



Permitting Process Optimization and Plan of Action Recommendations Assessment Report

City of Marco Island, FL

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Document Version Control Reference

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Deliverable Control Numbers	1.0 – Initial Deliverable Draft Document	Plante Moran releases initial draft to the City’s Core Team for feedback and to identify specific discussion points.		
Document Purpose	The document represents an independent assessment of the City’s permitting and land management processes based upon Plante Moran’s analysis conducted in November and December 2023. The assessment provides the foundation for recommendations necessary to identify process improvements, provide recommendations related to the current EnerGov system, and address performance improvements necessary to achieve the City’s service level expectations.			
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Version	Author	Date Version Released	Purpose/Revisions	Requested Action
1.0	Plante Moran	2/01/2024	The assessment report represents the observations, assessment findings, and plan of action for the optimization study.	Core Team Review of the assessment observations and findings.
2	Plante Moran	2/23/2024	Revisions represent adjustments based on feedback from Fire.	Core Team Review of the assessment observations and findings.
3	Plante Moran	3/8/2023	Revisions detailing results of visioning and recommendation prioritization.	Final Deliverable

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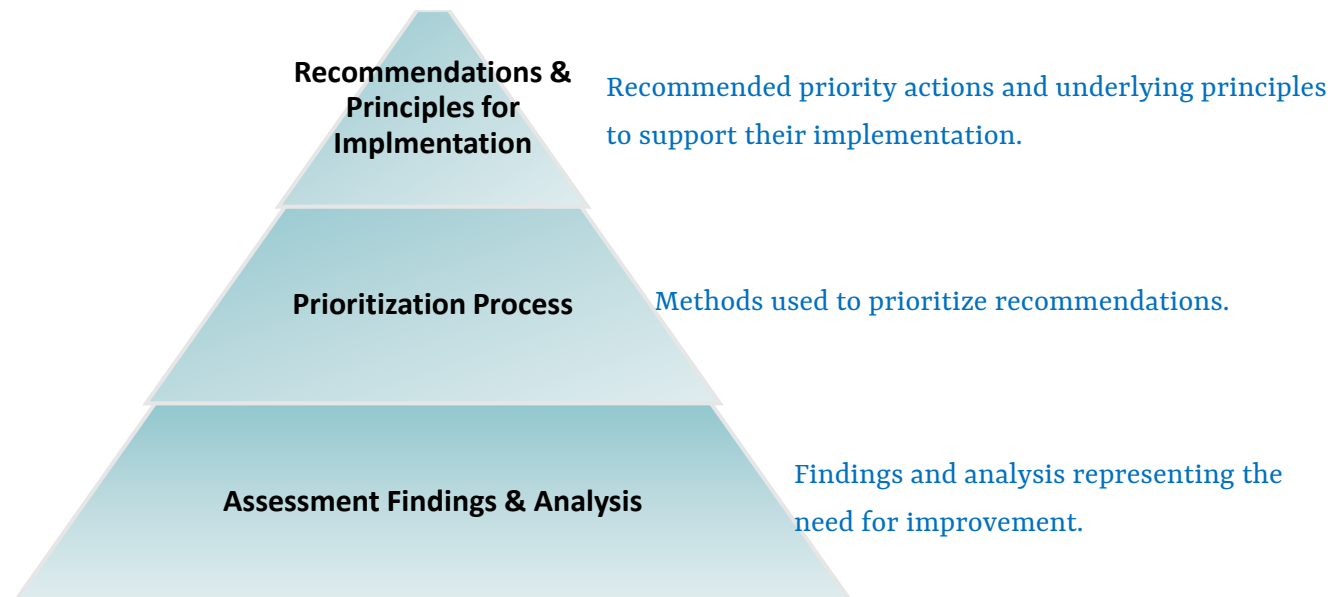
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Assessment Analysis & Priority Recommendations

The City of Marco Island (City) is committed to improving the customer experience and by optimizing its land management entitlement, permitting, and code enforcement processes to support its public service and safety mission. In October 2023, the City retained Plante Moran to conduct an independent, objective review of its land development and construction review processes to improve its customer service capabilities while fulfilling its public safety and public service mission. This assessment presents observations and recommendations for optimizing the City’s regulatory enforcement activities based upon the experiences of Plante Moran’s Public Sector Consulting Team with extensive experience advising rapidly growing communities across Florida and the US. This assessment involved a series of information discovery activities performed in November and December 2023. Key stakeholders included the City’s Departments / Divisions of Building, Growth Management (Planning), Fire, Public Works, Code Enforcement, Information Technology, Fleet & Facilities, Water and Sewer, external stakeholders, and City staff responsible for administering services using EnerGov, an enterprise permitting and licensing software solution from Tyler Technologies. On February 28, 2024 a visioning session was conducted to rank order and evaluate the highest-value recommendations presented by Plante Moran.

Anatomy of the Assessment Report

The assessment report consists of two parts. The first section presents the assessment analysis with the highest priority recommendations. The second component includes supporting appendices consisting of strategic (long-term) recommendations, supporting observations, stakeholder survey results, and tools/resources for the implementation of proposed recommendations.



Call to Action

The City self-initiated this evaluation in response to feedback from a City Builders and Business Owners Roundtable it convened on November 2, 2023. This roundtable discussion revealed opportunities for the City to improve its land development and permitting processes so they are more customer friendly and responsive to customer service needs in the following focus areas:

- **Personal Contact** – Improved customer service with options for in-person service options.
- **User-Friendly Forms/Applications** – Update and simplify forms to ensure requirements are current with requested information.
- **Review Commercial Zoning and Land Use Requirements** – Review the Commercial Land Use (CLU) process by providing a licensing guide centralizing all requirements in a single location.
- **Staffing/Employee Retention** – Promote ways to maintain staffing levels while minimizing staff turnover to promote consistency in reviews and code interpretations.

The City can use this assessment to improve the customer experience, improve responsiveness, meet service delivery expectations, and promote compliance to fulfill expected service levels.

Challenges of the Current-State Situation

Customers receiving planning / zoning, building, and licensing services report deficiencies in its service delivery by not providing accommodation for customers to balance onsite and online services.

The City's online, self-service resources are complex to navigate and some customers require additional assistance to determine applicable codes based upon their project needs. Through feedback received by internal and external (public) stakeholders received through surveys and interviews, there are situations when customer needs are unmet creating gaps of understanding and diminished trust in the review process. This assessment identifies the key factors that reduce the effectiveness of the City's planning, permitting, and code enforcement regulatory review process.

Approach to Performing the Assessment

This assessment focuses on processes, people, and technologies shaping the customer experience. To achieve this goal, the City established a project core team of leaders and subject matter experts from its regulatory review disciplines involved in the City's land development, construction permitting, and code enforcement processes. These stakeholders were involved in the following activities:

- A stakeholder analysis was performed during project initiation to understand staff roles and responsibilities.
- Interviews and surveys were used to assess for business functions, team resources, and processes improvement to evaluate both internal (staff) and external (public) stakeholder perspectives. Observations from these interviews are documented in **Appendix B: Observations by Process Area**.
- Recommendations were designed to optimize service delivery with a focus on continuous improvement promoting responsive customer service that is sustainable.

A project charter document was adopted with sponsorship from the City Manager's Office. The findings and recommendations in this report were prepared through data, observations, and insights from Plante

Moran's Public Sector Technology and Operations Consulting Practice with recent and diverse experience advising Florida communities. Plante Moran prepared its independent analysis of completed questionnaires, interviews, and analyses of available documentation. City staff and customers were forthcoming, honest, and candid in their representation of the City's needs.

Expected Project Outcomes

The City's project team was committed to addressing identified customer service delivery obstacles and fulfilling the following business outcomes:

- Prioritize recommendations for the improvement of the customer experience with specific tools and implementation resources reflective of industry best practices aligned to City services.
- Compile observations to support the evaluation of the current-state processes for identified scope areas as outlined in **Appendix F: Scope Evaluation Areas** that represent the service delivery areas for analysis.
- Provide a summary of findings for opportunities associated with future-state improvements.
- Evaluate ways to configure Tyler Enterprise Permitting and Licensing System (EnerGov) to align with best practices for land development entitlement and construction permitting functions.
- Incorporate the perspective of internal and external stakeholders directly engaged in the process. See **Appendix C: Survey Responses** for additional background.
- Identify key customer touchpoints where personal staff interactions offer enhanced value.
- Determine key City resources necessary to promote the identified improvement recommendations.
- Promote consistency in the interpretation and application of codes to promote predictable outcomes. See **Appendix E: Sample Performance Measures** for examples of performance measures.
- Identify options to streamline the Commercial Land Use / Zoning review process.

Assessment Findings and Analysis

1. **Customer service** is a key area for continuous improvement. Internal and external stakeholders involved in the stakeholder interview and discovery process identified current practices with opportunities to improve customer service operations for the City's land management processes.
 - Streamline the routing of customer service requests. Currently, staff are completing duplicate work by managing multiple channels and are experiencing challenges with managing volume and properly documenting requests.
 - Provide expanded in-person service options. External stakeholders appreciated the opportunity to meet with staff in person. The City will need to restructure its service delivery model to provide more in-person service delivery options.
 - Provide greater focus on consistent customer response and answer delivery to ensure a consistent customer experience achieves expected service outcomes.
2. **The City's investment in customer success resources is necessary to increase overall satisfaction.**
 - The depth of content / technical level of detail for the City's online resources is robust. With this rich repository, there is an opportunity to improve navigation so the experience is less complex and easier to interpret for owner-builders or customers who infrequently interact with City.
 - Redesigning self-guided, online resources to aid customers so they can confidently submit applications and information for the most frequent types of projects was identified as a significant improvement area.
 - Anticipate customer needs based upon staff recognition of customer obstacles. Creating a feedback loop for customers and staff is necessary so City staff can recognize changes in customer needs and responsively address them.
3. **City Departments are not fully using the capabilities EnerGov to simplify and manage work activities.** Staff report high workloads yet many are performing activities outside of EnerGov creating inefficiencies. While the City's Building staff is using EnerGov for all of its processes and is very familiar with the system's capabilities there are other departments who are working outside the system.
 - Promote efficiencies by using the capabilities of EnerGov across relevant City departments using the Building Division as a model for other disciplines in the review process.
 - Transform manual processes so they can be automated for applications or activities that are high in volume and low in complexity.
 - Customer success metrics can be easier to measure when staff recognize where automation can create value for both the customer and staff involved. This will require ongoing training investments and continuous improvement mindset across all review disciplines.
 - The City should expand its submittal options to achieve the highest rate of online submittals as possible by using EnerGov's self-service portal utilizing automated tools native to the system (ex. forms, automations).

4. **Public access to permit status transparency and decision support tools** is limited.
 - Staff often manually retrieve requested records than can be satisfied through the portal.
 - Several basic requests such as inspection requests, status reporting, contractor licensing submittals, payments for some review processes, etc. are managed outside of EnerGov.
 - Unclear instructions for basic processes create confusion for the development community and as a result, external stakeholders reported a need for “knowing the right person to contact”.
5. **There is currently limited use of performance measures to assess customer success as the City works with its customers as partners to achieve compliance.**
 - To improve and inform future decision-making, the City should harness available performance measures and reporting tools and consider opportunities to track customer success metrics (see examples provided in Appendix E: Sample Performance Measures).
 - Designing performance measures to inform staffing decisions, work allocation, workload rebalancing, and employee performance will promote greater staff accountability and commitment to customer success throughout all stages of the development review process.
6. **Manual work is occupying a considerable amount of staff time.** Staff in every area interviewed identified tasks with automation potential that they were completing manually. Incorporating additional automations and integrations into standard process will save staff time and resources.
 - The City should employ a change management focus to document existing processes and identify manual actions between business and technical users to make improvements to current processes to find new process efficiencies.
7. City staff involved in land management processes generally have a **clear understanding of existing procedures**. While not all focus areas had defined standard operating procedures for their major processes, it was evident that most staff understand the requirements for major processes. An additional area of strength is that staff appeared to be cross trained for some processes.
 - Promoting consistent standards of operation to reflect procedures and practices across all development process areas will promote staff training and development activities.
8. Gaps exist in areas related to **process management**. There appear to be challenges related to public expectations to improve the coordination across City review disciplines spanning multiple departments. A major concern expressed from the City’s customers and staff was the resources necessary to coordinate requests to follow up on project comments.
9. The **process to manage special events** has been evolving and identified as an improvement area. New staff have been added to this process and the City continues see increased demand for special events review services. Standardizing this process to align with the land management process will be beneficial to ensure future events are viable from a public safety and City services standpoint.
10. **The City’s Commercial Land Use and Zoning Certificate process is creating challenges for both staff and customers. Understand the City’s policy direction** for balancing economic development and City code compliance will impact staff’s future ability to manage and enforce City Ordinances. Several other processes such as the special events process and plan review process can be supported by defining the City Administration’s desired policy direction.

Process to Prioritize Recommendations

Through a facilitated visioning process, City stakeholders evaluated the recommendations in **Appendix A – Recommendations for Success** based upon detailed observations in **Appendix B – Observations by Process Area**. The visioning process enabled stakeholders to prioritize the recommendations into importance (benefit) and capacity/capability using the following priority matrix.



The project team members ranked recommendations using according to the factors represented below:

- **Importance**
 - Benefit to the customer
 - Benefit to staff
- **Capacity/Capability**
 - Simplicity to implement the change
 - Capacity to implement the change

The team categorized upcoming activities into two phase areas to prioritize upcoming implementation of recommendations:

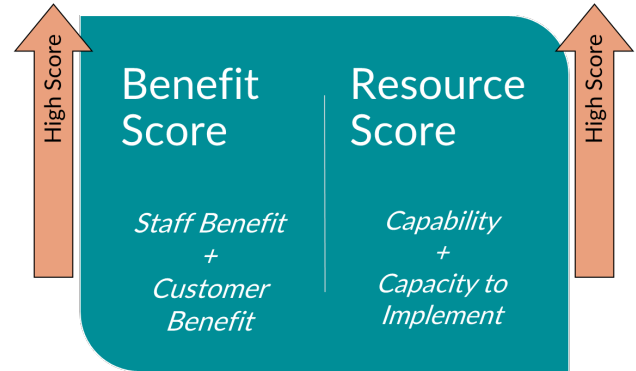
- Phase 1: “Prioritize to Complete Now”
- Phase 2: “Qualify and Schedule to Complete”

Implementing the recommendations proposed is an organization-wide effort involving eight departments participating in the land development and permitting process. **Appendix H** introduces the **Customer Success Team Framework** used to define, assess, prioritize, implement, and sustain customer service improvements. It is used to responsively act upon service enhancement requests from customers and staff so they can be evaluated on their overall cost and benefit.

High-Priority Recommendations

Phase 1 Items from City of Marco Island Staff: “Low Hanging Fruit” or items identified as “Prioritize to Complete Now.”

These recommendations received both high benefit scores and high resource scores, meaning while the items may be considered low effort or “low hanging fruit,” the City has capability and capacity to implement these and will prioritize to complete first.

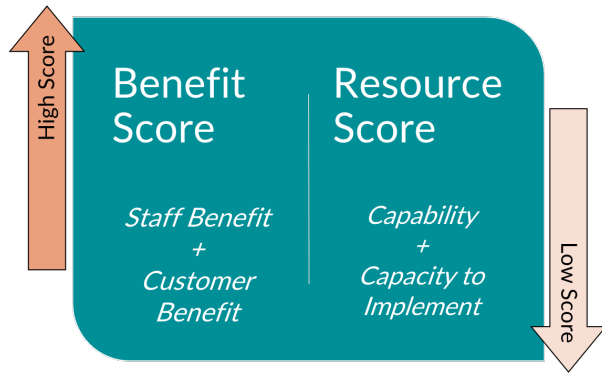


Category	Focus Area	Recommendation
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Increase Staff Awareness of Customer Project Needs	A.1.c Provide standardized and ongoing customer success training for new staff and refreshers for existing staff. Focus on building skills in managing customer expectations.
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Redesign Existing Customer Resources	A.2.d Outreach to professionals in the development community to introduce updated practices, processes, and outreach. Educate the professional, high-volume customers to work in partnership with the organization.
B. Promote Continuous Improvement in Technology	Evaluate and Prioritize Process Improvements to Expand Public/Staff Access to EnerGov	B.2.b Enable read access for all reviewers in EnerGov. While permissions may be managed, promote transparency among reviewers.
B. Promote Continuous Improvement in Technology	Evaluate and Prioritize Process Improvements to Expand Public/Staff Access to EnerGov	B.2.c Promote customer ability to enter their own applications online and focus specifically on high-volume, low complexity type applications. Promote the benefits of streamlining processes that enable the City to reduce review times.
D. Develop Pathways for Staff Development and Succession	Increase and Promote Staff Development Opportunities	D.1.a Prioritize staff career and professional development and certifications, trainings, etc.
D. Develop Pathways for Staff Development and Succession	Create Staff Succession Opportunities for Land Management Business Functions	D.2.a Assess opportunities to improve the staff experience by utilizing existing resources to improve common processes. Provide staff with the opportunity to voice their ideas to make changes to process, system, and roles to improve service delivery. Institute a Customer Success Team to provide a structure to implement these ideas.

Phase 1 Recommendations from Plante Moran: Identified as “Prioritize to Complete Now” with additional third-party resources and/or expertise.

Plante Moran also identified a group of high-priority recommendations from the initial list provided. These were identified independently from the City’s ranking/scoring efforts. Plante Moran recommends the City consider these recommendations as high priority as they begin implementing improvements:

Category	Focus Area	Recommendation
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Redesign Existing Customer Resources	A.2.a Streamline information available online and points of contact/inquiry for common questions.
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	A.3.a Create a Customer Success Team (See Appendix H: Customer Success Team Framework) involving staff stakeholder departments in Growth Management, Building, Parks and Rec, Fire, Police/Code Enforcement, Public Works, Utilities, and Fleet & Facilities. Charge this Team to qualify, evaluate, and institute changes to EnerGov, improve processes, and educate customers to improve the review experience and reduce permit or application cycle times.
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Create a Feedback Mechanism for Customers and Staff	A.4.a Measure customer success at interim points for a given review life-cycle to represent awareness of customer needs and expectations. Frequently provide information to the applicant throughout the review process to promote transparency.
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Create a Feedback Mechanism for Customers and Staff	(A.4.b) Seek policy direction (from Council) on items such as high-profile challenges that are difficult to fulfill with current Code regulations or processes involving the CLU process.
B. Promote Continuous Improvement in Technology	Increase Reliance on the System of Record (EnerGov)	(B.1.a) Migrate all major land development and related application processes into EnerGov. Establish a process for other departments to receive resources for EnerGov’s configuration and management.
C. Streamline Processes for Consistency	Implement Business Process Improvements	(C.2.b) Develop current-state process maps for development review activities, standard operating procedures, and promote standardization for service delivery and staff training.
C. Streamline Processes for Consistency	Revise Special Events Submittal and Review Processes	(C.5.a) Fully evaluate and develop the special events process by category and manage participating resources.



Phase 2 Items Identified by Marco Island Staff: Priority items with additional resources needed, as identified as “Qualify / Schedule to Complete.”

These recommendations received a high-benefit scores with a lower resource score, meaning City staff viewed these items as important, but they require additional resources to implement the recommendations. Lower resource availability may require the involvement of third parties or additional services budget resources.

Category	Focus Area	Recommendation
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Redesign Existing Customer Resources	A.2.b Institute public information plan to update public-facing materials on the City website for all elements of the land development review process.
A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers	Redesign Existing Customer Resources	A.2.c For all applications, educate customers on the top ways they can ensure application completeness during the first round of review (“first-pass success”).
B. Promote Continuous Improvement in Technology	Increase Reliance on the System of Record (EnerGov)	B.1.a Migrate all major land development and related application processes into EnerGov.
B. Promote Continuous Improvement in Technology	Increase Reliance on the System of Record (EnerGov)	B.1.c Utilize existing data and records to improve information available in EnerGov. Utilize dashboard and reporting features to make data-driven decisions regarding service level delivered.
B. Promote Continuous Improvement in Technology	Evaluate and Prioritize Process Improvements to Expand Public/Staff Access to EnerGov	B.2.d Measure number of automated customer service notifications providing real-time notifications of status to customers (inspection notifications).
B. Promote Continuous Improvement in Technology	Transform Manual Processes with Automations and Integrations	B.3.c Implement integrations that will benefit business users and eliminate manual effort or rework.

Category	Focus Area	Recommendation
C. Streamline Processes for Consistency	Implement Technology Process Improvements	C.1.a Implement processes to eliminate manual effort on frequent requests, such as providing public access to common records and developing reports for common processes.
C. Streamline Processes for Consistency	Implement Technology Process Improvements	C.1.c Eliminate existing shadow systems (duplicate record systems) to promote a single source of truth with the EnerGov system where possible.
C. Streamline Processes for Consistency	Institute Performance Measure Improvements	C.3.a Institute performance measures to manage for the quality of customer submissions to improve completeness while reducing customer and/or staff rework.
D. Develop Pathways for Staff Development and Succession	Create Staff Succession Opportunities for Land Management Business Functions	D.2.b Provide greater visibility of continuous improvement activities to demonstrate how staff involvement at all levels creates opportunities for growth and achievement.

Principles for Implementation of Recommendations

The following principles are intended to guide the implementation of the recommendations provided.

Fulfill Customer Commitments and Provide Ongoing Outreach to Customers

Increase Staff Awareness of Customer Project Needs

Staff interviewed displayed an overall general willingness and desire to promote positive customer service in the community. In addition to an overall positive attitude regarding customer service functions, City staff can consider tactical changes to staff geography and availability of services that will improve the public's perception of customer resources.

Following the example of other agencies with defined customer success strategies is an excellent starting point for customer experience improvements. The State of Washington Governor's Office for Regulatory Assistance has published Best Practices for Local Government Permitting in response to rapid development in coastal communities in the Pacific Northwest. The State's strategies recognize and fulfill customer commitments using six success themes for permitting success including:

1. Fostering continuous understanding with agencies, industry, and elected officials
2. Engaging stakeholders and reviewers early in the process.
3. Defining what makes a complete application ensuring applicants know what a complete application requires for their project.
4. Consistently analyze the entire process for improvement opportunities by measuring customer success and performance outcomes.
5. Use technology to improve overall communication and make records accessible to promote transparency.
6. Introduce staffing resource flexibility for high volume periods where staff are cross-trained to manage high volume requests.

Specifically, stakeholders expressed interest to have access to in-person customer services staff. The following areas were identified as opportunities to promote access to hands-on resources and customer service:

- Offer office hours to receive and address common questions and educate customers who may not be able to navigate online resources.
- Increase customer access to centralized customer service resources.
- Provide a "One-Stop Shop" customer experience where answers to questions can be provided in-person, as necessary. This will promote coordination with the City's other review departments with other co-located, public contact staff.
- Introduce and maintain opportunities to convene applicants with reviewers in a central forum like the City's Builders and Business Owners Roundtable.
- Promote user-friendly, online resources for common customer service needs.
- Increase training to promote staff comfort with customer service functions.
- Continuous improvement review of public-facing customer service functions.

An effective way to improve customer service tools at the City is to evaluate opportunities to reduce the level of effort for the customer to complete frequent tasks. The following examples were identified as opportunities to reallocate staff time through efficiencies when customers provide their own self-service:

- Eliminate staff manual entry of application materials into the portal that result in submission errors due to misinterpretation.
- Transition manual staff review of PDF applications so they are migrated to online submission forms using EnerGov.
- Inspection request time windows that can be customer-selected.
- Performing requests via call/email that can be entered into a customer success portal for more efficient management and status tracking.

Redesign Existing Customer Resources

Both customers and staff reported challenges with maintaining several customer service request systems of engagement. Major challenges included managing the volume and preventing multiple staff members from responding to the same request. Specifically, there is not currently a mechanism for documenting requests outside of email records so they can be associated with applications, cases, and/or events.

An additional opportunity area is to redesign the owner-builder and contractor materials on the City website. While the City provides extensive online resources, they are currently underutilized as customers disregard them as overly complex or they are uncertain as to how they are relevant to their project or situation. External stakeholders found the City's existing online material challenging to understand. While making information accessible is positive, making the information useful promotes customer success. Assessing the City's user experience throughout the journey of the application from submission to completion provides a strong customer-focused framework.

City of Tampa, FL, has developed homeowner resource guides that can be referenced as a model example here: <https://www.tampa.gov/construction-services/homeowner-resources>

Decision support or development guide technology could greatly benefit the City's delivery of land management services. Providing a customer experience and enabling customers to receive consistent answers to frequently asked questions. This will create a process where customers receive the same answer each time and is available to customers online 24/7. For example, decision-support guides can enable customers to utilize GIS information to select a property and identify the proper steps in the process to fulfill submission criteria. Standard functionality of these tools typically allows staff to see valuable insights into performance metrics about how the public is interacting with these tools and what common pain points exist. Reference **Appendix I – Permit Decision-Support Guides** for examples of decision-support tools that can offset request volumes and provide consistent answers across all staff and disciplines.

Establish a Customer Success Team

Stakeholder interview feedback revealed great staff interest to collaborate on improvements to addressing shared problems and they were supportive of a forum to jointly find solutions through collaboration. An option to accomplishing this is to create a Customer Success Team with members of each review function of the land development review process.

The Customer Success Team would be represented by individuals who are involved in administering in Planning and Building functions spanning all review areas (Fire, Public Works, Utilities, Building Services, Floodplain, Environmental, Police/Code Enforcement) to support customer success in all review areas. Functions of the Customer Success Team can be modeled after peer communities including:

- ❖ Providing applicants information on City processes, boards and hearings, and development opportunities and guide applicants to be successful by anticipating common customer friction points.
- ❖ Promoting business retention and economic development within the City through promoting compliance and understanding of the City's development processes.
- ❖ Addressing opportunities to manage customer expectations regarding timelines and attentiveness within the review process.
- ❖ Support the identification of process improvements involving all review disciplines, spanning multiple departments, across the land development process like the role of a project manager.
- ❖ Promote cross-training for staff so staff appreciate each step of the customer's journey through the regulatory review process and provide greater capacity to cross-serve in emergencies or high demand periods. It will also promote staff succession planning so a path for career growth within the City organization.
- ❖ Come together monthly to present customer needs, qualify improvement ideas, and report performance metrics with context to leadership. Provide a process for defining and reporting ideas to leadership and seeking direction on challenges that arise.

Create a feedback mechanism for customers and staff to submit process improvements

During the discovery process, it was understood that staff generally listened to customer needs. However, there is not an existing feedback mechanism that customers can use to communicate their concerns or improvement ideas in a structured, ongoing way. This lack of a forum can cause customers to escalate issues to City leadership that could be resolved without escalation. The City can address this by introducing a customer experience survey designed to receive feedback at different point throughout the development review/construction process. See **Appendix D – Customer Satisfaction Survey Example** for an example of a customer satisfaction survey that can be easily administered using a reoccurring basis to better understand customer needs, friction points, and service improvement opportunities.

Promote Continuous Improvement in Technology

Increase reliance on the land management / permitting system of record (EnerGov)

An important continuous improvement initiative will be to migrate all land development processes into EnerGov. While some divisions complete most of their processes in the EnerGov system, others are completing parts of their processes and some are processed entirely outside the system. As part of the City's continuous improvement efforts, the City should plan to either migrate or integrate processes into EnerGov. Using a phased approach, the City could begin with lower complexity processes. Further, it was understood that there are some applicant submittal processes in Growth Management that differ between application types or applicant. As part of the migration plan, the goal should be to receive most application submissions through the portal with the goal of avoiding rework and creating consistency.

The City has an opportunity to elevate service delivery through the expansion of the City's customer self-service tools. Currently, online self-service inquiry and application processes are limited customer service options across divisions. Staff can significantly reduce time spent responding to general calls and emails for status and basic records request through making these self-service resources available. Create the means to capture the number of self-service transactions that customers complete without staff intervention. This will validate the effort spent automating where customer benefit is measured.

Promote transparency

There are several areas where the City can improve internal and external transparency in the land management process. In terms of internal transparency, during interviews, some reviewers were identified without direct access to EnerGov. This requires significant coordination between staff to communicate project details via email and can result in potential loss of information over time.

By requiring applicants to submit through the portal, the City can communicate estimated process (review) times by application type, which will help to manage overall expectations and improve external transparency. When applicants centrally access greater information, they will appreciate the benefits of tools representing major application milestones directly in the system (e.g., checking permit status without calling, scheduling an inspection, seeing inspection scheduling details, reviewing inspection results, etc.).

Transform manual processes with automations and integrations

Throughout the discovery process, staff interviewed reported high workloads and challenges with review volumes of applications/cases. Managing processes outside of EnerGov creates inefficiencies and ultimately results in time lost during key points in the review process. Beginning with low-complexity processes, such as inspection requests, the City should begin by creating current-state process diagrams to reflecting processes that staff are manually administering. The City can use future-state diagrams to represent how processes can be configured and managed in EnerGov. Additionally, consider developing key automations to notify applicants of specific steps in the process and review expectations to reduce staff call and email volume.

Several system integrations with EnerGov were identified as a part of Plante Moran’s review, including:

- **Municode – Standard Comment Library:** Code sections can be retrieved from planning, building, and code enforcement ordinances so frequent types of staff reviewer corrections can be cited on plan reviews, inspections, and code cases. Changes to ordinance text can be immediately cited within standard code sections.
- **Computer Aided Dispatch (Police Department):** Code Enforcement Process – Code Compliance Officers are double-entering information between CAD and the EnerGov Code Compliance Module. Synchronizing information between both systems increases overhead on staff and creates issues with timeliness reporting.
- **Fire Prevention Mobile Software (MobileEyes):** The ability for Fire Prevention staff to reference annual (occupancy) inspection details in MobileEyes while referencing building permitting in EnerGov should be explored. Non-permitted construction may be identified during annual inspection processes triggering code compliance investigations. Alternatively, Fire annual inspection staff can identify properties with open construction permits that may present life safety compliance considerations (e.g., temporary ingress/egress signage, deactivated alarm panels, etc.).

Streamline Processes for Consistency

Implement technology process improvements

During interviews, staff identified opportunities to build upon the success of the City’s existing EnerGov system configuration. While it appears that many processes are working well, many staff identified improvements for the end-to-end permitting process. Examples include improvements to hold features, sufficiency reviews, consistency across modules, access to all review staff, among others.

In addition to minor adjustments for staff-facing features, improvements to public-facing EnerGov functionality will create major benefits for both staff and customers as not all divisions are not utilizing EnerGov tools for many public facing functions.

Consider introducing public access tools for high-volume, low-complexity tasks such as inspection scheduling, contractor registration, simpler applications. As a part of the overall continuous improvement initiative, seek to migrate all processes and forms into the EnerGov system. Doing so will significantly reduce staff time spent responding to requests and enable applicants to perform many tasks independently without contacting City staff.

Recognize the benefits of business process improvements

The following areas were identified where the City could benefit from further business process improvements. By documenting current-state business processes, staff will achieve a consistent baseline understanding of review activities facilitating both staff and customer training. The following areas offer the City potential benefit based upon Plante Moran’s observations and analysis.

- Issuance and Documentation of Stop Work Orders
- Tracking Conditions of Approval

- Assignment of Reviewers in EnerGov
- Appeals (Interpretation and application of Land Development Code)
- Commercial Land Use Policy Enforcement
- Special Event Permitting including review by Zoning / Growth Management
- Addressing

Use performance measures to represent customer success

With a modern, enterprise land management system, the City has a strong foundation to elevate its capacity to manage processes and personnel with data driving decisions. Specifically, the City can utilize the system performance measures that will provide valuable information on personnel and process effectiveness to leadership. The City can better translate the effectiveness of its services by using measures that are meaningful to the customer.

Examples of performance measures detailed in **Appendix E** of this assessment report:

- Plan Review Cycle Times: Time from City's determination of submittal complete to the time the City returns plan reviewer provides comments back to the applicant.
 - Intake to Review Coordinator: Time from application receipt to reviewer assignment.
 - Customer Success: First submittal success rate for application completeness.
 - Average number of outstanding plan reviews per plan reviewer (backlog).
 - Average number of daily inspections assigned and completed by inspector (average inspections per FTE).
 - Average number of daily plan reviews completed per plan reviewer (based upon complexity).
 - Average time to issue "over the counter permits" without plan review.
 - Number of online permit applications processed per day.
- > See example performance measures and KPI's from the [City of Port St. Lucie Building Department FY 2021-2026 Strategic Business Plan](#) and in Appendix E.

Introduce a City Development Review Team

A major theme identified during the interview and stakeholder analyses was that applicants and staff involved in the development review process experience challenges in coordination. Applicants are challenged to identify and contact reviewers from each City review discipline to clarify comments prior to resubmitting applications and/or plans. City staff spend significant time routing customer questions so they can be answered by disciplines spanning multiple departments. The City could benefit from a defined review board process, which is common at peer communities. This board, which would function like a "Development Review Team" or "Development Plan Review Committee," is effective in providing applicants the forum to ask questions of all reviewers at a single time. This forum also provides staff the opportunity to reinforce process steps and eliminate future confusion, as well as provide face-to-face feedback, which was identified as important to stakeholders (see **Appendix C - Survey Responses**).

Evaluate the special events submittal process and use EnerGov to manage the process

One of the areas identified for process improvement was the City special event process. Those involved in the review process noted that a recognized staffing need was acknowledged through hiring of an additional staff member to help with the special event process. This has created an established backup and additional resources to process special event applications. As the City seeks to improve the special event permitting process, it is important to recognize that the special event process should be defined and tailored for each of the following areas:

- Public events on public property
- Private events on public property
- Private events on private property

While there will undoubtedly be overlap in process and policy in the special event process overall, distinguishing between special events in this way will enable staff to best manage the approval process and staff public resources accordingly.

An additional area of consideration for the special event process is the level of effort and timeframe necessary to complete reviews and assign City resources. The review time frame should consider the number of steps in the process and level of effort for each step, including coordinating on-site presence for the events. Current and future state process mapping can be utilized to help better define the desired future state improvements.

Develop Pathways for Staff Development and Succession

Focus on development opportunities for staff

Staff development is an improvement area the City can work to improve for all staff involved in administering land management processes. The success from current cross-training initiatives can be modeled to train for key customer friction points where reviews may halt during high volume submission periods or employee time out of the office. For key customer service positions, customer service training should be consistently administered and reinforced to build staff confidence and effectiveness.

EnerGov offers capabilities for managing work and process activities. In assigning work, supervisors should inform decision-making directly from workload management metrics. Using performance metrics to substantiate reviews, evaluate workload, and deliver quality service will promote staff performance.

Create succession opportunities within land management roles

Interviews with staff revealed that most subject matter experts had been in the same position during their entire tenure with the City. Promoting staff involvement in continuous improvement initiatives to demonstrate to staff how engagement at all levels creates opportunities for growth and achievement. Consider staff succession opportunities to train and develop existing staff to advance into new roles. Provide opportunities for staff in positions with relevant training and certification opportunities to independently complete trainings as incentive for advancement. The City of Port St. Lucie FL has a staff succession program on page 12 of its [City Building Department's Strategic FY21-26 Operations Plan](#).

Report Appendices and Implementation Resources



Appendix A – Recommendations for Success

The recommendations outlined include strategies and actions involving people, processes, and technology to achieve expected business outcomes. They involve changes requiring deliberate planning to engage the public, develop staff, and measure the benefit of services delivered. The City should calibrate its capabilities and resources over time to meet performance expectations as customer service expectations change. The City’s approach to implementing future improvements involves seven categories of activities designed to elevate customer service while ensuring the City can measure and sustain the positive changes anticipated.

Legend:

- * Phase 1 Recommendations: (“Prioritize to Complete Now”)
- ** Phase 2 Recommendations (“Qualify and Schedule to Complete”)
- ^ Plante Moran’s Identified Priority Recommendations

A. Fulfill Customer Commitments and Provide Ongoing Outreach to Customers

Recommendations	Observation by Process Area #
A.1. Increase Staff Awareness of Customer Project Needs	
A.1.a Develop office hours for common review functions or elements of the process receiving high volumes of requests.	1b, 1c
A.1.b Evaluate opportunities to reduce the level of effort requiring lift by the customer to complete frequent tasks.	9e, 10b
A.1.c* Provide standardized and ongoing customer success training for new staff and refreshers for existing staff. Focus on building skills in managing customer expectations.	1d
A.1.d Schedule office hours for Building Services Division customer service staff at City Hall to provide a “One-Stop Shop” customer experience where answers to questions can be provided in-person, in coordination with other City review departments with co-located, public contact staff.	1c
A.2. Redesign Existing Customer Resources	
A.2.a^ Streamline information available online and points of contact/inquiry for common questions.	1a, 1b, 1c, 7a, 8a
A.2.b** Institute public information plan to update public-facing materials on the City website for all elements of the land development review process.	1a, 4a
A.2.c** For all applications, educate customers on the top ways they can ensure application completeness during the first round of review (“first-pass success”).	1b, 4c, 4d, 10e
A.2.d* Outreach to professionals in the development community to introduce updated practices, processes, and outreach. Educate the professional, high-volume customers to work in partnership with the organization.	1b, 2a, 2c

Recommendations	Observation by Process Area #
A.3. Establish a Customer Success Team	
A.3.a ^ Create a Customer Success Team as a conduit for educating customers on ways they can improve the review experience and reduce permit or application cycle times.	11d
A.3.b Establish and refine customer performance measures that measure transaction effectiveness and not just the volume of transactions.	12c
A.4. Create a Feedback Mechanism for Customers and Staff	
A.4.a ^ Measure customer success at interim points for a given review life-cycle to represent awareness of customer needs and expectations. Frequently provide information to the applicant throughout the review process to promote transparency.	10b, 11d
A.4.b ^ Seek policy direction on items such as high-profile challenges that are difficult to fulfill with current Code regulations or processes involving the CLU process.	3d, 4e, 10b, 10f, 11e

B. Promote Continuous Improvement in Technology Resources

Recommendations	Observation by Process Area #
B.1. Increase Reliance on the System of Record	
B.1.a**^ Migrate all major land development and related application processes into EnerGov.	2a, 2g, 5d, 6a, 11a, 11c
B.1.b Develop an ongoing process to submit, qualify, and implement new capabilities promoting customer success. Establish reoccurring Customer Success Team meetings to submit ideas to City leadership (e.g., Special Event Management).	11a
B.1.c** Utilize existing data and records to improve information available in EnerGov. Utilize dashboard and reporting features to make data-driven decisions regarding service level delivered.	6b, 6c, 7b
B.1.d Begin documenting the level of effort for EnerGov support using a centralized incident management system to reflect the actual effect to support EnerGov management tasks.	12b, 12c
B.2. Evaluate and Prioritize Process Improvements to Expand Public/Staff Access to EnerGov	
B.2.a Expand self-service inquiry via online portal resources and tools. Consistently measure the number of self-service transactions fulfilled by customers (e.g., permit status inquiries, inspection results, scheduled inspection dates, etc.).	2a, 2b, 3e, 4a, 4d, 5d, 7a, 8a, 11a
B.2.b* Enable read access for all reviewers in EnerGov. While permissions may be managed, promote transparency among reviewers.	9b, 11g, 12d
B.2.c* Promote customer ability to enter their own applications online and focus specifically on high-volume, low complexity type applications. Promote the benefits of streamlining processes that enable the City to reduce review times.	2a, 2b, 8c, 11a, 11b
B.2.d** Measure number of automated customer service notifications providing real-time notification of status to customers (inspection notifications).	2f, 3f, 4a
B.2.e Prioritize, assess, and schedule a project portfolio of technical enhancements that directly associate with process improvements.	3f, 3g, 5b, 12b
B.3. Transform Manual Processes with Automations and Integrations	
B.3.a Ensure high-volume activities like contractor licensing renewals are managed via online self-service application processing.	2c, 2d, 3h, 4c, 5c
B.3.b Assess option to streamline resubmittal/reinspection processes to automate fees, creating increases in overall accountability for applicants.	3d, 4e
B.3.c** Implement integrations that will benefit business users and eliminate manual effort or rework.	3h, 5a, 9f

C. Streamline Processes for Consistency

Recommendations	Observation by Process Area #
C.1. Implement Technology Process Improvements	
C.1.a** Implement processes to eliminate manual effort on frequent requests, such as providing public access to common records and developing reports for common processes.	1f, 1g, 2c, 4a, 8a, 11b
C.1.b Implement adjustments in EnerGov to build upon user-observed challenges in the current system promoting staff and customer access.	2d, 2f, 3f, 3g, 4c, 5a, 5c, 5d, 8d, 10c, 12d
C.1.c** Eliminate existing shadow systems (duplicate record systems) to promote a single source of truth with the EnerGov system where possible.	2g, 11a, 4d
C.2. Implement Business Process Improvements	
C.2.a Initiate a change management process that is used to revise standard processes and operating procedures to streamline the review lifecycle creating a consistent experience for customers and staff.	2e, 3a, 4b, 9a, 10d, 11d, 11g, 11h, 12d
C.2.b^ Develop current-state process maps for review activities without standard operating procedures to create standardization for service delivery and staff training.	4f, 9c, 9g, 10a, 11d, 12a
C.3. Institute Performance Measure Improvements	
C.3.a** Institute performance measures to manage for the quality of customer submissions to improve completeness while reducing customer and/or staff rework.	3c, 10b
C.3.b Identify number of hours saved per application by eliminating rework situations such as resubmittals, corrections, coordination between involved parties, common questions, etc.	1f, 3c, 3e
C.3.c Measure employee performance in terms of effectiveness as part of staff annual review processes.	3a, 3c, 6c
C.3.d Seek leadership direction and communicate on level of service and desired review times. Staff according to data representing volume of work and effort required.	3b, 3c, 7b, 11f, 11g
C.4. Establish Development Review Board Consisting of Cross-Departmental Reviewers	
C.4.a Create an internal review board to streamline coordination between applicants and reviewers early in the development process. Document interactions throughout the development process.	3e, 8b, 9d, 12d
C.5. Revise Special Events Submittal and Review Processes	
C.5.a^ Fully evaluate and develop the special events process by category and manage participating resources.	11c, 11d, 11e

D. Develop Pathways for Staff Development and Succession

Recommendations	Observation by Process Area #
D.1. Increase and Promote Staff Development Opportunities	
D.1.a* Prioritize staff career and professional development and certifications, trainings, etc.	1d, 1e, 7b
D.1.b Recognize and develop mitigation strategies to address barriers to staff career development.	1a, 1d, 3b
D.1.c Utilize performance metrics to assign and evaluate work. Link performance metrics into all levels of staff evaluation starting with supervisors, managers, and directors.	3c, 7b
D.1.d Identify cross-training opportunities for key customer service friction points (e.g. FEMA Flood Review Process) so plan review disciplines have greater capacity to review applications during higher submission periods.	1d, 1f, 3a, 7b, 9c
D.2. Create Staff Succession Opportunities for Land Management Business Functions	
D.2.a* Assess opportunities to improve the staff experience by utilizing existing resources to improve common processes. Provide staff the opportunity to voice their ideas to do so.	1f, 5b, 7b
D.2.b** Provide greater visibility of continuous improvement activities to demonstrate how staff involvement at all levels creates opportunities for growth and achievement.	1b, 3c

Appendix B - Observations by Process Area

The following table contains key observations from each process area obtained through the discovery steps described in the Assessment Approach section of the Executive Summary. These observations may include gaps or opportunities.

1. Building Permitting - General				
#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
1a	Customer Service	There is some public confusion surrounding what number to call or email for specific questions.	Review City documents and online information for clarity and conciseness. Consider opportunity to reduce the volume of email addresses and phone numbers provided and route through a trained team at the City to avoid requiring the public to make an interpretation on the correct person / division to contact.	Clarifying and reducing the options / points of contact will eliminate public confusion in determining who is the best point of contact for their question. Streamlining online tools will reduce customer fatigue and frustration.
1b	Customer Service	External stakeholders noted a desire for on-site presence to complete customer service functions. Staff indicated applicants request to meet with each discipline for plan review comments in person, which requires a significant amount of staff time and often call or email to request this. Additionally, the Building Services website and Contact Information page presents limited information on services available onsite and customer service hours.	Clearly detail customer service functions, location, and availability online. Communicate this information on department resources and outreach. Consider opportunities to develop and communicate “office hours” for specific functions where applicants may meet directly with certain disciplines or employees at specific times.	Providing clear messaging surrounding customer service offerings will make the customers aware of what it offered. Defined office hours may eliminate calls / emails and provide customers an opportunity to ask plan review / discipline related questions in person.
1c	Customer Service	It appears Building Services customer service is provided at a different location than Planning and Zoning customer service requests. This	Consider opportunity to provide building and planning resources at the same location. This could include relocating staff or having a member of each team perform customer	Providing consistent resources and eliminating the need for customers to travel between

1. Building Permitting - General

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		requires customers to travel between multiple sites to complete land management activities.	service functions at the same location for continuity of service.	multiple locations for answers will reduce customer frustration.
1d	Staffing	Permitting staff are cross-trained and rotate across permitting functions, including intake. City staffing challenges include staffing the customer service counter and hesitation surrounding perceived customer desire for immediate answers to questions.	Provide consistent customer service training opportunities to building permit intake staff. Focus on the topic of “setting expectations” and training staff to manage customer situations where the answer may not be immediate.	Helping staff learn to best manage expectations will reduce the demand on intake staff to know the answer to every question. Further, implementing an office hour program may help intake staff route specific trade-related questions to available plan reviewers or inspectors.
1e	Staffing	The City offers permit staff the opportunity to complete ICC Permit Technician training and exams. It was observed that many staff are completing ICC courses but are not sitting for the certification exam.	Consider opportunities to emphasize the importance of these accreditation courses to staff. Options include additional pay or bonus incentives, remote work to study for examinations, and departmental recognition.	Emphasizing the desire of the City to promote certified / ICC accredited intake staff will create additional ownership in the intake process, promote continuous education, and reflect positively on City staff to the public.
1f	Reporting	Reporting tools have been established in EnerGov. However, these do not align with some standard reporting requirements and desired KPIs. There is room for improvement to develop reports that best meet the needs of supervisors and staff completing required reports.	Create a list of desired KPIs and work with City EnerGov team / Tyler EnerGov team to develop reports that present desired information. Examples identified during the interview process include timeliness reports for over-the-counter permits, timeframe between final inspection and permit	While developing reports will require initial effort, this will ultimately save considerable staff time and allow staff to easily pull reports. If the amount of effort is documented before and after the reports are instituted, this will

1. Building Permitting - General

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
			closeout, and standard questions asked during Building Code Grading and Effectiveness Scale (BCGES) reporting process or Community Rating System (CRS) reporting process.	also provide valuable insight into the value of the change.
1g	Records	While applicants may view some information online via the public portal, building information is not widely available to search. Specific records are requested through the City Clerk’s Office and routed to Building staff to retrieve from EnerGov. The current process leads to a perceived lack of transparency and creates additional call and email volume for staff across multiple departments.	Establish capabilities to search all records available under the Florida public records law on the EnerGov portal. If information is to be phased, start with records that will satisfy high-volume, low-complexity requests. When residents or applicants call or email to request records, use the opportunity to provide education on the public search functions and build confidence in new features.	Increasing the availability of information available online will significantly reduce amount of staff time spent on producing responses to record requests and will increase transparency in the overall process.

2. Building Permitting - Intake

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
2a	Technology	Building Permitting staff members are utilizing EnerGov to complete the majority of building permitting functions. A major exception is applications / forms, which are available on the City website as PDFs. Use of PDF forms requires staff to	Develop plan to migrate PDF forms for all elements of the review process into EnerGov forms. Establish EnerGov forms that require applicants to provide specific information prior to submitting the application. Explore further options with Tyler to build out tools for license holders signature in EnerGov and	Use of EnerGov forms will take staff effort to develop at the front end of the process. However, this will eliminate manual effort to verify application completeness and remove back-and-forth common

2. Building Permitting - Intake

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		manually verify all blanks/boxes are completed. Staff indicated that many applicants do not completely fill out documentation, requiring staff to return the documentation.	explore options used by peer communities to satisfy this requirement. Incorporate input from potential reviewers in the design and configuration of new processes and forms.	during the application submittal process.
2b	Application Submission	Common customer service complaints include challenges submitting owner-builder applications. Currently, several tools exist to share information related to permitting on the website. However, resources can be clarified and targeted at owner-builders or homeowners specifically. External stakeholders indicated challenges utilizing current materials to complete necessary functions.	Consider opportunities to build out owner-builder and homeowner resource guides on the City website. Utilize user experience best practices to streamline information and route customers to logical pages or documents to retrieve information with simple, consistent naming schemes.	Build out of materials for homeowners that is clear, concise, and easy to navigate will allow owner-builders and residents to determine answers to questions without calling or emailing staff, reducing staff time needed to complete these functions. Providing these resources will empower owner-builders to use EnerGov tools available for a streamlined permitting process.
2c	Contractor Registration	Contractor registration documents are typically submitted to building staff through Spiceworks. Building staff then manually enter documentation into EnerGov.	Establish online applicant portal submission tools in EnerGov for applicants to submit documentation directly.	Allowing the applicant to submit contractor registration materials directly will reduce duplicate effort and eliminate manual staff entry.
2d	Contractor Registration	Staff experienced challenges with contractor registration hold functions in EnerGov. It was noted that current holds not effective in	Work with internal EnerGov team to determine if desired changes can be made to update hold functions to better track contractor registration expiration dates.	Establishing more specific rules for holds more tailored to expiration tracking will help to better manage the contractor registration process

2. Building Permitting - Intake

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		tracking expirations or necessary renewals.	Consider opportunity to request assistance from EnerGov support team to build out additional functionality if needed.	overall and ensure contractors are properly licensed for the duration of each project.
2e	Fees	The process for administering or assigning plan review fees is not fully defined. There appears to be some level of interpretation required in assigning plan review fees during the review process. When a plan review fee is assigned at the beginning of the process, staff do not hold the review based on the fee collection.	Work with Departmental leadership to determine clear direction on if and when plan review fees will be applied to permits. Develop and document a consistent policy, document in an SOP, and train staff on the process.	Further defining this process removes room for interpretation necessary in the current process and provides a consistent experience for all applicants and staff.
2f	Sufficiency Review	There is currently no review stop in EnerGov for sufficiency review. Staff manually notify applicants of any initial deficiencies. Staff manually move the application to a “hold” status if they have contacted the applicant regarding deficiencies.	Add a sufficiency review stop in EnerGov and eliminate the step to create a manual hold. Document the new process in an SOP. Determine if this review information will be automatically routed back to the applicant upon issuance of sufficiency comments.	While adjusting this process may require upfront configuration and training, it will ultimately provide a more consistent user experience and eliminate manual entry and emails currently required.
2g	Impact Fees	Building staff track impact fees in an external spreadsheet, creating two sources of information for applications requiring impact fees.	Explore options to track impact fees in EnerGov. Explore further options with Tyler to build out tools for impact fees in EnerGov and explore options used by peer communities to track impact fee payments.	Maintaining one source of record for building permits will create a more consistent overall records-maintenance and review process and eliminate effort of reviewing multiple databases.

3. Building Permitting – Plan Review

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
3a	General Review	There is some lack of consensus surrounding the assignment of reviews for individual review disciplines. The current policy is for all reviews to be routed to certain disciplines and the reviewers determine if a review should be completed. Alternatively, some disciplines noted they feel reviews may be missed.	Prepare records of the number of reviews currently reviewed by discipline. Request each review division prepare a comprehensive list of reviews that are required by applicable law or ordinance. Consider holding a reviewer workshop to discuss any modifications to the review process. Request division leadership direction, informed by volume of reviews and other relevant data, on routing of plans and if the policy will remain consistent with today's practices and what changes may be necessary. Document all review processes in applicable SOPs.	Defining the review process will help balance workload, provide leadership transparency into relevant metrics regarding the review process, and create a data-driven review process.
3b	Review Deadlines	There is a perceived staff pressure to meet assigned 10-day deadlines for reviews. Staff reported working overtime or late hours to complete reviews within the timeframe set in EnerGov. Further, staff reported that this focus on meeting deadlines was as a result of direction / understood City goals in recent years.	Request division / City leadership direction on the desired turnaround for review. Substantiate effort needed to complete review times versus staff capacity with data. Evaluate current practices to better determine the setup in the EnerGov system and adjust as needed.	Better understanding the staff effort required to complete specific practices will enable leadership to provide direction on desired level of service for review turnarounds.
3c	Review Deadlines	There is no current mechanism to show Key Performance Indicators on demand. Lack of ability to show the	Establish KPIs / report in EnerGov to show the number of days that demand is over capacity to serve. This report could be taken to	Better understanding the staff effort required to complete specific practices will enable leadership to

3. Building Permitting – Plan Review

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		days that demand is over capacity to serve is causing staff to take on additional work to complete all reviews.	leadership to show current staffing levels and substantiate if additional staff members are needed. Additionally, consider work being done in other systems of record (including future integration opportunities) when reporting on performance measures.	provide direction on desired level of service for review turnarounds.
3d	Review Management	City policy has not consistently been to charge additional fees for failed reviews. However, there appear to be challenges from multiple reviews, resubmissions with simple errors, etc. Lack of additional fees for additional reviews creates a lack of accountability for applicants to resolve errors.	Consider option to charge permit applicants for resubmissions at a defined point.	Creating an additional fee and process step for failed applications / resubmissions may incentivize first pass success.
3e	Process Management	One major use of staff time is coordination between contractors and property owners that hired the contractor.	Implement mechanisms to advise property owners and contractors of changes to application status. Allow distribution of comments to multiple contacts. Further, establishing a self-service public-facing online portal will reduce back and forth from owners “checking in” on contractor progress via phone/email, such as inquiries on simple items such as revision submission date.	Overall increases in transparency will reduce staff time spent coordinating between the applicant and contractor and reduce staff time responding to requests for information.

3. Building Permitting – Plan Review

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
3f	Technology	Staff reported significant time was spent resolving / responding to frequent submission errors, page numbering issues, etc.	Consider tools to automate low complexity steps in the permitting process (ex. page numbering, versioning, labeling).	Standardization around submissions and implementing automations for low complexity, frequent issues will help save time.
3g	Technology	File management appears to be a major challenge of the permitting / plan review process.	Institute steps to standardize submissions and naming conventions for projects. Using EnerGov forms / the portal for submissions will lend to this process. Utilize BlueBeam tools for page numbering and sequencing challenges.	Increased reliance on EnerGov and technology tools available will provide improvements to the current file management and related processes.
3h	Technology	Staff are not utilizing any standard comment library or integration to standardize review comments. There are limited resources on “commonly failed items” for plan reviews.	Establish an integration between MuniCode and EnerGov.	Standardizing corrections list will ensure instructions to resolve deficiencies identified during the review process are clear.

4. Building Permitting – Inspections

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
4a	Inspection Scheduling	There are several processes to schedule inspections. The City website requires applicants to call different phone numbers for various City divisions and varies based on inspection type. The lack of consistent	Standardize inspection requests by establishing the main point of acceptance as the EnerGov portal. You may choose by policy to accept requests by phone or email, but it is not recommended to encourage the multiple formats on the website or materials. It is	Harnessing EnerGov tools to request inspections will significantly cut down on staff time spent maintaining the inspection request line, reduce manual effort to enter into

4. Building Permitting – Inspections

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		inspection scheduling processes may cause confusion for applicants in the scheduling process.	recommended to encourage a central point for submissions.	EnerGov by hand, and eliminate confusion from multiple channels available.
4b	Inspection Scheduling	For some inspections, requests may be submitted until 7 PM on the day prior to the requested inspection. While this allows applicants additional time to request inspections, this requires staff presence in the evening to coordinate requests. Additionally, this goes beyond standard practices of what is offered at many peer communities across the state.	Consider the level of service desired and option to reduce the cut-off time to an earlier time such as 4 PM. Utilize data to assess how many inspection requests are received between 4 PM and 7 PM to inform this decision. This proposed change will allow scheduled staff to review and schedule inspection requests during normal business hours.	While this change may result in a slight reduction in level of service, this effort may be reallocated to other efforts that best serve the department’s customer service goals.
4c	Inspection Management	The City utilizes some unique inspection types in EnerGov, which appear to be working well in general. These include setting up “inspection types” for required documentation submittals, such as Elevation Certificates. One common issue is applicants not attaching the correct materials.	Establish submission rules in EnerGov, such as requiring an attachment prior to letting the applicant submit the request in the system.	Use of EnerGov tools to automate actions now taken by staff will continue to reduce staff time spent on manual tasks.
4d	Inspection Management	Managing expectations appears to be one of the greatest challenges for inspection scheduling. Some inspectors noted they must change	Requiring customers to schedule through EnerGov will help manage expectations by providing customers a scheduled time and date. Establish rules in the system and allow	Encouraging inspection scheduling in EnerGov and instituting practices that inform the applicant of inspection time at

4. Building Permitting – Inspections

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		the scheduled date to other dates based on scheduling. Staff noted the expectations of scheduling inspections out a few days has incentivized the public to submit inspection requests prior to site readiness. One major area where this is an issue is landscape inspections.	inspector management of availability to avoid date shifting and keep expectations consistent.	the time of inspection will help manage expectations moving forward.
4e	Inspection Management	Most disciplines are not requiring re-inspection fees which creates additional lack of accountability for inspection readiness / site to plan accuracy on the first attempt.	Consider option to charge permit applicants for reinspections at a defined point.	Creating an additional fee and process step for failed inspections may incentivize first pass inspection success.
4f	Stop Work Orders	The process to administer Stop Work orders upon inspection of work without permits being done is currently undefined. Staff are unclear on the process for Stop Work Orders.	Develop and document a standard process for Stop Work Orders and violation of unpermitted work in the City.	Further defining this process will ensure staff are prepared to administer this process in a consistent way when confronted with unpermitted work.

5. Code Enforcement

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
5a	Technology	Code Enforcement officers utilize both CAD and EnerGov for documenting daily activities. Information is manually	Evaluate feasibility of an integration between the City’s CAD system and EnerGov.	Establishing an integration will eliminate double entry required across two systems, saving significant

5. Code Enforcement

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		entered into both systems. This requires significant rework and double-entry.		time and reducing potential inconsistencies across systems.
5b	Technology	Code Enforcement is not currently utilizing mapping tools in EnerGov. This creates limitations and requires manual routing for daily inspections, hurricane response, etc.	Initiate use of GIS tools available in the EnerGov Code Enforcement module. Coordinate with Information Technology / City GIS consultant on GIS records to establish georules in EnerGov.	Use of spatial rules in EnerGov will allow for more efficient routing of inspectors and save staff time spent on manual routing. This will be particularly useful during disaster response efforts.
5c	Technology	EnerGov does not manually calculate the enforcement dates required by ordinance. Staff are manually calculating and entering compliance dates, creating additional work.	Establish rules in EnerGov to automatically calculate dates in accordance with code regulations.	Automating date calculations will reduce potential errors and save staff time.
5d	Technology	Common violations arise from annual inspections across the City. There are several processes such as Fire inspections, grease trap inspections, etc. that could benefit from system/process enhancements.	Consider opportunities to build out annual inspection tools in EnerGov for various annual processes. Utilize tools to automate annual inspection requests. Further, integrations with other review systems (such as Mobil Eyes) may prove useful in tracking information.	Use of additional tools to track annual inspections and automations to notify the public will improve overall compliance in the City and reduce overall staff effort.

6. Land Development Review Processes – Engineering and Utilities

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
6a	Technology	Several engineering processes are not currently tracked or managed in EnerGov. These include stormwater basin reviews and grease trap inspections. These processes are managed in other systems, which reduces overall efficiency.	Consider opportunity to bring additional engineering review process into EnerGov and built out relevant documentation / SOPs. Assign an engineering point of contact to work with the technical team on changes to incorporate both business and technical expertise in the decision-making and change process.	Use of EnerGov to manage these processes will enable better management of these processes and eliminate additional systems of record that may be tracking similar information.
6b	Technology	EnerGov does not contain utility information available in the City’s GIS records. This is a major point of opportunity to improve relevant data available to reviewers in the system of record.	Explore the opportunity to make GIS Utility records available in EnerGov.	Access to utility records directly in EnerGov will create a more streamlined review process as reviewers will not need to access multiple sources of information to complete their reviews.
6c	Data / Metrics	There is limited data-driven decision making occurring for engineering / environmental reviews. Limited ability to track KPIs such as time-tracking for reviews creates limited understanding of staff effort required to complete major processes.	Determine useful data and metrics desired and built out reports and/or dashboard features in EnerGov to collect this information.	Use of data for daily practices, including staff and workload assignments, will help better manage major processes and determine average level of effort for common tasks.

7. Planning / Zoning - General

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
7a	Customer Service	Planning staff aim to respond to customer inquiries within one hour of initial contact. While this is positive, there are several points of contact and options to contact Growth Management. Staff time is often spent responding to applicant inquiries that have already been directed to other staff. Challenges arise from constituents “answer shopping” to receive multiple responses and independently confirm information received is the same.	Consider using a decision support / development guide tool to streamline customer requests for information and track valuable metrics. There are several products available in the marketplace supporting project specific question and answer process. These tools can be used to track interest in the types of applications necessary for a specific project eliminating misinterpretation multiple responses or answer shopping. Additionally, these can be used as a project-specific guide for applicants to determine the specific applications necessary for completion.	<p>These products can be configured to support requests for high-volume, low complexity requests typically fielded by a customer service support role and can allow delegation of questions to the lowest level feasible.</p> <ul style="list-style-type: none"> • Peer jurisdictions receive a 30% reduction in support calls. • Consistent information is being distributed to each resident based on their unique needs and zoning conditions. • Enable applicants to gather their information on their own time (weekends, after-hours, etc.). • Utilize the City's GIS layers to automatically identify additional steps or restrictions based on the location of the permit. • Increase customer compliance by using consistent information to

7. Planning / Zoning - General

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
				determine applicable standards.
7b	Staffing	There are limited backups for major planning processes. Staff appear to be adequately cross-trained to complete planning tasks outside of their direct roles and responsibilities. However, there is only one point of contact for several division functions and limited staffing to fill in as a back-up when assigned staff are out of the office.	Implement mechanisms to track efforts and use data/metrics to inform staffing. Evaluate efforts to workload balance using insights available in EnerGov dashboard and reports. Consider options to delegate work (ex. Pre-application meetings, questions) to the lowest level possible and evaluate options to increase staff that can perform these functions based on demonstrated need / analysis of workload data.	Staffing according to data will help to better balance workload and assign work based on volume. Delegating work to the lowest level feasible will eliminate customer expectations for “answer shopping.”

8. Planning / Zoning – Planning Intake

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
8a	Pre-Application Process	Pre-application inquiries are received from multiple sources. These include phone, walk-ins, email (GMHelp), Spiceworks, and direction from the City Manager/City Council. A significant number of inquiries are routed directly from City Administration.	Determine level of service desired from City administration. Consider use of EnerGov portal to route specific requests and involve potential reviewers in pre-application discussions. Evaluate willingness of administration to route major requests to the portal and provide public training and messaging on these tools.	Streamlining the process to receive inquiries or pre-application requests for new development will create a more consistent and determinable customer service experience.
8b	Pre-Application Process	Planning pre-application meetings are optional. The process for scheduling a pre-application meeting is very informal	Consider a process to formalize scheduling of pre-application meetings by routing through an administrative staff member	Standardizing the process to schedule pre-application meetings will help manage applicant expectations and

8. Planning / Zoning – Planning Intake

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		with no meeting agenda. Challenges arise when applicants do not provide site plans or documentation in advance of a scheduled pre-application meeting, creating an inefficient use of time for staff administering the meeting. The City may not have the necessary disciplines present to answer questions. Results of pre-application meetings are not documented.	and requiring submission of plans prior to staff scheduling the meeting. Use agendas and document discussion regarding the main points and takeaways from each pre-application meeting and date within EnerGov. Involve the necessary disciplines to provide an opportunity for applicants to engage early in the process. This will familiarize them with the tools and resources available to them to successfully submit their application.	reduce requests for meetings with the intent of “answer shopping” for information. Documenting the main points of meeting will create a record of meetings held and information presented. Pre-application meetings can be used to identify improvement opportunities so the City can understand and be responsive to addressing applicant needs.
8c	Application Process	Planning staff currently use a manual checklist to verify application sufficiency, leaving room for errors as applicants frequently do not complete the checklist in entirety.	Utilize forms tools in EnerGov to receive planning applications. Require customers to submit all relevant information by application type prior to submittal.	Automating planning application sufficiency checks will save significant staff time and can allow for planning staff time to be allocated to other tasks.
8d	Application Process	Payment view in EnerGov does not show the association to the planning and building cases. They must manually associate the fees paid with the planning cases in EnerGov.	Evaluate the use of EnerGov’s Project feature allowing for the grouping of planning cases and permits. The fees associated with these activities can be grouped to determine fees paid, due, and identify fees that may be due later in the process.	Large development projects may have extensive conditions, performance guarantees with fees, and other conditions to be satisfied throughout the application/permit lifecycle. Making these conditions transparent to staff and customers will promote greater compliance.

9. Planning / Zoning – Review Processes

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
9a	Review Process	Site development plan applications and building permits may run concurrently. This is not best practice as it leaves room for error and may result in duplication of submission materials or reviews.	Require formal site development plan approval for applicants prior to building permit submittal.	Requiring SDP approval prior to building permit submittal will eliminate potential error and work effort duplication from running reviews concurrently.
9b	Review Process	Some applications require a legal review. This is currently occurring outside EnerGov. Staff manually sent all documentation to an attorney via email.	Establish visibility into relevant application materials in EnerGov for the City’s legal reviewers. Create a review stop in EnerGov for legal reviews to track legal approvals and notes directly related to the case.	Allowing access to materials in the system of record will create overall process transparency and eliminate manual effort. Additionally, it will capture legal commentary that may be relevant in the future.
9c	Review Conditions	The process to track conditions of approval could be further defined. Currently, personnel changes and lack of internal knowledge on specific project may cause conditions of approval to be missed.	Develop a standard process and document via process map for conditions of approval. Delegate process ownership to specific staff who will hold responsibility in tracking and maintaining conditions of approval in the EnerGov system.	Identifying process ownership will be key in future management of conditions of approval. Training staff to manage and track these in EnerGov will lead to more consistent management that leaves less room for effort with staff changes and elapsed time.
9d	Boards / Hearings	The City does not currently have an internal review board, often referred to as a Development Review Committee or Plans Review Committee. This is a standard practice among many planning departments in Florida.	Consider establishing an informal review board where staff from all review disciplines meet at a scheduled time with applicants. Prepare an agenda for each meeting and document results in EnerGov.	While this requires staff time to coordinate and attend, this process overall allows the applicant opportunities to ask questions of all reviewers in one forum. Ultimately, this will reduce the current practice of “answer shopping” and documented applicant and

9. Planning / Zoning – Review Processes

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
				staff challenges of meetings requests with separate reviewers.
9e	Boards / Hearings	Staff receive complaints regarding the cumbersome nature of the public notice.	Outside of public notice required by State statute, consider opportunities to modify the City Code requirements for advertisements through text amendment. Consider options utilized by other communities such as reducing the requirement for certified mail, use of standard postcards, and using smaller signs (similar to a political yard sign) for property and hearing details.	If policymakers are comfortable reviewing a text change proposed to loosen public notice requirements within the City’s purview, this is a simple way to lighten the load of the public hearing process.
9f	Boards / Hearings	Staff manually move documentation between EnerGov and Granicus for boards and hearings.	Consider feasibility of an integration between Granicus and EnerGov for seamless movement of documentation between systems for relevant meetings.	This integration will allow staff to directly transfer necessary information between systems and reduce manual effort to download documents and re-upload in a new system.
9g	Appeals	Staff reported misaligned Code requirements for appeals. This creates challenges interpreting and enforcing the Code.	Complete a text change process to better align and define Code requirements for Appeals.	Code clean-up will improve staff’s overall enforcement of the Code requirements and eliminate necessity of interpretation.

10. Planning / Zoning - Commercial Land Use and Zoning Certificate Process

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
10a	Policy	Staff appeared to have an understanding of the current Commercial Land Use (CLU) provisions in the City’s Municipal Code. However, code application is creating challenges for staff. Further, It appears there is not a clear and consistent policy for enforcement of non-compliance from the CLU provisions in the Code. This creates challenges for staff in application of the code when there is not a clear means to enforce a violation.	<p>In order for staff to best interpret and implement the direction of City policymakers, it is recommended to hold workshop(s) to guide the City’s policy direction on the CLU process.</p> <p>Topics recommended include:</p> <ul style="list-style-type: none"> ➤ Policymakers’ goals/objectives in regulating commercial land use ➤ Policymakers’ opinions on compliance with existing code versus ease of opening a business ➤ Direction on parking regulations, including if Code changes are desired to reduce parking for redevelopment of existing structures to promote new business ➤ Length of time allowed between closure of existing businesses and opening of new ones and if any “grandfathering” period should be permitted ➤ If municipal code changes are desired to modify the existing process ➤ Discussion of the Code Enforcement policy direction for violations of current/future Codes 	<ul style="list-style-type: none"> ➤ Business transfers of ownership for maintaining pre-existing business uses of same magnitude should not result in denials of property use. ➤ Avoid enforcement of different standards for new businesses versus existing commercial property owners.

10. Planning / Zoning - Commercial Land Use and Zoning Certificate Process

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
10b	Policy	Major challenges include businesses going through the application process and not being able to comply with Code requirements. Several applications were reported to be in a “pending” status that remains unresolved. Staff reported that variance requests are uncommon for properties seeking a Commercial Land Use (CLU) / Zoning Certificate that do not comply with land development regulations.	See recommendations above related to seeking policy direction. Complete an impact analysis and relevant City Code revisions to align the City’s Ordinances to the City’s desired policy direction. Consider alternatives such as administrative variances for items that are creating major roadblocks in complying (ex. Parking).	Seeking direction from policymakers on future enforcement and remedies from non-compliance, which might typically include a variance request, will guide staff in their presentation of relevant City Code change recommendations and ensure the application of the City’s rules align with leadership’s intent.
10c	Technology	Some reviewers noted that the configuration of Commercial Land Use (CLU) review processes is set up differently than Building review processes. While it was understood that some configuration differences will apply, staff reported they believe there is room for improvement to make these processes align better.	Revisit and reconfigure the EnerGov configuration of current-state workflows supporting the CLU review process based upon the current-state process diagramed in Appendix G.	The City’s CLU review process involves reviewers spanning five review disciplines. The capture of information from each review discipline may trigger additional fees to be collected. These invoices are currently emailed where they could be generated through the portal.
10d	Application Process	The current CLU and Zoning Certificate application requires updates. Further, language should be clarified to best explain the process and terminology to applicants.	Evaluate the most frequent reasons for denying CLU applications by each departmental review discipline. Determine if these denials result in the customer having no or limited options of achieving compliance. Report to Council	The CLU process is often recognized as a barrier for business owners who want to conduct business in the community. The complexity of the process creates frequent calls for escalation to City leadership and officials who step into the process on behalf of staff.

10. Planning / Zoning - Commercial Land Use and Zoning Certificate Process

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
			on the reasons for these denials to determine alternative policy options.	
10e	Application Process	Reviewers from various disciplines indicated they often have to request additional information from the applicant after receipt of application materials. Lack of needed information being requested at the front end of the process creates additional effort.	The use of an online, decision-support guide has been effectively used by peer communities to inform customers of required submission elements to eliminate resubmissions. Prompt the customer to complete step-by-step questions to identify the applicable conditions using an automated tool will promote process understanding.	Creating a consistent process that anticipates the customer’s needs for their application submission on the first attempt will expedite the review process for both the customer and staff, lead to fewer exceptions, increase voluntary compliance, and promote consistent enforcement of standards.
10f	Enforcement	Identifying when uses have changed is a challenge for staff. Specifically, this is a challenge for redevelopment or business occupying existing structures. Often, staff learn of new uses after they have opened and begun operating.	Policy considerations for identifying uses include the addition of staff/resources to manage identification of new business. There are several options for more closely monitoring uses, including implementation of a yearly Business Tax Receipt process and staff or introduction of a Code Enforcement team member to monitor uses. Alternatively, the City could introduce an economic development team member or Customer Success Team that assists new businesses with this process.	The CLU process is often recognized as a barrier for business owners who want to conduct business in the community. The consistent enforcement of standards elevates public trust in the process.

11. Special Events

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
11a	Technology	The special event process is being managed across multiple systems. EnerGov is being used primarily as a file repository to store documents related to the application and communication on the process after reviews are completed through email. Excel is being used to track deadlines and reviews through the process. The use of shadow systems to complete reviews, inspections, routing, and management, leaves room for potential errors and requires additional oversight from reviewers. The use of outside systems is inconsistent with how other similar view / inspection processes are managed in EnerGov.	Develop plan of action to migrate all special event applications to EnerGov and eliminate use of Excel for project management. Work with the assigned System Administrator to submit change requests and make modifications in the system to adequately manage the desired process and required steps.	While transitioning special event processes to EnerGov fully will require education and training, several benefits will be realized, including easier management of project deadlines, online applications through the EnerGov portal, public access into approved special events through EnerGov’s online search tools, insight into data/metrics, coordinated inspections and use of iGEnforce, improved inspector scheduling and management. Some reviewers indicated a lack of visibility into project status, which can also be resolved through managing projects in EnerGov and providing access to all relevant reviewers/Departments.
11b	Technology	Applicants submit PDF applications for special event via email sent directly to the process owner, creating a potential gap in services if the assigned individual is out of office.	Configure system to allow special event applicants the ability to submit and manage applications in the EnerGov portal. Manage applications online to allow multiple staff (including an assigned backup) access to all submittals.	Submission in the EnerGov portal will reduce required emails, ensure continuity of services, and reduce the manual entry of project details.
11c	Review Process	Applicants typically submit applications 14 days in advance of the desired special event (may be greater).	Assess the City’s desired level of service to complete special event reviews over other City services. If the desire is to maintain an	Establishing a greater review period (e.g., 30 days) will allow more adequate staff resource allocation,

11. Special Events

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		Due to the fixed nature of the event date, this may necessitate reviewers complete reviews in a much more fixed time-frame that other review types across the City.	expedited turnaround time for events and maintain the same level of review, consider additional staff assigned to process reviews. Alternatively, consider a fixed submission deadline that is greater than 14 days for reviewers to complete the entire special events process.	scheduling, and time management to process applications requiring multiple rounds of review and complete necessary inspections. As many events requiring Fire or Police representation may occur on weekends, this allows more adequate time to schedule staff to event posts (greater than one pay period).
11d	Review Process	Planning and Zoning staff have limited or informal involvement in the special review process, creating potential gaps in the application of the Zoning / Land Development Code.	Establish Planning and Zoning as a special event reviewer. Evaluate Complete recommend changes to migrate reviews to EnerGov. Allow assigned reviewers to approve/disapprove in the EnerGov system.	Offering Planning and Zoning the formal opportunity to comment on special event applications will ensure continuity of application of the zoning code and allowable uses.
11e	Review Process	There appears to be some misalignment over when special events are required by Code and the requirements that special event permit approvals may negate. Staff do not feel there is adequate information in the code to determine some requirements.	Complete a review of the Municipal Code for references to special events. Consider addition of language containing specific details on what a special event permit may permit, or if a special event permit may temporarily allow activities or uses that are in conflict with the code (e.g., exceeding the noise ordinance, temporary use of sites for uses not permitted by zoning, etc.).	Providing clarification on policy will overall improve the process and lead to more consistent reviews. This will create a more consistent and predictable special events process for applicants and constituents.
11f	Policy	Additionally, staff overwhelmingly believed the policy direction regarding special events was to increase the amount of special events in the City.	Document level of effort to staff special events as they occur. When making staffing decisions, utilize these metrics in review processes.	Understanding the level of effort will be essential in determining the City's

11. Special Events

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		This may create additional resource needs and require additional management of resources on site (e.g., crowd management, Fire representatives, Police officer presence, maintenance staff for public properties) and off-site (e.g., complaint management, application processing and review).	Frequently coordinate on the review process for events across review disciplines. Consider availability of staff resources in approval of events.	desired level of service for special events and staffing accordingly. Reviewing City staff availability as a mechanism of the current review process will ensure appropriate resources are available and mitigate potential safety concerns due to lack of public safety presence.
11g	Fees	Fees are assessed by various reviewers separately throughout the process. While a fee is assessed in EnerGov for the initial application, other reviewers may invoice and assess fees outside of EnerGov. This creates confusion in the overall process.	Develop a strategy to manage, assign, and pay all fees from all reviewers within EnerGov.	Managing all fees from EnerGov will ensure continuity of service and create consistent and clear expectations for customers.
11h	Fees	The described fee to apply for a special event does not appear to be consistent with the level of staff effort required to manage and administer the review process.	Consider formally assessing the special event fee to determine the level of effort required to process a special event application.	Further review of the special event process fees may lead to better alignment with staff level of effort to complete requests.

12. Other Observations

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
12a	Addressing	The City GIS consultant is responsible for addressing assignment. There is limited understanding among City staff regarding how addresses are requested / assigned. This creates some missed requests that necessitate assigning addresses later in the development process than is typical.	Consider mapping address assignment processes and developing / documenting standard procedures. Establish a mechanism to note than the specific address was assigned and documentation provided to relevant stakeholders in EnerGov.	Development and documentation of a standard addressing process will create a greater understanding and appreciation of address assignment across City staff.
12b	EnerGov Support / Management	EnerGov support requests are currently being sent via email. There is not currently a method to track these requests.	Request Tyler to provide access to their CRM ticketing system to have real-time visibility into all open support requests so they are transparent to the entire organization – not just those who are most experienced with the product.	Tracking EnerGov support requests will provide insight into the level of effort in providing this internal service. It will also represent areas where City training should be focused should support requests be used in lieu of staff properly being trained.
12c	Documented Level of Effort	Among all divisions, there are opportunities to document level of effort. Lack of documentation doesn't adequately allow leadership to determine level of effort associated with many common tasks.	Establish opportunities to track frequent interactions with customers. Examples include pre-application meetings, meetings about specific projects, phone calls, etc.	Establishing a process to track level of effort will allow staff to substantiate the workload and effort required to complete common tasks and allow leadership to better appreciate the level of effort.
12d	Inter-Departmental Coordination	There are some areas where inter-departmental coordination can be improved. Specifically, items arose where there was lack of clarity or	Consider opportunity to host an annual "Review Process Roundtable" to educate and train staff on the review process. Use this opportunity to inform and remind staff of changes, learn about pain-points from outside	Improving coordination across all departments will increase staff ownership of their assigned role in

12. Other Observations

#	Subject Area	Observations	Plan of Action (What/How/When)	Benefits Explained (Why)
		coordination throughout the review process for building and planning.	reviewers, and institute process improvement initiatives. Further, development of an internal review board will create a standard touchpoint and increase coordination among reviewers on specific projects.	the review process and create a consistent experience for staff.

Appendix C – Survey Responses

As a part of the analysis of land management processes, staff and public stakeholders were asked a series of survey questions. These questions included open-ended feedback and fixed-response questions to understand participants' level of agreement with statements regarding the City's land management processes.

Survey results included feedback from the following:

4	Stakeholders from Executive Leadership
7	External Customers
21	Subject Matter Experts from the following focus areas: Code Enforcement Community Affairs – Building Community Affairs - Growth Management Community Affairs - Parks & Recreation Finance Fire Department Fleet and Facilities Information Technology Public Works Utilities

Results of surveys have been organized below by implementation action plan focus area to provide insight into considerations for each area.

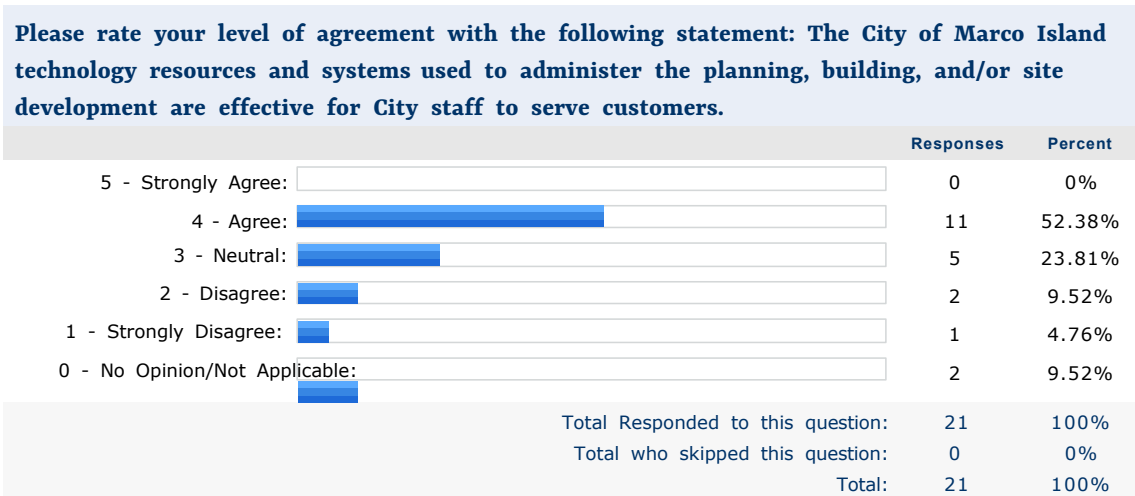
A. Recognize and Fulfill Customer Commitments

- ❖ The following were identified as common **improvement requests** received by staff:
 - Clarification on processes (including site development and building permitting processes)
 - Status tracking, including easier access to review comments and/or inspection results
 - Staff responsiveness and application turn-around time
 - Clarification on who to contact for questions on process requirements
 - Better tools to understand land management processes
 - Requests for in-person contact/customer service
 - Simpler payment processes
- ❖ When asked an open-ended question regarding **what tools are used to communicate steps in the process to customers**, several staff mentioned they type out written details or steps via email. Many staff indicated this is a weak area with room for improvement.

- ❖ City staff identified the following as **common customer obstacles**:
 - Lack of understanding of City’s online portal
 - Limited understanding of City’s submission requirements
 - Unsure of who to contact with questions
 - Coordination between building and planning on key processes, such as site development plans
 - Lack of “first pass success” for submissions
 - Access to staff for questions, varying direction from different reviewers/staff members
- ❖ External stakeholders identified the following as **common customer obstacles**:
 - Commercial land-use processes and non-conforming commercial properties
 - Response time for some FEMA and Planning questions
- ❖ **50%** of external customers indicated they feel their **phone messages or emails are returned** in a reasonable amount of time.
- ❖ **50%** of external customers stated they **would pay a higher fee** for increased customer service levels.

B. Promote Continuous Improvement in Technology

- ❖ **52%** of City staff responded “Agree” when asked if the City **uses effective technology resources** to administer the land development process. No staff responded “Strongly Agree.”



- ❖ Staff identified the following **common technology pain points**:
 - Incorrect routing of reviews, creating process confusion
 - Separate processes in EnerGov for various review types
 - Confusion regarding portal registration

- ❖ **57%** of City staff believe the technology tools available to them are easy to learn or use.

C. Leverage Automations for Elevated Service

- ❖ When asked about reports for reviewing performance, several staff were **unsure of how to access or utilize reporting tools**.
- ❖ When asked about tools used to communicate process understanding/steps to the public, no City staff member mentioned using **automations or automated tools**.
- ❖ Several external stakeholders noted a desire for access to historical information / real-time information.

Please rate your level of agreement with the following statement: **The City's online resources save time in not having to call or email City staff to receive status information.**

	Responses	Percent
5 - Strongly Agree:	0	0%
4 - Agree:	2	33.33%
3 - Neutral:	3	50%
2 - Disagree:	0	0%
1 - Strongly Disagree:	0	0%
0 - No Opinion/Not Applicable:	1	16.67%
Total Responded to this question:		6 85.71%
Total who skipped this question:		1 14.29%
Total:		7 100%

D. Streamline Processes for Consistency

- ❖ **86%** of City staff responded “Agree” or “Strongly Agree” when asked if the City welcomes ideas to **improve the planning, building, and/or site development processes from its staff**
- ❖ **48%** of City staff responded “Agree” or “Strongly Agree” when asked if the City uses **effective resources and tools to train staff** to understand how the planning, building, and/or site development process is managed.
- ❖ When asked about **exceptions to standard processes**, most staff indicated that the main causes for exceptions were related to life safety or emergency response.

E. Manage Performance throughout Activity Lifecycles

- ❖ City staff were asked to select the main ways customer feedback is received. Respondents overwhelmingly **noted the emails and calls** are the most frequent way **customer satisfaction feedback** is received. Review *Appendix D – Customer Satisfaction Survey Example* as an example of a formalized mechanism to receive feedback.
- ❖ Under half of subject matter experts surveyed believed the City shares relevant data with the public on land management processes.

The City of Marco Island represents relevant data to the public regarding its management of the planning, building, and/or site development review/permitting process.

	Responses	Percent
5 - Strongly Agree:	0	0%
4 - Agree:	10	47.62%
3 - Neutral:	5	23.81%
2 - Disagree:	1	4.76%
1 - Strongly Disagree:	2	9.52%
0 - No Opinion/Not Applicable:	3	14.29%
Total Responded to this question:		21 100%
Total who skipped this question:		0 0%
Total:		21 100%






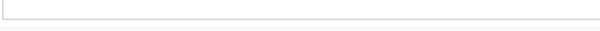
F. Pathways for Staff Development and Succession

- ❖ When asked about their tenure at the City, out of 21 subject matter experts, 19 indicated they have worked in their current role their entire tenure at the City.

Please indicate the number of years you have worked at the City:

	Responses	Percent
0-1:	4	19.05%
2-5:	8	38.1%
5-10:	4	19.05%
11-15:	2	9.52%
16+:	3	14.29%
N/A:	0	0%
Total Responded to this question:		21 100%
Total who skipped this question:		0 0%
Total:		21 100%

Please indicate the number of years you have worked in your current job role:

	Responses	Percent
0-1: 	4	19.05%
2-5: 	7	33.33%
5-10: 	5	23.81%
11-15: 	2	9.52%
16+: 	3	14.29%
N/A: 	0	0%
Total Responded to this question:		21 100%
Total who skipped this question:		0 0%
Total:		21 100%

- ❖ When asked about resources to train new staff, City staff appeared unclear on training resources and tools available. Many staff indicated they received or provided training via Microsoft Teams.

G. Provide Ongoing Educational Outreach for Customers

- ❖ **57%** of City staff responded “Agree” or “Strongly Agree” when asked if the City **welcomes ideas to improve the planning, building, and/or site development processes from its customers.**
- ❖ 57% of City staff responded “Agree” or “Strongly Agree” when asked if the City **acts upon ideas to improve the planning, building, and/or site development processes from its customers.**
- ❖ When asked about **customer obstacles**, many **staff members** felt that understanding of how to use the portal was creating challenges or reluctance among customers.
- ❖ When asked about **customer obstacles**, several **external stakeholders** noted challenges with unfamiliar technology terminology and navigating the portal submission process.
- ❖ **External stakeholders** indicated the following related to using **online resources**:

Please rate your level of agreement with the following statement: The City of Marco Island provides sufficient training and support for the public to learn how to use its online resources.

	Responses	Percent
5 - Strongly Agree:	0	0%
4 - Agree:	1	16.67%
3 - Neutral:	2	33.33%
2 - Disagree:	1	16.67%
1 - Strongly Disagree:	1	16.67%
0 - No Opinion/Not Applicable:	1	16.67%
Total Responded to this question:		6 85.71%
Total who skipped this question:		1 14.29%
Total:		7 100%

Appendix D – Customer Satisfaction Survey Example

1. I'm completing this survey about my experience with the following services:

	Building Permitting		Growth Management Application Submission / Preliminary Review
	Building Plan Review		Growth Management Site Development Plan Review
	Building Inspection		Payment Submission
	Contractor Licensing / Verification		FEMA Community Rating System
	Code Enforcement		Planning Commission / Zoning Board of Appeals
	Environmental Review		Tree / Landscaping Review

2. Overall Rating of Service Received

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied

3. City staff informed me about the process and timelines regarding my project:

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

4. City staff coordinated my application/information between each other to ensure my project went smoothly through the process:

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

5. City staff provided me complete and consistent answers regarding my project:

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

6. City staff responded to me in a timely manner (e.g., emails and phones calls returned within 24 hours):

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

7. City staff made themselves available to me and responded to questions/concerns regarding my project:

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

8. City staff provided alternatives or suggestions to me that were helpful in moving my project forward:

	Very Satisfied
	Somewhat Satisfied
	Somewhat Dissatisfied
	Very Dissatisfied
	Doesn't Apply

9. City staff:

	Exceeded my expectations
	Met my expectations
	Did not meet my expectations
	Doesn't Apply

10. May we contact you regarding this survey to help improve our services?

	Yes
	No

11. Would you be interested in participating in a focus group facilitated by an external third-party to improve the City's development review business processes?

	Yes
	No
	Would like additional information

12. Name of the City employees who assisted you?

{Open Form}

13. Please provide your contact email if you would like us to reach out to you.

{Email}
{Phone}
{Address}

14. What was the main type of building permit application that you most recently applied for?

	Residential Addition
	Residential Alteration
	Residential New Construction
	Commercial Addition
	Commercial Alteration
	Commercial New Construction

15. Over the past 12 months, how many times did you submit a new building permit application to the City?

	1 time Only
	2-5 times
	6-10 times
	More than 10 times

16. Which of the following best describes your role when applying for your most recent permit from the City? Please select the one most closely resembling the role if not specifically listed.

	Agent		General Contractor or Subcontractor
	Architect, Engineer, or Design Professional		Permit Processor, Expeditor, Runner
	Business Owner		Project Representative
	Commercial Property Owner		Residential Property Owner
	Commercial Property Tenant		Residential Tenant
	For Profit Developer or Contractor		

17. When you were preparing your building permit application materials, were you able to locate the information you needed on the City’s website?

	Yes – Located the information on the website and was efficient
	Yes – Somewhat located the information but not efficient
	Partially – Found some of the information but not everything
	No – I did not find the information I needed on the website
	Not Applicable – I did not look for information on the website

18. Was the information you located on the City’s website helpful to complete your building permit application?

	Yes – Very helpful
	It was somewhat helpful
	No – it was not helpful
	Not applicable – I did not look for information on the website

19. As you prepared your building permit application, did you reach out to City staff for information or assistance?

	Yes
	No
	Tried to reach staff but was unsuccessful in contacting them

20. Please identify the ways you attempted to contact City staff and identify your level of satisfaction:

	I called a City staff member		Satisfaction Very Satisfied Somewhat Satisfied Neutral – No Opinion Somewhat Dissatisfied Very Dissatisfied
	I sent an email to a City staff person		Very Satisfied Somewhat Satisfied Neutral – No Opinion Somewhat Dissatisfied Very Dissatisfied
	I had an onsite appointment		Very Satisfied Somewhat Satisfied Neutral – No Opinion Somewhat Dissatisfied Very Dissatisfied
	I had an job site inspection		Very Satisfied Somewhat Satisfied Neutral – No Opinion Somewhat Dissatisfied Very Dissatisfied

21. What is the typical timeliness of a City staff member providing you a response when you contacted them?

	Same day (< 8 hours)
	Next business day
	Within 2-5 business days
	After 5 business days
	I did not receive a response
	Not applicable

22. If you did not reach out to the City for information or assistance, please explain why (please select all that apply)?

	I did not know how to contact the City
	I did not know who to contact at the City
	I did not know I had the option to contact the City
	I did not need assistance
	I did not have time
	I did not expect to receive the help I needed

Appendix E – Sample Performance Measures

Performance Measures and KPIs of the City’s Peer Regulatory Agencies

Performance measures and key performance indicators (KPIs) are crucial for increasing efficiencies and effectiveness of business processes within the City. Through measuring outcomes, organizations can identify areas for, and pursue, improvements. In the absence of such measurements, organizations cannot gauge their performance objectively and this results in other less accurate measures like perception driving the City’s reputation as a high quality, professional agency committed to protecting its citizens. The City of Port St. Lucie, Florida offers an excellent model through its Organization Performance Management Program that illustrates these practices.

Since organizations and people tend to manage what they measure, the use of performance measures enables organizations to represent its current-state and identify options to achieve a desired future state. This provides a planning tool for identifying continuous improvement and objectively measure progress toward achieving actual improvement.

Figure D-1 shows a hierarchy for determining indicators to measure. This hierarchy, referred to as a cascading system in a performance management framework, aligns community needs with staff performance measures.

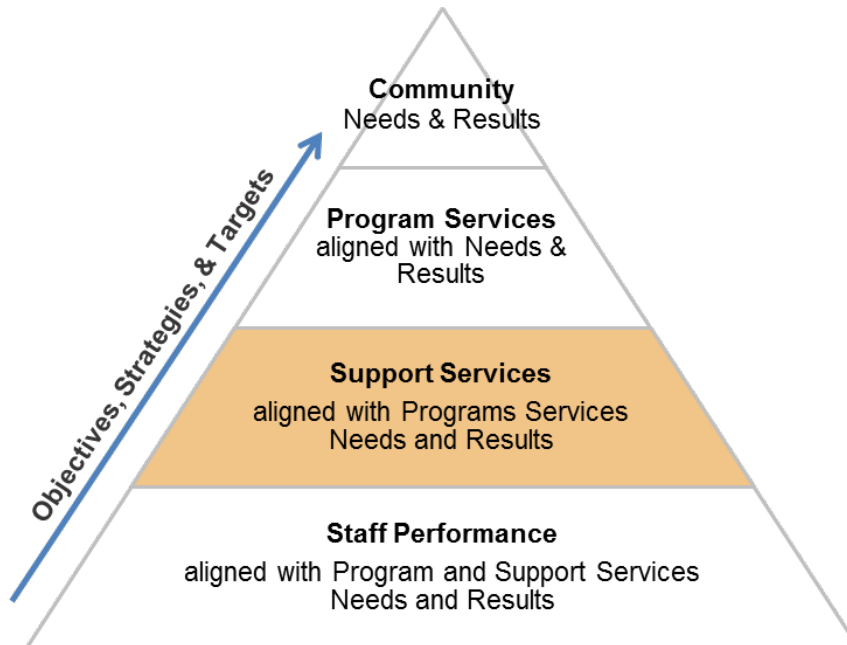


Figure D-1- Hierarchy for determining indicators to measure

Priorities and objectives are set through a planning process along with high-level performance measures and targets. Strategies for achieving the objectives are then set through a strategic planning or budget processes. Program, service, or organizational unit objectives and measures are also developed that align with overarching objectives and strategies. Business unit performance objectives, strategies, and measures may also be part of a cascading system.

Tables E-1 and E-2 represent examples of measures from peer organizations reported on a regular basis (typically monthly) by communities throughout the United States. References to items with a blue/underline format, contain hyperlinks to external resources from various communities cited. Permitting for both vertical (building) and horizontal (utilities) are captured by communities with approving new utility (water, sewer, and storm water) connections.

Table E-1: Examples of Peer Community Performance Measures		
Community Name	Source of Measures	Source Location
City of Port St. Lucie, FL	<u>City Building Department Web Site</u>	<u>City Building Department Strategic FY21-26 Operations Plan</u>
City of Woodbury, MN	<u>City Performance Measures Dashboard</u>	<u>Planning, Code Enforcement, Housing & Economic Development Inspections</u>
City of Tampa, FL	City Performance Measurement Dashboard	<u>City Performance Measurement Dashboard</u>
City of Sunnyvale, CA	City Annual Budget – Community Development Department (pg. 393).	<u>City Adopted FY21-22 Budget and Resource Allocation Plan</u>
City of West Palm Beach, FL	City of West Palm Beach’s Quality Control Manual, Published by Building Division of Development Services	Internal Operations Document
City of Austin, TX	City Success Metrics for the City’s Development Services Department	<u>City Success Metrics Dashboard</u>



Examples of Customer Success Outcomes



Inputs	Outputs	Outcomes
Number of new construction commercial plan review applications received	Number of plan reviews completed by discipline per month	% completed in 21 days (cycle #1) % completed in 14 days (cycle #2) % completed in 7 days (cycle #3)
Number of express permit applications received	Number of express permit applications issue same day	% of express applications issued same day of total applications
Inspection requests received	Daily inspections completed per inspector	% of inspections completed as scheduled
Number of walk-in customers	Average waiting time per customer	% customers served with wait times less than 15 minutes



Examples of Customer Success Outcomes

Inputs	Outputs	Outcomes
Applications received	Completed applications processed	% Applications complete on first pass
Total Scheduled Staff FTEs	Average # of staff available per day	% of scheduled days where total available staff capacity > 90%
Number of inspection calls received	# of inspections performed	% of total inspections scheduled for next business day within 24 hours of request
Number of e-plan submissions received	# of e-plan review submissions completed upon initial submission	% of first pass e-plan submission acceptance > 80%
Applications received at intake	Number of applications processed and routed same day by intake	% of total applications routed same day > 90%

City of Port St. Lucie FL – Building Department – Fourth Quarter 2023 Statistics

Permit Type	Com / Res	Permit #	Applied through Web/Paper/ Email	Date Applied or Received	If package not completed, date complete package was received.	Date sent to PR (Permitting to PR)	Days in Permitting	Rev 1 Out	Rev 1 In	Rev 2 Out	Rev 2 In	Rev 3 Out	Rev 3 In	Days for Revision
RS - Single Family Residence	Res	2353778	Web	11/28/23		11/28/23	0	11/29/23	12/05/23					4
RS - Single Family Residence	Res	2354293	Web	12/01/23		12/04/23	1	12/11/23	12/11/23					
CI - Commercial Interior	Com	2322002	Web	05/11/23		05/15/23	2	05/31/23	06/21/23	06/28/23	08/16/23	08/22/23	10/04/23	81
CI - Commercial Interior	Com	2327651	Web	06/14/23	06/15/23	06/15/23	0	06/27/23	08/21/23	08/23/23	10/19/23			80
CI - Commercial Interior	Com	2329945	Web	06/28/23		06/30/23	2	07/19/23	08/09/23	08/30/23	09/29/23	10/02/23	10/09/23	42
CI - Commercial Interior	Com	2332144	Web	07/13/23	07/21/23	07/21/23	0	08/01/23	10/13/23					53
CI - Commercial Interior	Com	2332403	Web	07/14/23	07/17/23	07/17/23	0	07/28/23	09/11/23	09/15/23	09/25/23	09/28/23	10/03/23	40
CI - Commercial Interior	Com	2333915	Web	07/21/23	07/28/23	07/28/23	0	08/14/23	09/12/23	09/13/23	09/19/23	09/20/23	10/04/23	35
CI - Commercial Interior	Com	2334261	Web	07/24/23	08/30/23	08/30/23	0	09/18/23	09/20/23					2

Permit Type	Com / Res	Permit #	Days for Revision	Fire Dept out	Fire Dept in	Days waiting for Fire Dept	Date Plan Review to Permitting Final Processing	Days in Plan Review to first comments / or to Permits for final processing, minus fire review	Date Contractor Contacted - READY	Days for Final Processing from Permitting	Total Days - Applied to Ready
RS - Single Family Residence	Res	2353778	4				12/06/23	2	12/06/23	0	2
RS - Single Family Residence	Res	2354293					12/12/23	6	12/12/23	0	7
CI - Commercial Interior	Com	2322002	81	10/09/23	10/24/23	11	10/24/23	24	10/24/23	0	26
CI - Commercial Interior	Com	2327651	80	10/24/23	11/15/23	16	11/15/23	13	11/15/23	0	13
CI - Commercial Interior	Com	2329945	42	10/10/23	10/30/23		10/30/23	30	10/30/23	0	32
CI - Commercial Interior	Com	2332144	53	10/18/23	11/03/23		11/03/23	10	11/03/23	0	10
CI - Commercial Interior	Com	2332403	40	10/06/23	12/05/23		12/05/23	19	12/05/23	0	19
CI - Commercial Interior	Com	2333915	35	10/05/23	11/02/23		11/02/23	14	11/02/23	0	14
CI - Commercial Interior	Com	2334261	2	09/22/23	10/27/23		10/27/23	15	10/27/23	0	15

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Application Intake	Tampa	Online vs. In-Office Development Permit Applications	Monthly Total
Application Intake	Tampa	Payments Made Online vs. In Office (Yearly Total)	Yearly Total
Application Intake	Sunnyvale	Number of customers served at One-Stop Permit Center	FY Total compared to Target
Building	Centennial	Average Rapid Review Permit Processing Time	Average Minutes - Expected/Historical Average vs. Actual
Building	Centennial	Average Rapid Review Customer Wait Time	Average Minutes - Expected/Historical Average vs. Actual
Code Enforcement	Tampa	Complaint Response Time	Complaint Total / Average Response Days Compared to Goal, by Month
Code Enforcement	Tampa	Average Number of Days Cases Are Open	Monthly Average of Days, compared to goal (30 days) / Monthly total Cases closed
Code Enforcement	Tampa	Average Number of Days Cases Are Open	Avg. Days vs. Number of Cases Closed

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Code Enforcement	City of Virginia Beach	Average Response Time to Complaints	Days (2)
Building	City of Virginia Beach	Inspections per Work Day per Inspector	Average (based on 228 workdays) 17-23
Code Enforcement	West Palm Beach	% of complaints will be investigated within 24 hours after assignment	Goal 90%
Code Enforcement	West Palm Beach	% of initial investigation results entered into the Code Enforcement module within 24 hours after the investigation	Goal 100%
Code Enforcement	SafeBuilt	Gain voluntary compliance within 14 days of initial complaint	Goal 80%
Code Enforcement	SafeBuilt	Percent of complaining parties contacted within 1 business day of initial report	Annual %, Goal 95%
Code Enforcement	SafeBuilt	Number of proactive inspections	Monthly total, compared to goal (40)
Customer Service	Sunnyvale	Average time to answer customer phone calls	Average (seconds) compared to target (45 secs)
Customer Service	Sunnyvale	Number of customer survey respondents and percent rating the services provided at One-Stop Permit Center as good or better	Actual compared to goal (45/90%)

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Customer Service	SafeBuilt	Return 95% of phone calls/emails within 1 business day of receipt and 100% within 2 business days	Monthly %, compared to goal
Inspections	Woodbury	Total Number of Inspections	Total Number Expected/Historical vs. Actual
Inspections	Sunnyvale	Number of inspections scheduled and % completed as scheduled	Annual total and % completed
Inspections	Sunnyvale	Inspections requested for next business day and completed	Annual total and % completed
Inspections	West Palm Beach	Field inspections scheduled before 7 AM shall be completed by the end of the business day	Goal 98% on-time
Inspections	West Palm Beach	Accurate inspections without minor errors	Goal: conducted on at least 95% of commercial and residential projects
Inspections	West Palm Beach	Accurate inspections without major errors	Goal: conducted on at least 98% of commercial and residential projects
Plan Review	Tampa	New Construction Permit Average First Cycle Review Time	Average Number of Days compared to Goal

Table E-2: Peer Regulatory Agency Performance Measures

Process Type Category	Community	Type of Measure	Example of Measure
Plan Review	Tampa	Residential: Alteration Permit Average First Cycle Review Time by Fiscal Year	Number of days, Compared to Goal
Plan Review	Tampa	Commercial: Alterations Permit Average First Cycle Review Time	Monthly Average Compared to Goal
Plan Review	Tampa	Commercial: Alterations Permit Average First Cycle Review Time by Fiscal Year (Compared to Goal)	Yearly Average Compared to Goal
Plan Review	Sunnyvale	Number of staff decision Design Review applications submitted and percent receiving 1st set of staff comments in 14 or fewer calendar days.	Annual Total & %
Plan Review	Sunnyvale	Number of public hearing planning applications reviewed; and percent sent a letter within 21 calendar days stating completeness status.	Annual Total & %
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - New	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 15 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Additions	Working Days in Cycle (Cycle 1 - 15 days, Cycle 2 - 10 days, Cycle 3 - 5 days)

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Interior Alterations	Working Days in Cycle (Cycle 1 - 12 days, Cycle 2 - 8 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Pool/Spa	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 7 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Residential Building Plan Review - Accessory Structures Repairs - Maintenance Garage Conversions	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 5 days, Cycle 3 - 5 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - New	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 15 days, Cycle 3 - 10 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Additions	Working Days in Cycle (Cycle 1 - 20 days, Cycle 2 - 10 days, Cycle 3 - 10 days)
Plan Review	Sacramento	Cycle Times for Commercial Building Plan Review - Other Review (i.e., Canopy, Gazebo, Art Work, Playsets, Temporary Trailers)	Working Days in Cycle (Cycle 1 - 10 days, Cycle 2 - 5 days, Cycle 3 - 5 days)
Plan Review	Sunnyvale	Express permit applications reviewed on same day	Annual Total
Plan Review	Sunnyvale	Building plan checks received and completed within 21 days	Annual Total, % Completed

Table E-2: Peer Regulatory Agency Performance Measures			
Process Type Category	Community	Type of Measure	Example of Measure
Plan Review	West Palm Beach	Full plan review of large commercial projects within 30 days of submittal	80% Goal
Plan Review	West Palm Beach	Full plan review of new or larger residential projects within 14 days of submittal	80% on-time goal
Plan Review	West Palm Beach	Number of online and minor permit application submissions and percent reviewed same day	Annual Total, % Completed
Plan Review	West Palm Beach	Full plan review of commercial interior remodel projects of less than 5,000 square feet within 14 days of submittal	80% on-time goal
Plan Review	West Palm Beach	Full plan review of single trade projects, less than \$5,000 in value within 2 days of submittal	Annual Total
Plan Review	West Palm Beach	Accurate plan reviews without major errors	Goal at least 98% of major commercial and residential projects
Plan Review	West Palm Beach	Accurate plan reviews without minor errors on at least 95% of minor commercial and residential projects	Goal at least 95% of minor commercial and residential projects
Plan Review	West Palm Beach	Accurate plan reviews without life-safety errors	Goal at least 100% of commercial and residential projects

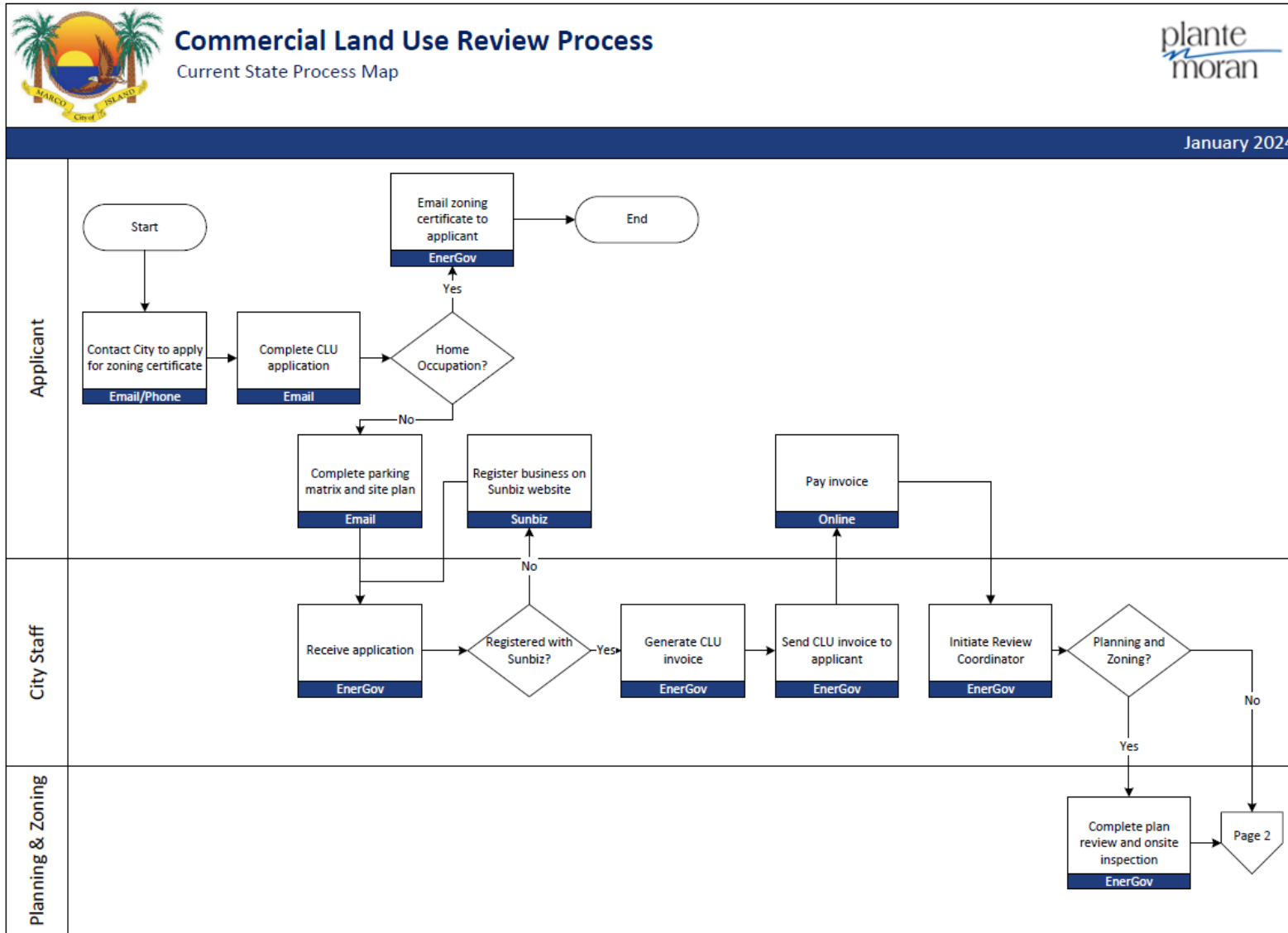
Table E-2: Peer Regulatory Agency Performance Measures

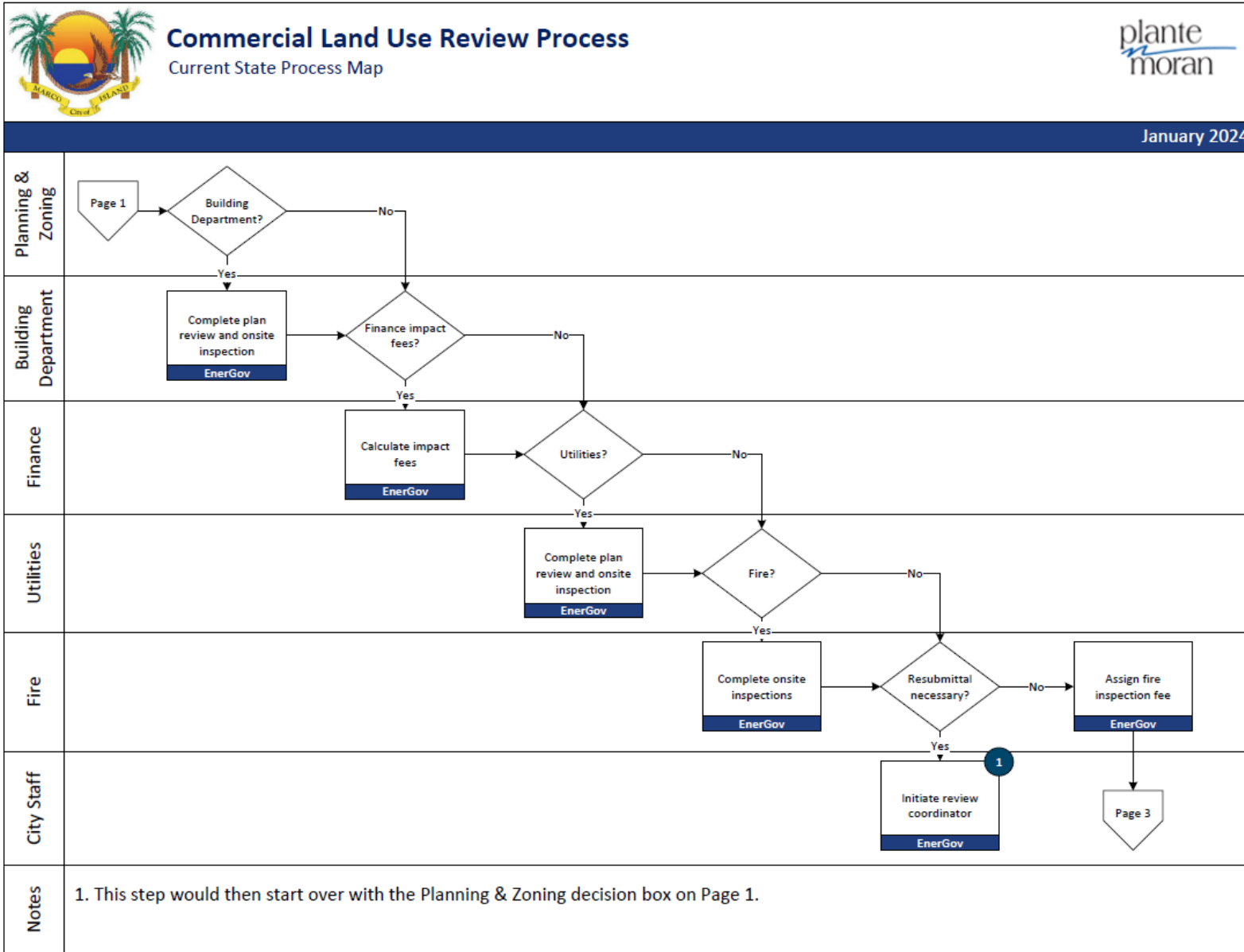
Process Type Category	Community	Type of Measure	Example of Measure
Plan Review	Sunnyvale	Number of surveys sent to applicants of completed planning permit applications, number of respondent sand percent rating the services provided by Planning as good or better	FY Total compared to Goal (650/85%)

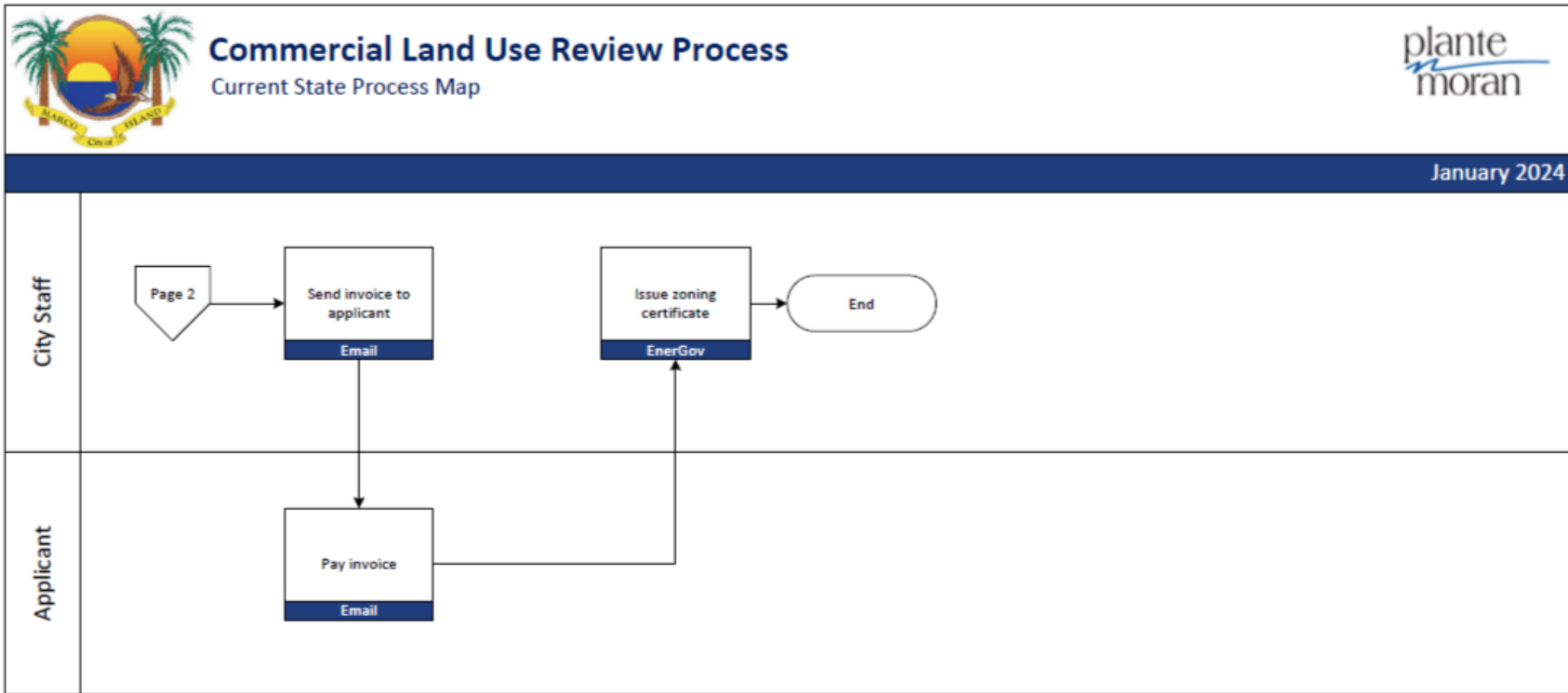
Appendix F – Scope Evaluation Areas

Land management / permitting process scope areas for evaluation	
Function	Process
Planning Site Development Review	Preliminary Review / Zoning Entitlement
Planning Site Development Review	Land Division / Plat / Condo Plan Review
Planning Site Development Review	Design Review / Special Use Approval Administrative Reviews
Planning Site Development Review	Planning Board Review
Planning Site Development Review	Other Commissions (Historic District, DDA, Business District)
Planning Site Development Review	Tree / Landscaping Reviews
Planning Site Development Review	Commercial Land Use Policy Reviews / Parking (Conditions of Use/Approval) Fire Review
Planning Development Appeals	Zoning Board of Appeals / City Council
Building Construction Permitting	Contractor Licensing / Verification
Building Construction Permitting	Application Intake
Building Construction Permitting	Plan Review (all disciplines) Fire Systems (Occupancy – Reoccurring) -
Building Construction Permitting	Inspections (all disciplines)
Building Construction Permitting	Project Cost Invoicing & Performance Guarantees (Escrows, Bonds, etc.)
Building Construction Permitting	Final Approval (Certificates of Completion / Occupancy)
Environmental Review	Wetlands/Natural Features/Forestry Impact / endangered species
Environmental Site Permitting	Stormwater / Site Erosion Control
Public Works	Right-of-Way impacts, traffic, stormwater, and utility connections
Marco Island Utilities	Review commercial plans for utility connection capacity review, annual grease interceptors, site development plan reviews.
Finance Department	Impact Fees Involving Finance Director (Water and Sewer) / Collier County Impact Fees (County Plan Reviewer)
Marco Island Utilities	Annual Grease Interceptor Review
Engineering Site Permitting	Public Acceptance of Privately Funded Utilities
Right-of-Way Management	Franchise Access and Fee Administration, Utility Permitting
Public Safety / Health Safety	Special Event Permitting
Public Safety / Health Safety	New Business Occupancy Inspection (Fire, Health Code)
Public Safety / Health Safety	Cyclical Occupancy Inspection (Fire, Health Code)
Property Code Enforcement	Nuisance Abatement – Initiation, Violation, and Compliance Achieved
Property Code Enforcement	Court / Administrative Enforcement Hearing Process, Orders of Enforcement Process
Property Code Enforcement /Finance	Abatement Performed, Liens / Assessments for Cost/Fine Recovery
FEMA Community Rating System	Structure Flood Zone Determination (SFHA), Structure Flood Exception (LOMA, LOMR)

Appendix G – Commercial Land Use Review Process

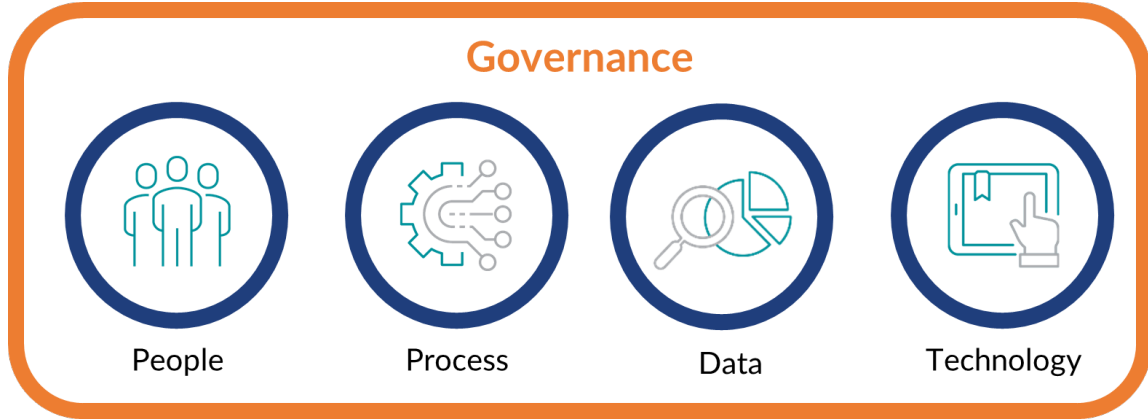






Appendix H: Customer Success Team Framework

The Customer Success Team Framework creates a process to define, assess, prioritize, implement, and sustain customer service improvements. It can be used to assess service enhancements received by customers and staff so they can be evaluated on their overall cost and benefit. The Framework is similar to the [Denver Peak Academy Program](#) that provides frontline staff with the tools to make data driven decision and improve the customer experience.



Governance: Governance establishes the practices used by departments who share and coordinate the joint delivery of services. Permitting and land management decisions frequently span departmental lines of authority. Governance ensures the net organizational benefit to the customer is always at the core of the decision-making process. It ensures City staff manage resources according to defined roles and responsibilities to ensure the business value is recognized over time. It also enables the organization to responsively adapt to changing customer needs.

An effective governance framework addresses key obstacles in customer success initiatives:

- a) Misalignment with strategic priorities - resources are not used to fulfill organization objectives.
- b) Lack of clear senior management sponsorship to enable shared decisions to be made.
- c) Absence of effective stakeholder engagement and support.
- d) Absence of skills to coordinate project resources and identify risks so they can be effectively mitigated.
- e) Lack of understanding or contact with key influencers, customers, investors, etc.
- f) Poor project qualification processes driven by initial cost in lieu of long-term return on investment.


People: The talent and expertise necessary for the organization to deliver IT services, support decision making processes, coordinate activities, and develop staff capacity to sustain the value of services delivered.

Process: Process defines the applicable policies, standard procedures, functional roles/responsibilities, and activities necessary to initiate and sustain the IT services provided.

Data: Data refers to the inputs, outputs, and interim analyses enabling the organization to create and manage information for decision support.

Technology: Technology refers to the IT resources being managed and connected business systems, services, applications, and data being consumed, utilized, or produced from the activities presented.

For each customer success change proposed, the template provided below communicates the scope, resources, business benefits, and measures of success. This tool can assist City stakeholders communicate the business benefits of changes proposed as they are evaluated by the City’s Customer Success Team.

CUSTOMER SUCCESS CHANGE: Title of Recommendation				
DESCRIPTION: This recommendation will improve the customer experience by increasing first pass application success by 20% for all express permit applications that do not require a plan review.				
TIMING & DURATION IN MONTHS				
0 - 2 - 4 - 6 - 8 - 10 - 12 - 14 - 16 - 18 - 20 				
PROJECT PROFILE				
	PRIORITY		EFFORT	
OBJECTIVES <ul style="list-style-type: none"> • Increase customer compliance • Simplify the online application experience • Reduce effort to collect/receipt fees • Provide same-day permitting option 	P 1 0 0	Important, address as resources permit.	E 1 0 0	Minimal effort and/or resources. Typically instituted as resources and coordination permit without service level impact.
	P 1 2 0	Important, should be addressed in next budget cycle with measures to mitigate identified risks.	E 1 2 0	Moderate effort and/or resources. Institute based upon a planned resource allocation to maintain service levels.
	P 1 2 3	Immediate, attention and contingency resources should be made available and corrective measures instituted as soon as possible.	E 1 2 3	Significant effort and/or resources. Institute based upon a planned resource allocation with augmented resources to maintain service levels.
BENEFITS ROADMAP		WHAT DEFINES SUCCESS MEASURES		
<input type="checkbox"/> Increased efficiency and productivity <input type="checkbox"/> Cost avoidance / reduction <input type="checkbox"/> Increased responsiveness <input type="checkbox"/> Increased transparency	<input type="checkbox"/> Improved regulatory compliance <input type="checkbox"/> Enhanced customer success <input type="checkbox"/> Improved staff development <input type="checkbox"/> Improved equity in revenue collection	What measures of success will prove the outcomes anticipated are happening in terms business users expect?		

KEY ACTIVITIES	
PEOPLE	PROCESSES
Target Audience: Who is defining the business expectations and taking ownership of results?	Procedures and Standards: What defines the processes for creating, maintaining, and improving accurate and complete data resources?
Priority: How beneficial is this project to your audience? What is the business priority of the initiative relative to other competing projects or initiatives?	Resources / Services: How will data, applications, services, and resources be consumed by appropriate staff?
Number of Potential Users: What support resources are necessary for the end-users to be proficient and successful in leveraging the tools/capabilities introduced or available?	Processes for Resource Provisioning and Access: How will data be shared with the appropriate parties?
Business Lead Identification: Who within the business unit or service area will be the liaison and power users who understanding how the business is being served?	Measures of Success: How can success of the improvement using IT be recognized in a meaningful way so it can be quantitatively proven as beneficial?
TECHNOLOGY	INFORMATION REQUIREMENTS
Applications: What are the appropriate delivery capabilities for the agency (Online, Desktop, Web Services, and Applications)?	Alignment: What will be done to ensure we can balance supply of resources against the demand for outcomes?
Licensing / Entitlement: What technology capabilities are necessary to be provisioned for the delivery of expected benefits?	Performance: What will be done to measure and realize business value in terms City staff recognize?
Tools/Devices: What types of devices and interfaces are necessary for the consumption of information? (Tablets, PCs, Mobile Phones).	Risk: What ways will risks and opportunities regarding a project / activity be addressed?
Data Access: What means ensure data is managed and exchanged to ensure the integrity of the information being managed?	Communications: What ways should we disseminate information, engage stakeholders, and ensure positive change?

Appendix I – Permit Decision Support Guides

Municipalities use decision support guides as a complement to their online permitting portals. These interactive resources prompt the applicant to answer a series of contextual questions that determine the specific standards applicable to their project. EnerGov customers like the [Charles County, Maryland](#) (“Create a Permit Guide”) and [McKinney, Texas](#) (“Development Navigation Assistant”) enable the customer to create a project-specific, step-by-step guide. The guides are used to package content from the City’s website including applications, online codes, how-to videos, GIS interactive maps, and fee estimators. The guides are typically used to divert high-volume requests for information received by phone and email. They also capture usage metrics to identify the most popular projects and supporting materials.

The screenshot shows the Charles County Maryland website navigation. The main menu includes: SERVICES, OUR COUNTY, GOVERNMENT, BUSINESS, and I WANT TO... Below the navigation, there is a section for project location and information. A central flow diagram shows three steps: Step 1: CREATE A PERMIT GUIDE, Step 2: APPLY FOR A PERMIT, and PERMIT RELATED FORMS. A callout box says "We Want To Hear From You!" with a link to an ONLINE PERMIT GUIDE SURVEY. On the right, there are buttons for ONLINE PERMITTING, CONTACT US (Permit Center, Phone: 301-645-0692, Request an Appointment or Call), and CITIZEN SELF SERVICE PORTAL.

The screenshot shows the McKinney Texas Development Portal. The header includes the logo and navigation links: ENGINEERING, PLANNING, BUILDING INSPECTIONS, CODE SERVICES, REPORTS, and PERMITS. A search bar asks "How can we help you?". Below the search bar is a grid of service categories:

- PLANNING**: Applications & Schedules, Comprehensive Planning, Unified Development Code, Downtown Development, More Options
- ENGINEERING**: Development Process, Environmental Management, Capital Improvements, Forms & Notes, More Options
- BLDG INSPECTIONS**: Fee Schedule, Garage Sales, Fence Permits, Guidelines, More Options
- CODE SERVICES**: Health Compliance, Code Compliance, Animal Services, Mosquito Control, More Options

NAVIGATE THE DEVELOPMENT PROCESS

The diagram illustrates four key navigation tools:

- DNA (Development Navigation Assistant)**: Create an account, answer questions about your project and receive a custom step-by-step guide to permitting your project.
- CSS (Citizen Self-Service Portal)**: Create an account, apply for permits, make payments, request inspections, create new development cases and view real-time data.
- Contact List**: Request a Contact List. Enter your email address and we'll send you the Development Services Contact List and Organizational Chart.
- JDC (Unified Development Code)**: Check out the new development code, adopted by City Council on Nov. 15, 2022.

Which option below best describes your project?

🔍 Search by name or description

Do I Need a Permit for My Home?



New Home, Single Family (Detached)

Building a new single family (detached) home, which consists of a single home on a single lot with no shared walls between homes.



Garage Sale

Hosting a sale for goods, wares and merchandise on private residential property or commercial property that does not have a valid commercial store license has been issued by the state (such as a non-profit or church bazaar or rummage sale).



New Accessory Structure (Detached)

Building a detached accessory structure (i.e., guest house, patio covering, deck, garage, or shed).



Residential Improvements, Repairs, and Replacements

Modifications, alterations, repairs or replacements to the home (interior or exterior) or the lot on which on the home is located.



Residential Additions

Projects that are adding square footage to the main home, such as new rooms, carports, and patio coverings.



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Which option below best describes your project?

Do I Need a Permit for My Home? >

Residential Additions



Air-Conditioned Space

Projects that are attached to or an expansion of the main home's footprint or square footage, and include fully enclosed and air-conditioned spaces, or a mix of air-conditioned and non-air-conditioned spaces. These project may include:

- Addin...

[Show more](#)



Non-Air-Conditioned Space

Projects that are attached to the main home but not air-conditioned spaces, typically including:

- Garage/carport
- Patio cover/ pergola
- Deck

Can't find the right option? [Click here](#) if none apply.



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