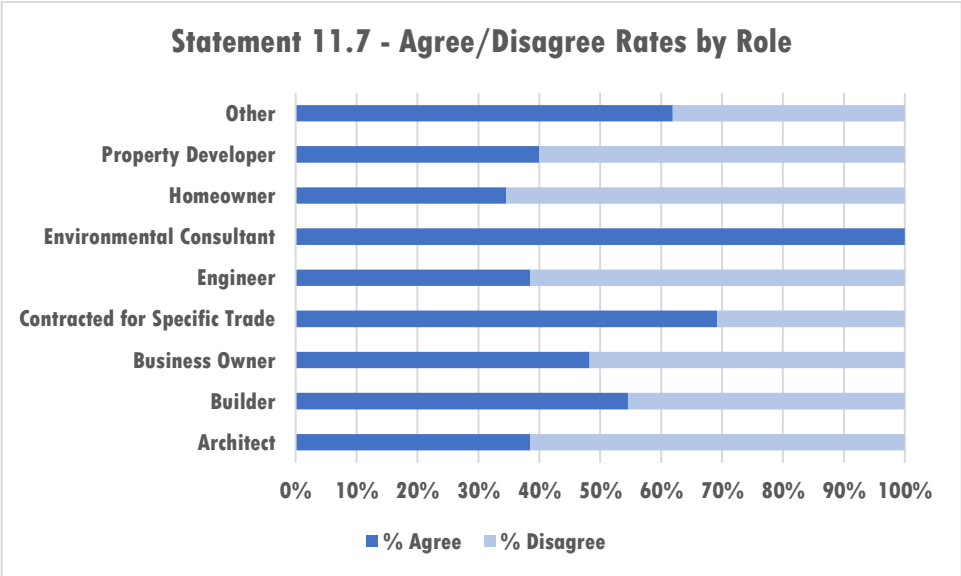


Statement 11.1 – “I clearly understood what Engineering approvals / permits would be required for my project” – had high rates of agreement among environmental consultants, engineers, and contractors, but low rates of agreement among the other demographics. This could mean that communication of what engineering approvals and permits could be better communicated to applicants who come from backgrounds with less familiarity with the development review process. It should be noted that the number of environmental consultants responding to these prompts was less than five, so the results may be impacted by the small sample size.

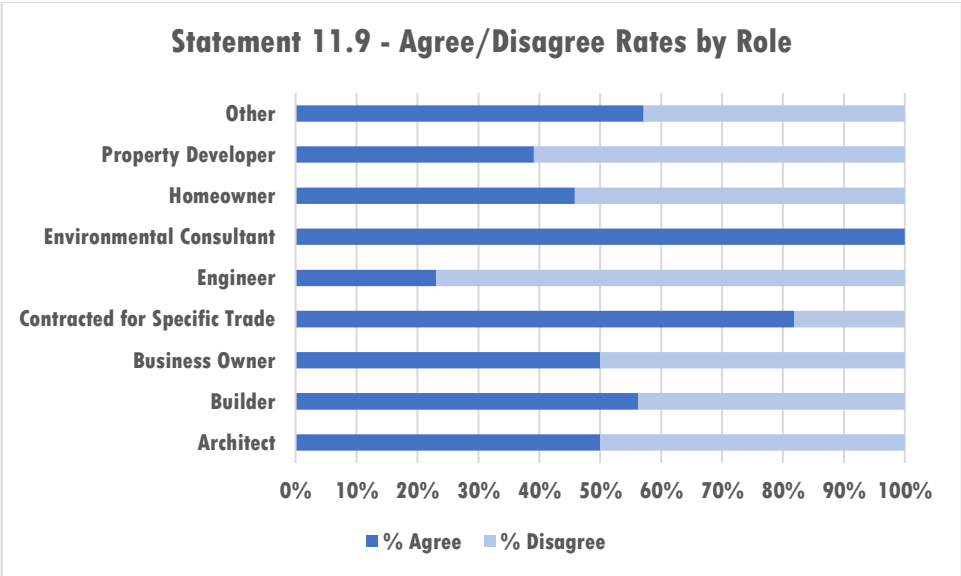
This trend is replicated in statement 11.2 – “I clearly understood what information and documentation I needed to include in my application” – where environmental consultants, engineers, and contractors all had higher rates of agreement compared to other demographics.



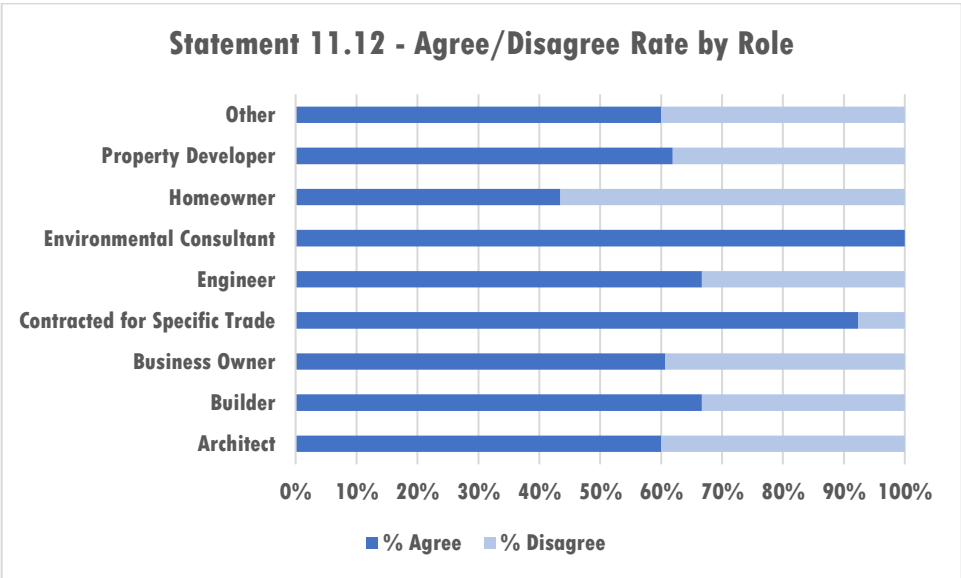
Statement 11.3 – “I clearly understood the timeline associated with the review and approval process for my project” – had low rates of agreement among all demographics besides contractors and environmental consultants. While this could be the result of long permit processing times regardless of the communication of timelines, it could also be an area for improvement in communicating expected timelines to both specialists and non-specialists. Given the lowest rate of agreement was among property developers, architects, and homeowners, it is clear that familiarity with the development review process is not the only factor affecting respondent’s perception of the approval process timelines. It should also be noted that only three environmental consultants responded to this statement.



Statement 11.7 – “The initial review of my Engineering application was complete and comprehensive” – had high rates of agreement among environmental consultants, contractors, and those who reported as “other”. Lower rates of agreement among other demographics could indicate that the iterative nature of engineering reviews is not being clearly communicated to applicants, or that the engineering reviews themselves could be more comprehensive early on.

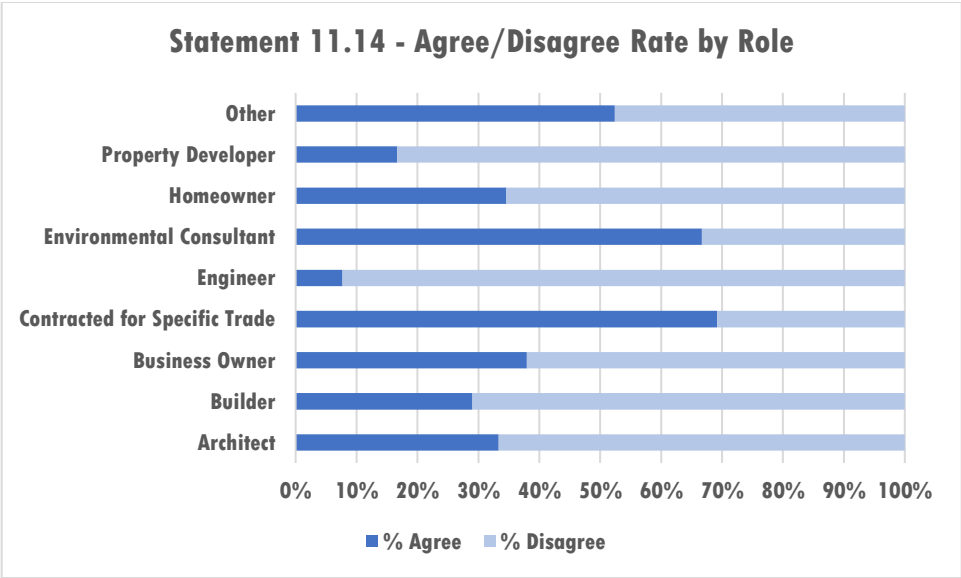


Statement 11.9 – “Comments received outlining deficiencies were appropriately aligned with ensuring code compliance” – had relatively high rates of agreement among most demographics besides engineers and property developers. Similar to previous statement responses in prior categories, this could indicate that engineers specifically are unconvinced or otherwise dissatisfied with the alignment between written code and code compliance intent. Interviews with engineers or other applicants that are dissatisfied with this statement could reveal other reasons why this trend reoccurs.



Statement 11.12 – “I clearly understood what Engineering/Transportation inspections were required for my project” – had lowest rates of agreement among homeowners. This could be the result of communication of these inspection requirements not being effectively tailored for a lay audience that is not familiar with the typical development review process. This is further reinforced by the fact that demographics that would frequently interact with the review process, such as engineers, builders, and architects, all had high rates of agreement with the prompt.





Statement 11.14 – “The time it took to process my Engineering application was appropriate.” – had significantly varying degrees of agreement and disagreement, depending on the respondent’s background. Engineers had the lowest rate of agreement by far at only 8%, indicating that the engineering review process specifically may be slower than other communities that surveyed engineers have worked with. Property developers, a demographic that is typically more concerned with timelines than other demographics, expressed a similarly low rate of agreement at only 17%.

3.5. Overall Development Review Process

The final set of statements focused on the overall development review, permitting, and inspection processes for the City. On average, 268 responses were received for this question set. The following table shows responses to this section overall:

#	Statement - Overall Development Review Process	SA	A	D	SD
1	The development review process is predictable.	7.8%	40.1%	32.7%	19.3%
2	The City made clear the amount of time it would take to process my application.	8.1%	31.1%	38.1%	22.7%
3	The amount of time taken to review and approve my application was acceptable.	9.8%	33.8%	26.5%	29.8%
4	The City met its time commitments for processing my application.	9.9%	35.3%	30.5%	24.3%
5	City staff were accessible and responsive when I had questions regarding my application.	20.1%	50.4%	20.8%	8.8%

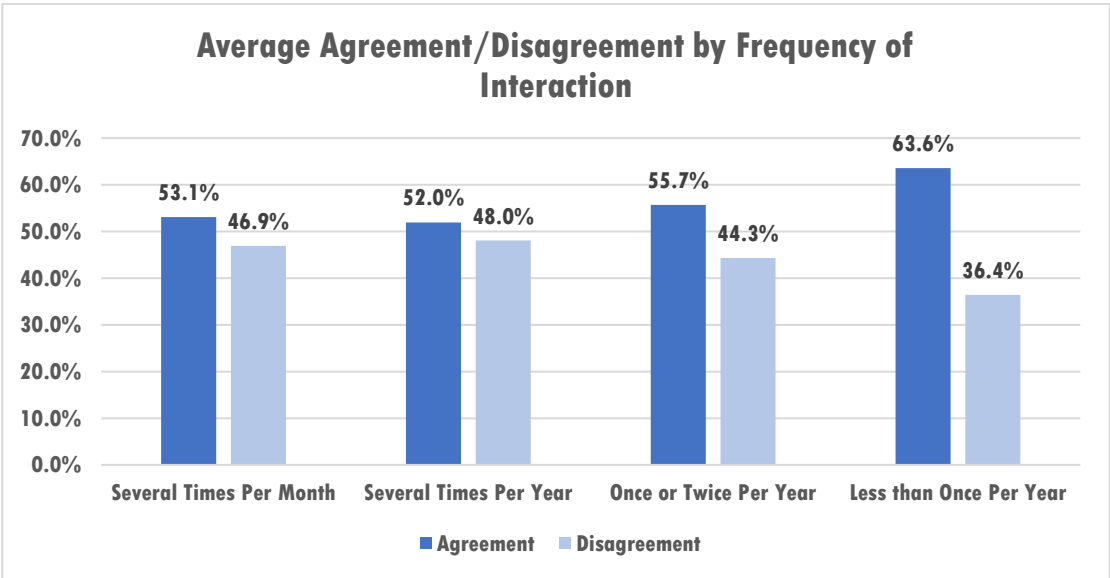
#	Statement - Overall Development Review Process	SA	A	D	SD
6	City staff provided good customer service throughout the process.	21.2%	52.7%	19.8%	6.4%
7	The City did a good job coordinating input from different departments.	11.3%	44.5%	30.4%	13.8%
8	The City's technical requirements were consistent with the codes and ordinances that the City enforces.	12.3%	53.8%	24.5%	9.5%
9	The City provided an efficient online submittal process.	13.1%	48.3%	25.1%	13.5%

Responses to this section were generally the most divisive among question sets pertaining to specific areas of function. Taking an average of all responses shows an overall agreement at 56.1% and disagreement at 43.9%. Some statements, such as the first four of this section, were the only ones in the entire question pool to receive more disagreement than agreement. This indicates that predictability, communication of review timelines, the review timelines themselves, and the coordination between reviewing departments are some for the areas most in need of improvement for the development review process as a whole.

3.5.1. Demographic Insights – Frequency of Interaction

Responses between interaction frequency groups had the largest range for this question set compared to preceding ones. Agreement ranged between 52.0% and 63.6% and disagreement between 36.4% and 48.0%.

The chart below shows average agreement/disagreement across all statements based on how often each respondent interacted:



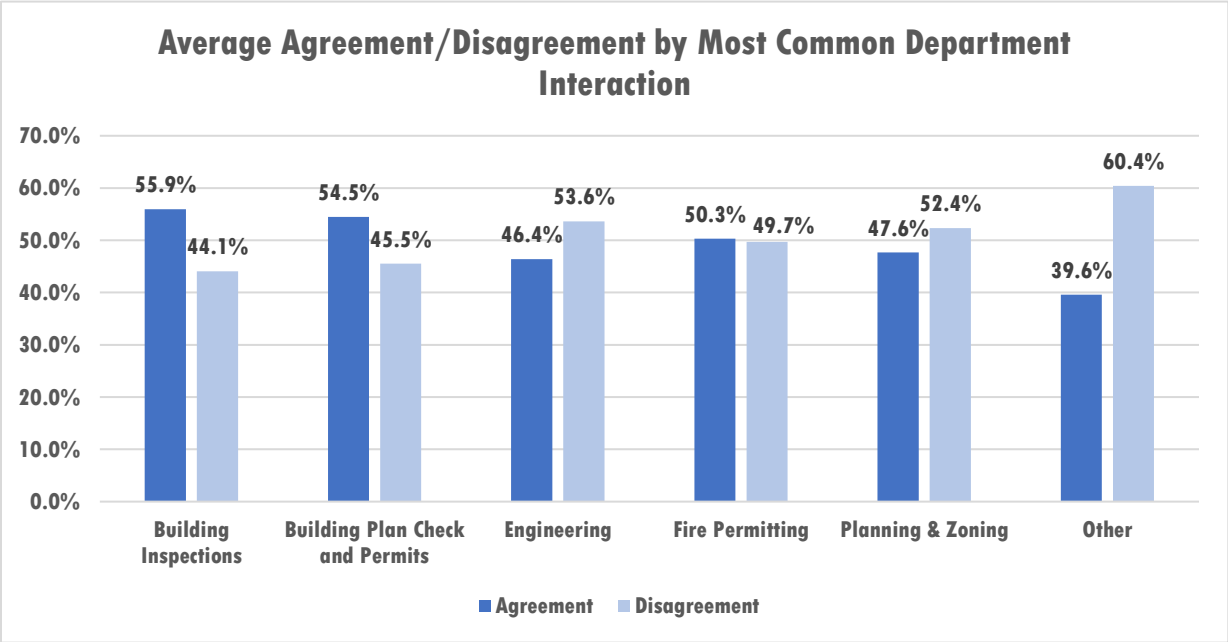
This chart shows that responses were the most closely split between agreement and disagreement than any other question set for this demographic cross section. Statements related to timeliness of application processing times and communication of

associated timelines (#2, #3, and #4) had higher rates of agreement among demographics that interacted with the department less frequently.

This could indicate that applicants who interact with the development review process less frequently have reduced expectations for processing times, while those who interact frequently have higher expectations. Tailoring communication styles based on how frequently an applicant interacts with the process could help in managing timeline expectations and improve customer satisfaction.

3.5.2. Demographic Insights – Department Interaction

Responses for this set of prompts were divisive among all demographic categories. Disagreement rates ranged from an average of 44.1% for the “Building Inspection” category to 53.6% for “Engineering”. The following graph depicts average agreement/disagreement rates by most common department interaction:

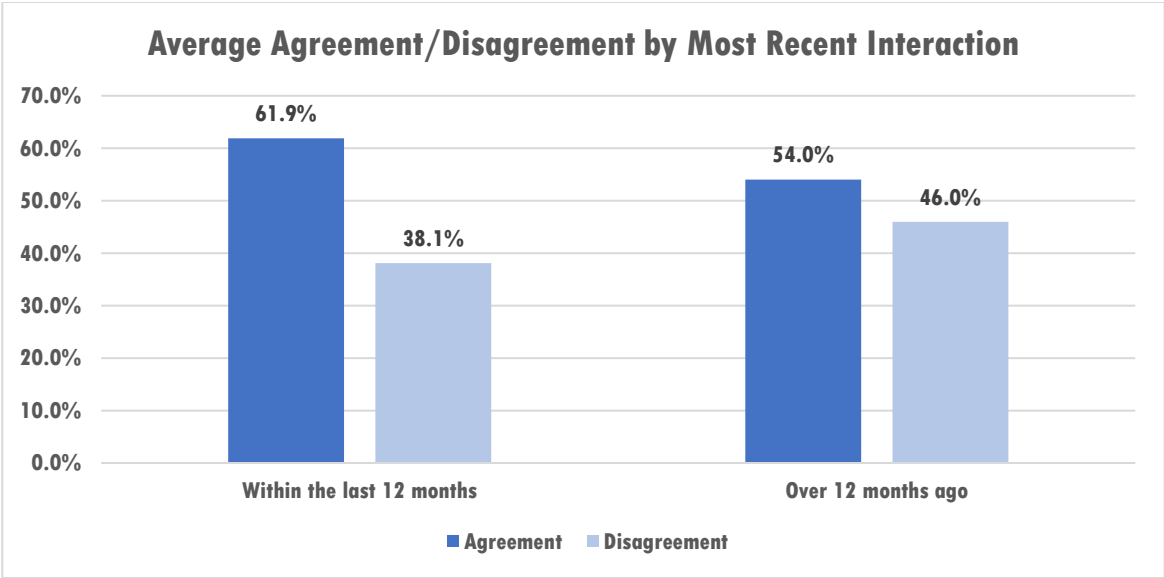


From the graph it can be seen that several demographic categories disagreed more than agreed on average. Specifically, “Engineering”, “Planning & Zoning”, and “Other” disagreed more than agreed, while only 0.6% more respondents agreed than disagreed for “Fire Permitting”. Skip rates among this demographic cross section ranged from 36.2% for “Planning & Zoning” to 61.5% for “Other”. On average, 43.9% of respondents skipped the statement set.

3.5.3. Demographic Insights – Most Recent Interaction

Viewing this question set from “Most Recent Interaction” lens indicates that those who interacted in the last 12 months were 7.9% more likely to agree than those who last interacted over a year ago.

The following graph shows average agreement and disagreement rates by the most recent interaction:

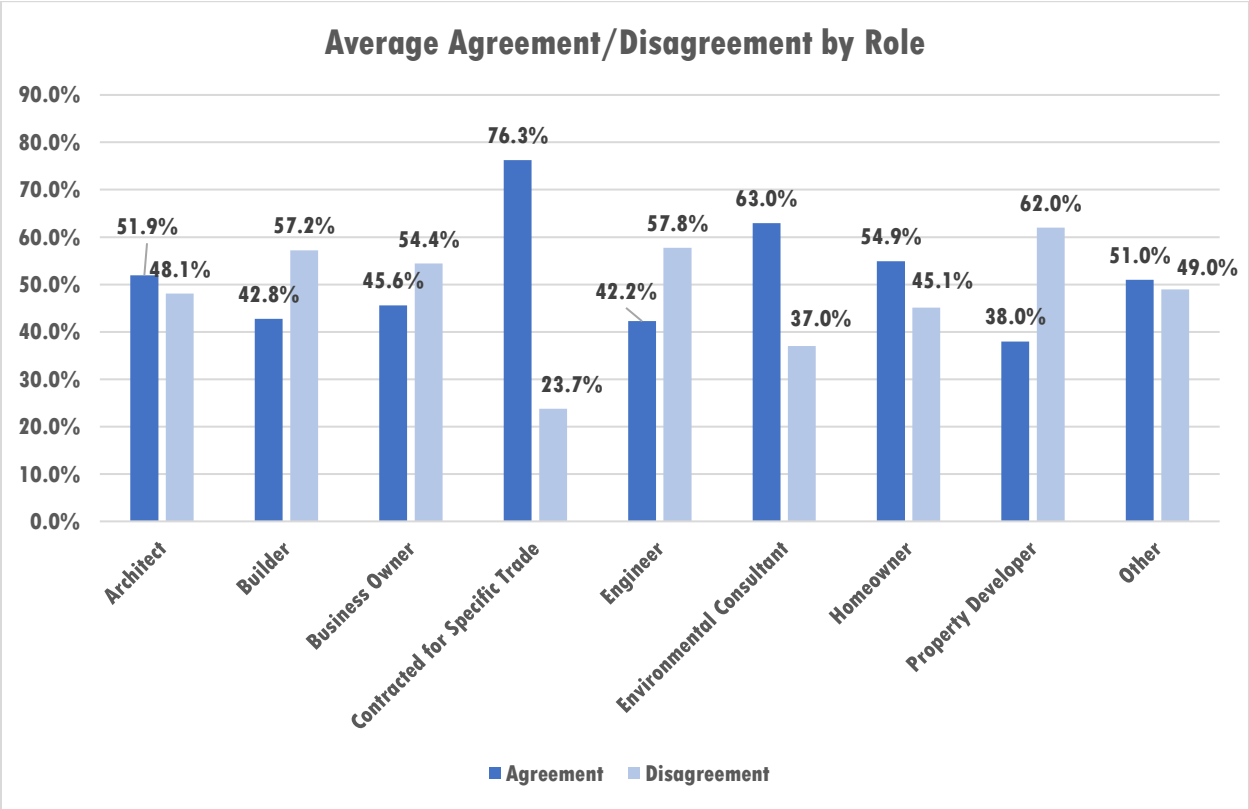


On average, respondents agreed more than disagreed. That said, those who last interacted over a year prior were more 7.9% more likely to disagree than the other demographic. This may indicate that respondents view the prompt set more favorably in light of current performance. Regarding skip rates, both demographic sets were very similar. 47.5% of those who interacted in the last year skipped compared to 46.3% of those who did not.

3.5.4. Demographic Insights – Role

The development review process as a whole varied wildly depending on the role of the respondent. Agreement rates ranged from 38.0% for property developers to 76.3% for contractors, with an average of 51.7%.

The following graph depicts agreement and disagreement rates by respondent’s role:

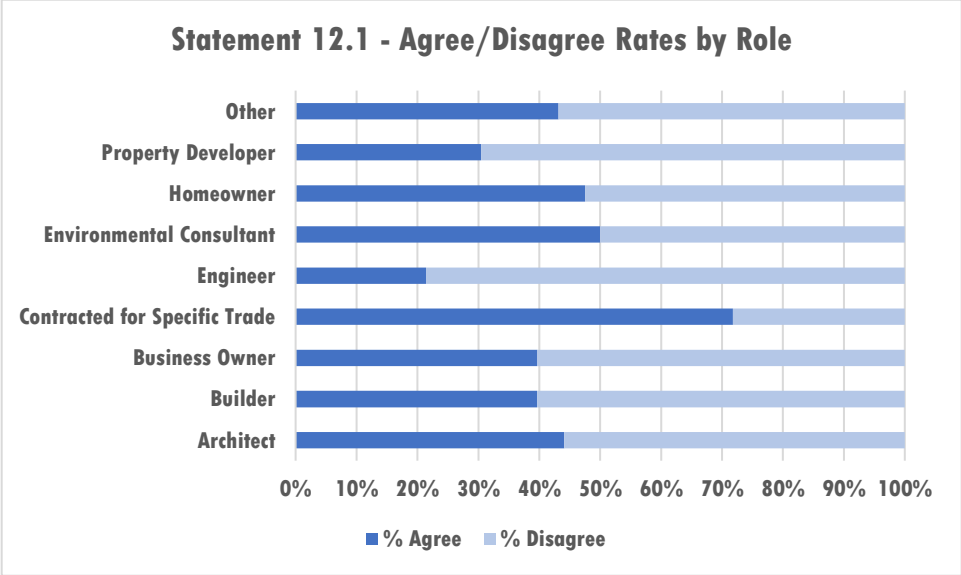


This graph indicates that respondents on the whole are very divided about the development review process. Contractors were by far the most likely role to agree with the statements at 76.3%. Property developers, engineers, and builders were the most likely to disagree at rates of 62.0%, 57.8%, and 57.2%, respectively. Several roles were

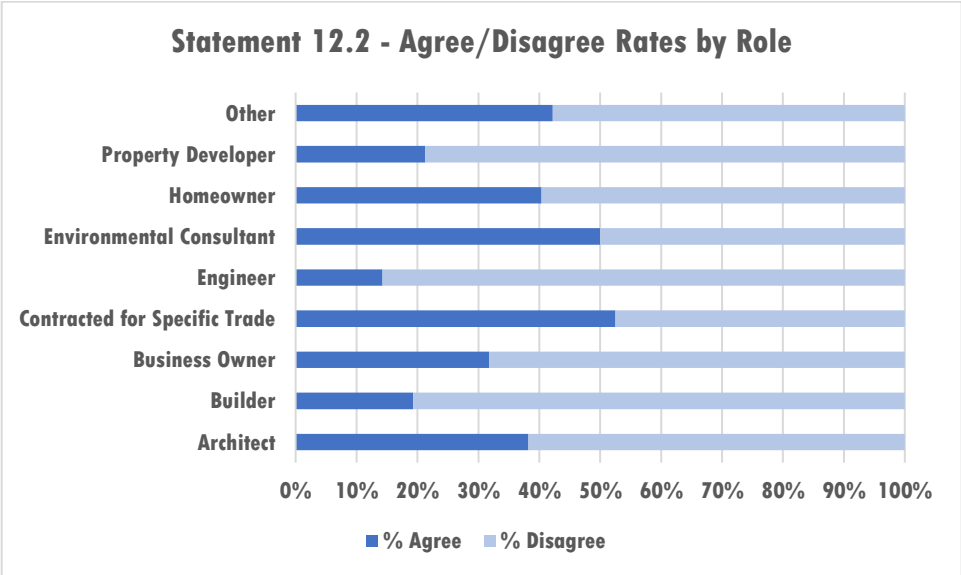
heavily divided in their responses, such as architects who agreed 51.9% and disagreed 48.1% and “other” who agreed 51.0% and disagreed 49.0%.

Skip rates varied widely between demographics. On average, 36.1% of respondents skipped this question set. Skip rates ranged from 0% for environmental consultants, likely due to the small respondent pool, to 52.7% for contractors.

The following graphs depict average agreement and disagreement rates by role for statements that exhibited significant variation in sentiment between roles:



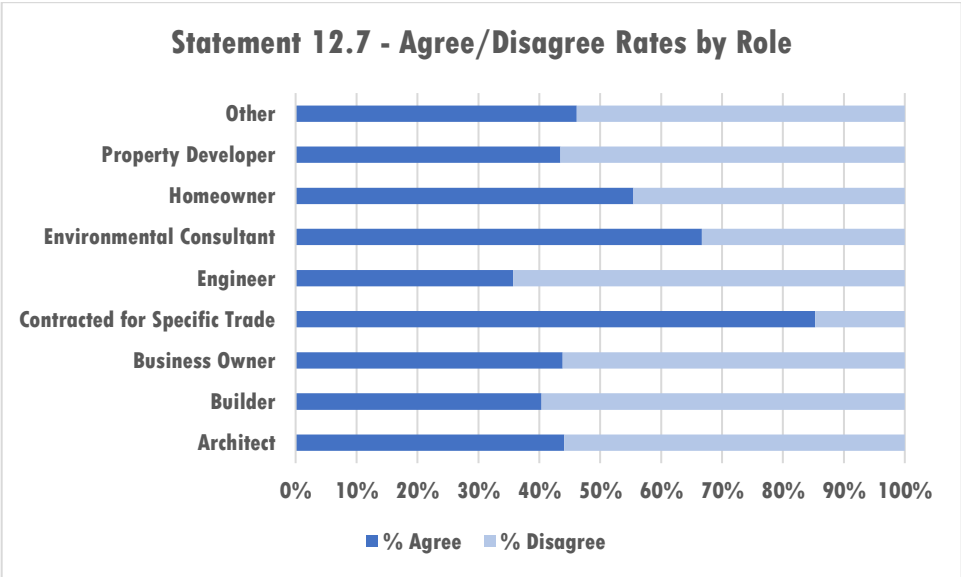
Statement 12.1 – “The development review process is predictable” – had a high rate of agreement among contractors, but lower among other demographics. Engineers had the lowest rate of agreement at just over 20%. This could indicate that, in aggregate, the development review process is unpredictable for some applicants – particularly those processes which engineers would typically engage with. At the same time, processes that contractors would engage with appear to be very consistent and predictable for that demographic.



Statement 12.2 – “The City made clear the amount of time it would take to process my application” – had lowest rates of agreement among property developers, engineers, and builders. This is similar to previous statements that gauged satisfaction with the communication of review times, although the presence of builders among the lowest agreeing is unique for this statement. This could indicate that processes and reviews typically applied for by engineers, property developers, and builders such as building permits and subdivision plats, could use better communicating to applicants. Given this question gauged the sentiment for the development-review process overall, interviews

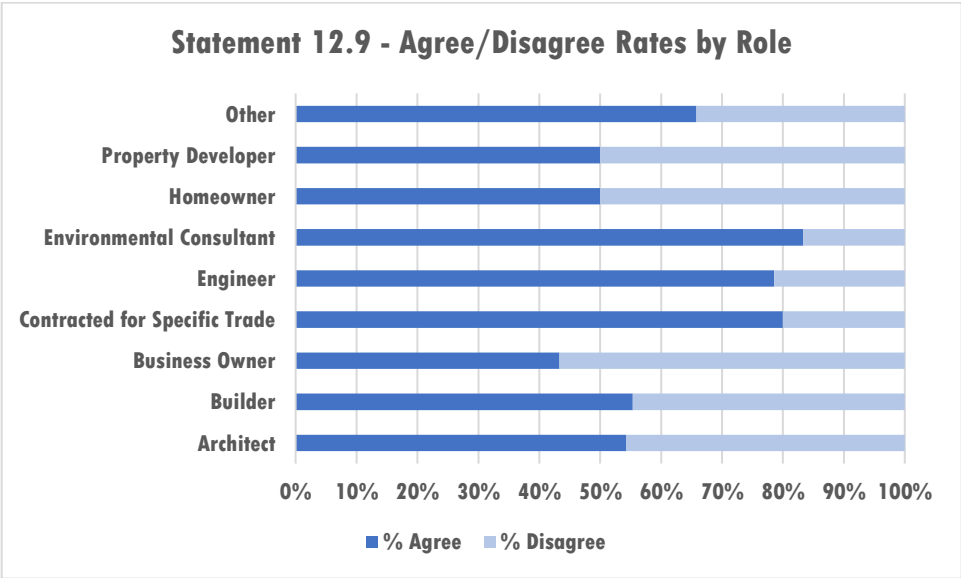
with members of these demographics could provide further insight into which processes are lacking in this respect, specifically.

This general trend of low rates of agreement among property developers, engineers, and builders continues for statement 12.3 – “The amount of time taken to review and approve my application was acceptable”.



Statement 12.7 – “The City did a good job coordinating input from different departments” – had the highest rates of agreement among contractors, environmental consultants, and homeowners. This could indicate that applicants from other backgrounds more familiar with development review view the coordination between departments as less robust compared to other communities. Specifically, coordination between engineering and other reviewing departments could be an area for improvement given the lowest rate of agreement was among engineers.

Statement 12.8 – “The City’s technical requirements were consistent with the codes and ordinances that the City enforces” – had results similar to previous statements of this nature. Engineers had among the lowest rates of agreement, indicating that communication of applicable codes and their connection to development review requirements could be strengthened.



Statement 12.9 – “The City provided an efficient online submittal process” – had the lowest rate of agreement among business owners, property developers, and homeowners. This could indicate that the online submittal process is well tailored for

applicants that are familiar with development review, but less so for homeowners and other demographics that do not interact with permit submittal processes frequently.

## 4. Open-Ended Questions

A series of questions allowed respondents to provide written input into the survey. These questions prompted respondents to provide three strengths, weaknesses, and any other recommendations or information to supplement their response.

### 4.1 Three Strengths

The first open-ended question asked respondents to describe three key strengths in the current development review process. 393 responses were provided by 181 respondents. Content analysis revealed the following key themes: customer service, transparency, professionalism, accessibility, online permitting, timeliness, and staff knowledge. The following sections break down each strength into further detail.

#### 4.1.1 Customer Service

Responses pertaining to customer service were some of the most common among the open-ended responses. This falls in line with the high rate of agreement across customer service related question sets from nearly all divisions in the multiple-choice question section.

Several staff members were mentioned by name multiple times for being particularly excellent at providing helpful, clarifying, or otherwise positive customer service to applicants. One respondent indicated that the helpful and friendly staff helped ease the burden of bad news being communicated by staff, highlighting the importance of quality customer service in any capacity.

#### 4.1.2 Transparency

Clarity of requirements and transparency throughout the approval process were cited several times as a strength of the development review process. Several other respondents expressed that comments and feedback provided following reviews were clear and easy to comply with, simplifying the review process.

#### 4.1.3 Professionalism

Several staff members were again mentioned by name for their professionalism, rapid response times, and consistency in communications. This, along with responses expressing similar strengths, indicates that the department is fostering a workplace culture that places value on quality and effective interaction with applicants.

#### 4.1.4 Accessibility

The value of the online application system and helpful nature of the staff led to numerous respondents mentioning how accessible the review process was compared to other jurisdictions. Several staff members were mentioned for their help in guiding applicants through the review process and ensuring that thorough communication prevented surprises.

#### 4.1.5 Online Permitting

Besides customer service, the online permitting was one of the most commonly cited strengths of the development review process. Many of the respondents indicated that the

ability to upload documents through a web portal simplified the process and made it far more accessible.

#### 4.1.6 Punctuality/Timeliness

Several respondents indicated that the punctuality of development review staff, particularly inspection staff, eased the review process as a whole. In aggregate, city staff were repeatedly commended for their timeliness, punctuality, professionalism, and dedication to supporting applicants of all backgrounds through the development review process.

#### 4.1.7 Staff Knowledge

Staff were frequently acknowledged for their robust knowledge of their respective ordinances and the development review process as a whole. While some responses indicated that this is an area for improvement, more found it as a strength than not. This was especially true for several senior staff members that were mentioned by name, indicating that longtime staff members are critical assets for the development review process and overall client satisfaction.

### 4.2 Three Opportunities For Improvement

The second set of open-ended questions prompted respondents to provide three key areas of improvement in the development review process. 442 responses were provided by 182 respondents. Following content analysis, the following themes were identified as being commonly mentioned or otherwise significant: staffing, coordination, timeliness, communication, online permitting, and consistency. The follow subsections will break down each of these areas of improvement further.

#### 4.2.1. Staffing

One of the most commonly cited issues with the current development review process is that the departments are not staffed appropriately for their current workload. Several respondents indicated that their applications were being delayed or otherwise stalled due to what they perceived as understaffing.

While the exact cause of delays is not clear, it is apparent that several respondents have taken note that staffing does not outwardly appear sufficient for current workloads.

#### 4.2.2. Coordination

Better interdepartmental coordination was referenced specifically as being a limitation of the current development review process. Several respondents indicated that they felt that the review process was too siloed, preventing effective coordination between reviewing departments. Specific divisions mentioned in this context include Engineering, Plan Check, and Fire.

#### 4.2.3. Timelines

Timelines were among the most frequently mentioned areas of improvement for the development review process. Many responses indicated that applicants felt as though timelines were either poorly communicated or simply nonexistent. Several respondents also expressed frustration with timelines that are set being moved or otherwise not kept to.



#### 4.2.4. Communication

Communication with clients and between reviewing parties was referenced frequently through this section. While several respondents indicated happiness with the frequency and quality of communication with city staff, many found it to be an area that could use improvement. Streamlining communication through the online portal and email was cited as a specific means by which this area could be improved. Further reference was made to the communication of timelines and permit approval progress. It should be noted that this may contradict with some respondents who indicated that communication and customer service were a strength of the organization.

#### 4.2.5. Online Permitting

While online permitting received a significant amount of praise, several respondents also indicated that web portal can be onerous and difficult to understand. Further refinement of the online permitting portal will continue to alleviate some of these concerns.

#### 4.2.6. Consistency

Most comments regarding consistency were related to inspection and zoning reviews. While this was a topic mentioned frequently in the responses, consistency in code application can be a difficult practice to improve given the amount of individual deliberation and code interpretation that staff have to conduct on their own.

While policies and guidelines can help improve public perception of inconsistency, some level of this is to be expected where the individual's interpretation of codes and ordinances is a factor.

### 4.3 Open-ended Additional Input

The final question provided to respondents requested them to provide any additional feedback that they may have regarding the development review process or the survey itself. Many of the responses in this section repeated sentiments described in the preceding sections, but three additional themes were identified in this section: cost, processing times, and streamlining.

#### 4.3.1 Cost

Fees and costs associated with the development review process were cited as being burdensome or otherwise significant. Notably, several respondents indicated that transparency of fees was an issue for them, particularly at the beginning of their projects. Making this information more readily accessible for applicants could be an effective way to reduce confusion and improve client satisfaction.

One suggestion for improvement was a fee calculator, enabling potential applicants to determine the cost of their project before occupying city staff's time.

#### 4.3.2 Processing Times

Potentially the most commonly stated frustration with the current development review process. Many respondents indicated that their projects were delayed, stalled, or otherwise prevented from moving forward for significant amounts of time. This is consistent with development review times frequently being ranked among the most disagreed statements in the multiple choice portion of the survey.

4.3.3 Streamlining

Lastly, streamlining was cited as a potential opportunity for improvement. Many respondents indicated satisfaction with the current online web portal, but several others indicated that it could be the basis of further improvements. Recommendations were made to add in further information and instructions related to the development review process, associated fees, and other frequently asked questions.

## Appendix E: SWOC Analysis

As part of the development review strategic plan development, the project team conducted a Strengths, Weakness, Opportunities, and Challenges (SWOC) assessment. The SWOC analysis was held on the afternoon of September 27, 2023. All development review employees from Planning and Economic Development, Fire, and Transportation and Public Works were invited to participate. Of the 78 staff who were invited, 72 participated.

As part of the SWOC analysis, staff identified many items for each of the four areas. To best understand staff’s priorities, an online survey was created so that individuals could prioritize the overall feedback.

In addition to the SWOC prioritization, two open ended questions were provided. These questions focused on mission and value statements and key words.

The online survey was activated on October 9 and closed on October 25. A total of 56 respondents completed the survey and provided feedback.

### 1. SWOC Rankings

Based on strengths that were highlighted during the SWOC session, respondents were asked to rank order the following ten.

Strengths	Score
The people I work with are supportive, collaborative, and have positive attitudes.	8.8
Internal staff have a strong knowledge of their area and are open to cross-sharing of information.	7.8
Leadership supports the staff and are open to process improvements.	7.2
Staff go above and beyond to get tasks done on time.	6.0
Creative problem solving is encouraged.	5.5
Customer service is a core value in the Department, including being able to communicate with bilingual customers.	5.2
There are multiple promotion opportunities offered internally.	3.9
Communication throughout the Development Review process is excellent, including the digital sharing of files and documents.	3.7
We have a high employee retention rate.	3.5
We are a one-stop-shop, which enhances the Development Review process.	3.3

The first four strengths ranked are all surrounding the topic of staff. This included staff’s knowledge, ability to work well together, and support from leadership. However, staff communication was ranked 8 on this list.

The second question asked respondents to rank order of eleven weaknesses that were identified during the SWOC session.

Weaknesses	Score
High workload and limited staff capacity.	10.5
General staff training, including an understanding of the Development Review process.	8.0
Technology concerns, including using proper systems and the training of those systems.	6.7
Managing political influences.	6.6
Outdated codes, standards, and policies.	6.5
Outdated content and information on City website.	6.4
Proactive engagement and reaching out to customers.	5.4
Overall facility management.	4.9
Staff availability at permit counter.	4.3
Succession planning.	3.6
Inconsistencies in third-party reviewers.	3.1

Workload and limited staff scored the highest by a margin of 2.5. This topic is seen as a weakness throughout the survey. Additionally, the statements that were ranked three through five focused on the current limitations of technology systems, the negative impact of political influence, and outdated codes/standards/policies.

The third question asked respondents to rank order ten opportunities that were identified during the SWOC session.

Opportunities	Score
Emphasizing various types of training and professional development.	7.0
Utilizing calendars, centralized emails, and phones for enhanced communication between staff.	6.7
Offering career growth within the organization.	6.5
Implementing collaborative processes that break down silos between offices.	6.3
Evaluating staff assignments to better ensure workload management.	6.3
Digital enhancements to the website and other systems used to communicate with the community.	6.0
Funding opportunities that could address staff shortages/capacity.	5.1
Implementation of software, including AI, that will enhance development review processes internally.	4.3
Enhanced tools to better communicate with Spanish and other non-English speaking people.	4.1
Enhancing ties with educational institutions to further increase hiring abilities.	2.7

The first six opportunities are within one point of each other, indicating several areas that staff see as needing improvements. Topical areas included the need for enhanced professional development, technology utilization and centralization of digital information sharing, greater collaboration between teams, and aligning staff resources with workload

and performance expectations. Also, respondents indicated the desire to offer more career growth opportunities (ranked 3), which aligns with the opportunity to improve staff training and development.

The fourth question asked respondents to rank eleven challenges that were identified during the SWOC session. Challenge statements were focused on the overall success of the City’s development review operations and functions.

Challenges	Score
Aligning workload and staffing levels.	9.9
City Council and City Executive team understanding of the development review process.	7.5
Funding and clear policies regarding training and professional development.	7.4
The prioritization of tasks.	6.7
Communication with the City Council.	6.4
Constant customer service improvement.	5.3
Ability for enhanced digital accessibility for field staff.	5.1
Utilizing consistent approaches for routine tasks such as record retention and open records requests.	5.0
Additional workspace.	4.9
Understanding the big picture and not letting small tasks get in the way.	4.6
Limited City network accessibility across multiple City departments.	3.2

The perceived challenges noted by staff and participants focused on not being properly resourced to handle the current workload and service demands. Also, two of the top five statements discussed City Council and City leadership not understanding the City’s development review process and communication approaches between staff and City Council. Related to elected and appointed leadership, was the prioritization of tasks. During the SWOC session, staff indicated that they often receive competing priorities that come from the direction of City Council or City Management. The evolving nature of reprioritization was perceived as a threat to effective service provision.

Finally, the third ranked challenge was related to funding and clear policies related to staff training and professional development. Respondents indicated that there is limited guidance on how to better equip themselves for their roles and how to grow within their respective team or elsewhere in the City.

3. Narrative Responses

One question of the survey allowed for open responses. This portion allowed respondents to add any open-ended comments they would like to. There were eight total responses. Three of the comments stated that staffing was an issue. One claimed that their department is great at setting low expectations. One stated that in order to be successful, staff need to be in office more, so they have increased access to stakeholders. The other three comments didn’t contain enough substance to analyze.

4. Mission & Vision Statements

Our goal was to formulate base mission and vision statements from the feedback of the survey. The following two questions helped guide respondents in building the fundamentals of those statements.

Respondents were asked to fill in the blank for two statements. The table identifies the rank order of the ten answers they could choose from. The first question asked respondents to rank statement related to the mission of City staff in the development process. The following results were received.

The mission of the City staff in the development process is _____	Score
to provide quality service.	7.8
to provide efficient service.	7.3
to provide good customer service	7.1
to assist the customer	5.8
the provision of a safe environment.	5.6
to regulate the built environment	5.2
to provide equitable development	4.9
to engage with the community.	4.3
to provide predictable service / performance.	3.6
to be an advocate for the community.	3.5

The three highest ranked mission topics dealt with the quality, efficiency, and customer service provided. This points out the importance the team puts on service to their customers. The choices that received the lowest responses were to engage with or advocate for the community. Additionally, the need to provide predictable service and performance was ranked second to last.

The next question asked respondents to rank order key words they believe should be in a mission or vision statement.

Mission/Vision Statement Key Words	Responses
Quality of life	20
Transparent	17
Efficient	16
Collaborative	14
Sustainable	13
Adaptable	13
Inclusive	12
Timely	10
Predictable	9
Accessible	8
Engaging	7
Environmental	6

Mission/Vision Statement Key Words	Responses
Enhancing	6
Resilient	5
Other (please specify)	4

Of the four that selected other, the key words were: Safe (x2), Beautiful, Staff Availability, and Enduring.

The statements that received the highest scores focused on quality of life, transparency, efficiency, and collaboration.

**Example Statements:**

Below are a couple of example mission and vision statements that utilized the key words from the responses received.

**Mission:** The Development Services team collaborates with the community to create and support a thriving development environment for residents and businesses where they can experience a high quality of life, which is achieved through efficient City review processes.

**Vision:** An inclusive development team that is adapting to new challenges and continuing to grow a safe and sustainable City while preserving the historical integrity that makes Santa Rosa unique.